

# COTA (NSW)

**Council on the Ageing (NSW) Inc**  
*Estab. 1956*



*Grandfriend - Casula Public School*



*Peer Education volunteer training program*



*Age friendly bus stop*

## **2008/2009 Annual Report**

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# About Council on the Ageing (NSW)

## Mission

Established in 1956, COTA (NSW) is a peak body providing leadership in social policy and community information and education for all older persons in New South Wales and Australia - COTA (NSW) is the voice of seniors over 50.

COTA (NSW) aim's to foster a society where seniors are respected, consulted, included, represented and heard. We work with government, business, the media and the wider community to represent the issues and concerns of consumers.

The Council's Vision embraces the shaping of a more just, equitable and humane community in which older people are enabled to contribute and grow to their full capacity, and have access, with dignity, to appropriate care and support.

## Strategic Aims

COTA (NSW) desires to be widely recognised and accepted by members and other stakeholders as:

- a significant advocate for older people on all issues which concern them
- a prime source of credible information and expertise for all older people and on older people
- a significant influence on development of policies and activities which involve older people

## Working Principles

COTA (NSW) Board, Staff and Volunteers will espouse the working principles of: honesty; objectivity; reliability; confidentiality; pragmatism; persistence; empathy; humanity; responsiveness; cooperation; respect; tolerance.

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### Reports Purpose

This Annual Report was produced to give members and other interested readers an overview of the Council on the Ageing (NSW) and its performance for the year ending 30 June 2009. No responsibility or liability can be accepted by the Council on the Ageing (NSW) Inc. or the authors for any loss, damage or injury that may arise from any person acting on any statement or information contained in this Annual Report of the COTA (NSW).

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## 2008/2009 – A Year in Review

### President's Review

#### Kath Brewster, President

On behalf of the Board, I present this account of the activities of COTA (NSW) for the year 2009.

On looking back over the year I find it difficult to know just where to begin, on what to pin my opening remarks. I can say only that it has been another brutally punishing year, one which has seen activity and endurance, endeavour and achievement. Real sacrifices have been needed from all in the organisation to meet the extraordinary times; more is to come.

In looking forward, however, we look for a note of hope that we may have weathered the worst, that the storm may have abated, and take comfort in the continuing support of our friends both inside and outside the organisation.

#### State Matters

So I turn first to State Matters. As I reported at the end of last year, we made an appointment early in 2008 to the position of Executive Director. Unfortunately, after just 18 months in the job, Jon Bisset decided that the ageing sector was not where lay his interest and he moved on in July this year.

Thus another round of recruitment was commenced, and we have been able to secure into the position David Atkins as from mid-way through October.

David's appointment is based on his work in the community sector for over 21 years; prior to that he worked for some six years in the film and television industry. He comes to us from a nine-year period of managing a large multi-service Neighbourhood Centre in the Eastern Sydney Region.

He has worked proactively with Boards to develop strategic, business and marketing plans for services, policies and procedures, systems and administration, internal and external evaluation of operations.

We feel very pleased with David's appointment and hopefully look forward to a period of stability in the office and growth in the organisation which we sadly need following the past two turbulent years.

In the interim before David's entry on duty, Tim Martin again accepted – reluctantly! – the Acting position and I thank him for once again coming to the rescue in a difficult time, and once again providing excellent service in the job.



As you are aware, development and advocacy of policy on ageing issues is at the heart of our organisation and has been very well achieved this year by our Policy and Communications Unit. This work is supported not only by the elected and employed officers of the organisation, but by our many well credentialed volunteers, all of whom make a very valuable and much valued contribution to this work.

You will see elsewhere in this Report what are the broad directions of policy given by your Board, and how they are being played out in the social and political arenas.

Our participation and advocacy in Taskforce and Committee work is documented elsewhere in this Annual Report. This representation forms an essential part of our policy development and advocacy, enabling us to be informed by, and to influence, the processes of governments and other decision-making bodies.

Our project work also is reported on fully elsewhere in the Report; it has been particularly disappointing to note that the range and scope of our project work has diminished over the past couple of years, due largely to the paucity of opportunities in the global economic downturn. We, of course, have suffered through the vicissitudes of our corporate partners on whom we have relied in partnership to assist by subsidising our activities. Governments themselves have been hit to the point where their support cannot be taken as a given.

Sourcing of sponsorship is a very competitive business in this economic climate, and while we make all efforts to source sponsorships that will allow us to generate some degree of discretionary income, those opportunities have become virtually non-existent.

### **Government and Corporate Relationships**

During the year our Policy and Communications Manager has done a excellent job of securing meetings with many of our NSW State politicians and their staffs, both of the Government and the Opposition, and we have an on-going relationship with most of them.

A list of those corporate and private sponsors from whom we have had support is included elsewhere in the Acting Chief Executive Officer's Report.

### **National Matters**

I reported last year that following an invitation extended to the four COTAs (South Australia, Queensland, ACT and Northern Territory) which had been embroiled in a de-merging exercise from another association to become full members of COTA Over 50s Ltd (the Company) we have been engaged in joint activities. I noted also the resignation from the Company at the end of 2008 of ARPA Over 50s, that organisation having decided that its members' objectives were more compatible with those of another national organisation.

This has resulted in the Company now trading as COTA National. While to date our joint efforts have been concentrated on the policy and advocacy functions, the eight State and Territory COTAs now are looking to how they can cooperate and collaborate more closely in joint ventures.

Following the resignation of Dr Geoffrey Bird from the position of Executive Director (Policy) of the Company, along with other members of staff at the National Secretariat in Canberra, Ian Yates, the CEO of COTA Seniors Voice (i.e. COTA (South Australia)) is undertaking the National CEO duties in an Acting capacity. A National Policy Manager has been appointed on a full time basis within the past few weeks, and recruitment of a National CEO will commence shortly.

In our renewal of old partnerships there have been a number of meetings of the member organisations of the Company around some on-going matters of clarification and resolution. Extreme goodwill and compromise is evidenced in the determination to achieve a satisfactory resolution to any differences of opinion or intent, and we are confident that ultimately a satisfactory outcome will be achieved.

The National Policy Council has functioned throughout the year in meeting its obligations under the Community Sector Support Scheme grant, and this grant has been renewed. In addition to this grant, each of the Member organisations has a levy imposed of 2.0% of its previous year's gross income to facilitate the work of the National Policy Council and the COTA National Board.

The National Policy Council meets bi-annually in Canberra, and this occurred in May and November 2009. The Company Board met in conjunction with the NPC in May this year; however, at a time when there is much business to come before the Board, the previous pattern of two such meetings per annum has been found not to be the most efficient, in that the time available usually is insufficient to allow full debate. Consequently, the Board meets frequently by teleconference, and face-to-face meetings of Presidents and CEOs were held over two days early in September, and further such meetings are scheduled for early in the New Year.

A Project Unit has been established under the COTA banner, and will be examining the best means of achieving oversight of projects which have originated in one or other of the State and Territories, to enable them to run nationally. By agreement of all parties, the Project Unit will operate out of COTA Seniors Voice for a period of three years, following which an evaluation will determine whether such a Unit is adequate to this function, or whether it might be sourced better from a separate company.

Protocols are being established by Agreement of the Members on the manner in which the Parties will work together to progress the business of the Company, and a marketing, business development and resource management company has been contracted to scope the potential of the combined State and Territories COTAs.

### **The NSW Board**

The Board Members continue to be associated with committees and projects of both the Board, and the many external committees on which we are represented essentially to ensure that the voice of the Over 50s in our society is heard to advantage. A listing of such committees is to be found in Appendix 3 in the Annual Report.

We record with gratitude the long service of retiring Board Members, Heather Johnson AM, Averil Fink AM, MBE and Nan Bosler. Averil and Heather each have a long and distinguished history with COTA (NSW), serving the organisation with wisdom and commitment over several decades. Nan was a Board Member since 2001 and a valued contributor to Board process and procedures, always ready with sound advice in debate.

There are a number of new faces on the Board this year. Elected under the terms of your Constitution, Roger Morris, Patricia Campbell and myself were returned to the Board at the Annual General Meeting in November 2008. Additionally, Sara Graham, Janene Eagleton and Kay Robinson were elected to it. The three members co-opted to the Board during 2009 under the terms of the Constitution were Don Woodburn, Colleen Cartwright and Sue Field.

As an interim measure, and to enable a measured recruitment over a three-year period, the Constitution requires that of the members elected at the 2008 Annual General Meeting one third shall retire (and be eligible for re-appointment) at the 2009 Annual General Meeting. Thus Patricia Campbell and Roger Morris voluntarily stood down, and have been re-nominated; I thank both of them for assisting in the Board

process in this way. In addition, two other nominations were received, and the results of the ensuing ballot will be announced by the Returning Officer later in this meeting.

As your elected Board, we have been conscious of our responsibilities, and our accountability to you, our members, and to our sources of funding and sponsorship. We have endeavoured always to act upon this sense of responsibility and accountability when making our decisions as to the objectives of our organisation, and the means by which they will be affected.

The demands made upon Board and staff in fulfilling their obligations under the strategic aims of the organisation as being widely recognised and accepted by all stakeholders:

- *as a significant advocate for older people on all issues which concern them,*
- *as a prime source of credible information and expertise for all older people and on older people,*
- *as a significant influence on development of policies and activities which involve older people*

*(COTA (NSW) Strategic Plan)*

are, to say the least, quite onerous.

All that is done may not be readily apparent to the casual observer. That it is done so effectively and assiduously is a tribute to the commitment that is brought to the organisation by all those who work in and for it, either as paid staff or as volunteers.

At the Annual General Meeting 2008 you adopted a new Constitution to bring it in line with current ASIC requirements. Despite the time and effort put into several Drafts, some errors, and/or items which did not carry through into the Rules have been identified as needing amendment or inclusion by Special Resolution of the Annual General Meeting. The requisite notice has been given to Members and we will be seeking your acceptance of these amendments later in this meeting.

### **Appreciation**

As always at this meeting, there are people to be acknowledged, both within and outside the organisation.

As usual at the top of my list are our staff: without reservation, I acknowledge that they willingly give above and beyond the demands of their job descriptions, no matter what those might be. Thank you, each and everyone of you.

We also are more than well-served by our loyal band of volunteers who contribute to our work and achievements, not only in the more obvious aspects of our work such as the Peer Education projects. We can't all be media stars – as, indeed, are a couple of our very long serving people - but often our volunteers can be found tucked away stuffing envelopes, entering data into computer systems, making sandwiches and serving coffee, participating in Policy Working Groups, filing papers, sorting and cataloguing books and papers in the library and other, sometimes mundane but always essential, tasks. Thank you.

We also acknowledge with gratitude the donations received from individual members. The sums may vary, but the intent does not: each and every donation received represents a sacrifice on the part of the donor because of a belief in what our organisation stands for and achieves.

On a personal note, I wish to thank the Directors for their support in what is not always an easy task as President and Chair, especially the Vice President and the Treasurer for their advice and hard work. Thank you.

The staff also, whom I find always to be pleasant, friendly and helpful in whatever I might seek of them; they have kept me in line! Thank you.

## The Future

Challenging times indeed. Oh! that I had a crystal ball!

You will hear later how 2009 has proved not to be the year of growth for which we had hoped. Indeed: quite the contrary, and our challenges remain:

- how we are to position ourselves as a vibrant, viable vehicle for change and amelioration in a demographically and socially evolving society;
- how we are to respond to the imperative of a more complex set of issues and interactions;
- how we as an organisation necessarily must and can work more closely in strategic partnerships with governments, corporates and cognate organisations; and
- how we must and can tailor our policies and practices to address the unique and unprecedented needs and aspirations of the emerging cohorts of changing and changed generations.

We have to find the means of addressing these challenges, significant at both State and Territories and national level, if we are to play out this demanding scenario and emerge at the other end, intact, even if not entirely unscathed.

The challenges basically revolve around our pushing out the boundaries to build upon the first of our many objectives as an organisation:

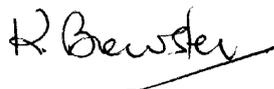
*“... to promote policies, practices and services that advance well-being and justice for older people, and redress injustice, discrimination and disadvantage”  
(COTA (NSW) Strategic Plan)*

Yet again, I acknowledge and thank our members who remain with us. We seek your continued support, by word and deed, of your organisation. As a Board, we can do only so much; so much more depends upon our membership demonstrating that we are, indeed, a credible, relevant, reputable community organisation which can be relied upon to provide effective advice, information and expertise to assist governments and other decision-making bodies in their task of developing policies and planning services which affect older people.

Assist us to work towards the Council's Vision, which:

*“... embraces the shaping of a more just, equitable and humane community in which older people are enabled to contribute and grow to their full capacity, and have access, with dignity, to appropriate care and support.”  
(COTA (NSW) Strategic Plan)*

Thank you.



Kath Brewster  
President COTA (NSW)

## **Chief Executive Officer's Review**

### **Tim Martin, Acting Chief Executive Officer**

The year 2008-2009 was a difficult year in many ways, although several important operational areas were rationalised or improved which will assist our drive to restore our financial position in 2009-2010.

Significant advances were made in the policy field, with the employment of Anne-Marie Elias as Policy and Communications Manager in August 2008 and Carolyn Hodge as Policy Officer in November, as detailed elsewhere in this report. By October the COTA (NSW) website had been completely revised, expanded and upgraded, and the COTA Rap electronic policy newsletter was first issued shortly thereafter.

In January this year we welcomed Dougie Wells, Claire Hall and Judy Feldman, the SPEC team which had been providing Peer Education talks funded via COTA Seniors Voice (South Australia) in New South Wales. Agreement was reached to incorporate this project into COTA (NSW), in part as the successor to our own Medications Management which Suzanne Williams had very successfully administered for seven years. A full report of the Peer Education program also appears elsewhere in this report.

One project came to its successful conclusion on June 30 this year, namely the second stage of the "Stories of Experience" project. The first stage in 2007-2008 comprised the compilation of 24 short reminiscences of older Australians throughout NSW of what we would now call 'environmental awareness' in their early years. The second stage in 2008-2009 involved the consequent publication, launch, promotion and distribution of the "Stories of Experience" paperback anthology. We are extremely grateful to our sub-contractor Real Options for producing the very attractive book, and the Environmental Trust of NSW for funding the entire project. Copies may be purchased via our office or from the Trust.

COTA Individual membership and Organisational membership numbers remained virtually static throughout 2008-2009 (approx. 2,400 and 165 respectively) which was disappointing although economic conditions were at least partially instrumental. In September 2008 administration of the New South Wales Single and Joint membership database (along with other state COTA's membership databases) was resumed by the COTA-owned Insurance and Membership Services company in order to reduce costs via centralisation.

Further improvements were made to our financial administration and accounting reportage in conjunction with our outsourced management accounts partner, Matrix-on-Board. I warmly thank them for their diligence and would like to pay special tribute the unstinting support and substantial voluntary assistance provided by our Treasurer Don Woodburn throughout the year in this regard. In June this year we introduced the EFT (Electronic Funds Transfer) payment method to streamline payment administration.

I would also like to acknowledge the major voluntary contribution provided by Eric Moxham, who single-handedly provided this organisation with its first comprehensive Asset Register, detailing several hundred individual items of equipment, furniture and equipment.

With the assistance of human resources contractor Consultgroup, a complete Legislation Compliance review of our internal HR and employment policies was conducted. Of the total 103 policies and procedures in place, 88 were found to conform or exceed compliance, 15 required updating (in some cases significantly) and 5 new ones were required. By June 30 this process was approaching completion.

Early research and negotiations commenced in June 2009 regarding our office space, with the current lease due to expire in April 2010. At the time of writing this process continues, with the options being to either remain in the present building in a smaller area on another floor, or to find alternative premises nearby. Additionally, in the downturn of the economy, two of our sub-tenants have departed; one (the National Retirement Association) has closed its doors and the other (Catalyst Australia) has been fortunate in being offered alternative free accommodation for the time being.

I would like to sincerely thank all members of staff and volunteers for their individual contributions and personal support (not forgetting those who left us during the year in the review, namely Liz Aitken [Reception], Claire Hall and Judy Feldman [SPEC project] ), the Board for their substantial commitment and expertise they bring to this organisation, and in particular for the leadership and enormous assistance provided by our President. On behalf of COTA (NSW) we also acknowledge the vital financial support provided by the following entities during 2008-2009:

#### **Government grants**

New South Wales Department of Ageing, Disability and Home Care

South East Sydney and Illawarra Area Health Service

Housing NSW

The Environmental Trust of New South Wales (Department of the Environment and Climate Change New South Wales)

#### **Other grants and sponsorships**

IBM

Liverpool City Council

National Prescribing Service

Perpetual Trustees

Pfizer

St. Georges Group

Sunshine Foundation

Sydney Community Foundation

Sydney Opera House

The Beyond Blue Foundation

The Senior newspaper

Webstercare

Tim Martin  
Acting Chief Executive Officer

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## Report of Activities 2008-2009

### Policy

COTA (NSW) continues to strengthen in the policy arena with the employment of a Policy and Communications Manager in August 2008 and Policy Officer in November 2008. The Policy Team has actively built on COTA (NSW)'s range of policy work, including the development policy submissions and papers and contribution to policy through representation on various committees and through participation in conferences and forums.

The policy function of COTA (NSW) is informed by its interaction with the sector, consumers and our identification of policy gaps – areas that are not addressed by other agencies. Intelligence from COTA (NSW) policy, information and project staff, working groups, telephone and web enquiries and COTA's national policy officer network is shared and used to develop policy positions, fact sheets, peer education and healthy ageing talks relevant to older people.

Each year COTA (NSW) submits a Pre Budget Submission (PBS) to the NSW Government for consideration, the 2009-2010 PBS titled "*Towards 2010*" was completed in February 2009. COTA (NSW) President, CEO and senior staff attended meetings with a range of Ministers and Shadow Ministers, Advisors and Departmental representatives to progress the key recommendations in the document. In 2009 COTA (NSW) made representations on the PBS *Towards 2010* to:

- Minister for Local Government – Senior Advisor
- Treasurer – The Hon. Eric Roozendaal
- Minister for Community Services – The Hon. Linda Burney
- Minister for Planning, The Hon. Kristina Keneally – Senior Advisor
- Minister for Ageing and Disability – The Hon. Paul Lynch
- Attorney General - The Hon. John Hatzistergos
- Attorney General (Federal) – The Hon. Robert McClelland
- Premier and Cabinet – Senior Advisor
- Shadow Cabinet (Opposition Leader and Shadow Ministers for Ageing and Disability, Health, Transport, Fair Trading and Treasurer)

In all COTA (NSW)'s policy and advocacy continues from strength to strength epitomised by submissions, partnerships and media coverage of issues affecting older people.

During 2008/09 our submissions included:

- 2008 – COTA (NSW) Submission on Responsible Lending Practices
- 2009 - COTA (NSW) Customer Assistance Policy –  
Department of Water and Energy
- 2009 - COTA (NSW) Draft Housing NSW Disability Action Plan

- 2009 – Staysafe Inquiry into Pedestrian Safety
- 2009 - COTA (NSW) response to Garling Report
- 2009 - COTA (NSW) Access to premises standards submission
- 2009 – National Hospital and Health Reform Commission Feedback
- 2009 - Wood Commission into Child Protection
- COTA (NSW) Pre Budget Submission 2009-2010

Media coverage received from September 2008 to June 2009 is compiled in Appendix 2.

Our COTA Connections newsletter continues to inform members each quarter on upcoming talks and events as well as important information on health and wellbeing. In addition, our electronic newsletter – COTA Rap is produced each month and distributed to a 4,000+ strong database which grows each month. COTA Rap is an important tool to generate more visits to our website, since the launch of the [www.cotansw.com.au](http://www.cotansw.com.au) site in October 2008, we have seen 18,241 visitors view our programs, events, articles, news and blogs.

A key strength of COTA (NSW) has been the development of partnerships and networks across a range of sectors including corporate, community and government. COTA (NSW)'s success is dependent upon its ability to continue to build networks and collaborate with other agencies to meet the needs of older people. In the 2008-09 year partnerships were established with a range of agencies that facilitated better information provision for seniors:

- Legal Aid NSW-COTA (NSW) poster on Legal Help available for older people;
- Centrelink – Briefing for community sector agencies on Federal Budget changes to pension and related payments;
- NSW Fire – COTA (NSW) raising awareness of fire safety among older people;
- Opera House – COTA (NSW) providing free tickets to disadvantage older persons and their companions;
- Public Interest Advocacy Centre – COTA (NSW) Human Rights Consultation with older people;
- Multicultural Health Communication – COTA (NSW) was a judge on the annual Multicultural Health Communication Awards ensuring that resources for older people were recognised;
- NCOSS – Aged Care Services Impacts Working Group – COTA (NSW) is a key driver of the re-focus on HACC wellness approach; and
- NSW Fair Go for Pensioners Coalition – COTA (NSW) continues to resource the Coalition which continues to advocate for income security for pensioners.

COTA (NSW)'s continued involvement and representation on various committees and forums has enabled a wider take up of policy directions relating to older people.

A list of committees and conferences attended is contained in Appendix 3.

COTA (NSW) policy is informed by a wide range of community and expert opinion across a range of issues which affect older people in NSW. Our policy working groups are made up of representatives from the community who come together to advise COTA (NSW) on key policy priorities including retirement income, aged care, housing, legal, transport and grandparents as carers.

COTA's Fair Go for Pensioners Coalition and Grandparents, Relative and Kinship Carers Alliance working parties include representatives from culturally and linguistically diverse communities, regional and rural representatives. COTA's newly formed Age Friendly Environments Working Group includes sector wide stakeholders from NSW local councils, the Independent Living Centre, the NRMA, the Local Government and

Shires Association, People with Disabilities, Australian Domestic and Family Violence Clearinghouse (UNSW), the Benevolent Society's Apartments for Life, Housing NSW, Urban Research Institute, University of Western Sydney, and the Faculty of the Built Environment, University of New South Wales.

In 2009 COTA (NSW) established a Consumer Forum with 21 people aged 50+ representing regional and metropolitan, pensioners, self funded retirees, those still in the workforce, veterans, widows, carers and grandparents. This Forum will be used to inform COTA (NSW) on key issues and directions, as well as to focus test resources developed.

COTA (NSW) strives to include the participation of both indigenous and culturally and linguistically diverse groups in its policy working groups and working parties. In the event that wider representation is not achieved through normal processes, COTA (NSW) staff ensures that a wider range of consumers are consulted.

The policy and advocacy functions of COTA (NSW) continue to strengthen with a consolidation of our work occurring through building on partnerships and consumer engagement to ensure that the voice of seniors is heard in NSW.

## Programs

### Grandparenting

The 2008 Grandparenting Forum called for many changes to be made to the landscape in which grandparents operate. A key call was for greater recognition of grandparents - whether they are caring full time for grandchildren, denied access or providing childcare.

Since the Forum, COTA (NSW) has been working on building connections with key stakeholders in State and Federal arenas. It was decided that our role as advocates and change agents could be expanded exponentially if we were to build linkages with the many government departments, service providers, support networks and institutions that grandparent's access. Similarly, it is our belief that the creation of such linkages helps to break down unhelpful scenarios in which support, information and services for grandparents operate as silos.

COTA (NSW) would like to gratefully acknowledge the support we receive from the Sydney Community Foundation. This invaluable support allows COTA (NSW) to continue working towards more socially just outcomes for grandparents in a variety of complex and challenging situations.

#### Grandparents Raising Grandchildren

The *Special Commission of Inquiry into Child Protection Services in NSW* and the *Keep them Safe* report have provided a welcome focus on the Out of Home Care environment that the NSW Department of Community Services (DoCS) administers. Many grandparents in NSW interface with DoCS as statutory and informal carers. As such, this year has seen COTA (NSW) working towards developing and maintaining open lines of communication with the Department with the aim of promoting policies and procedures that are responsive and respectful to grandparents needs. Throughout the year COTA (NSW) has been meeting with Senior Policy and Operational Staff at DoCS to discuss opportunities to work together including; Producing training materials for DoCS caseworkers and support staff on Grandparenting issues.

- Producing training materials for DoCS caseworkers and support staff on Grandparenting issues.
- Integrating our information resources so that DoCs staff has a more comprehensive understanding of the services available to grandparents outside of the Department.
- Creating links between COTA and DoCS to ensure more consistent and accessible information dissemination to grandparents.

### **A National Response to Grandparenting Issues**

COTA (NSW) has been working with our state counterparts to gather intelligence and identify best practice on Grandparenting issues. We have also been responding to calls for a National Alliance from a variety of state and federal bodies including the Council of Grandparents in Queensland and FaHCSIA.

Our Grandparenting Policy Officer, Prue Fairlie, has spoken at a number of forums advocating for grandparents. These include:

- The Child Support Agency National Stakeholder Meeting
- Centrelink Community Engagement Forum
- FaHCSIA Family Support Program Consultation
- The Child Support Agency's NSW Stakeholder's Meeting

### **Meetings with Grandparent Support Service Providers**

Part of our strategy to progress the recommendations of the 2008 Forum has been to develop links and promote the multidirectional flow of information across the sector. To facilitate this we are developing relationships with a number of service providers and peaks including;

Connecting Carers NSW

Central Coast Support Services

Grandparents Raising Grandchildren Tasmania

NSW Family Services Inc

Legal Aid NSW

Australian Institute of Family Studies

The Mirabel Foundation

The Benevolent Society- Prue Fairlie also recently delivered training to caseworkers at the Benevolent Society on the difference between Grandparent Carers and Foster Carers.

### **The Grandparent, Relative and Kinship Caring Alliance**

In September 2008 the NSW Grandparent, Relative and Kinship Caring Alliance (GRaKCA) was established to unite people and services that operate within the NSW Grandparenting arena. The Alliance works towards ensuring the recommendations from COTA (NSW)'s Grandparenting Forum and the extensive community work in this area are promoted to Government with one clear and common voice.

As convener of the Alliance, COTA (NSW) provides space to meet, administrative support and organises teleconferencing facilities to ensure representation on the Alliance is not limited by proximity to Sydney. Providing a central access point for consumers and service providers to discuss contemporary issues, policy deficits and current research the Alliance has strengthened the capacity of COTA (NSW) and other Alliance members to respond to the challenges of working in this important arena.

## **Legal Aspects of Our Work**

In January 2009, the Federal Attorney General, Robert McClelland, put out a media release announcing funding aimed at assisting grandparents. COTA (NSW) representatives met with the Attorney General in April 2009 to discuss a number of measures, most notably lobbying for the Informal Relative Caregiver's Statutory Declaration that is in place in South Australia to be expanded nationally. Apart from enabling grandparents to provide permission for school excursions, medical treatment and the like, a national statutory declaration of this kind could also provide some much needed consistency across States and Territories.

We continue to develop our relationship with Legal Aid NSW. In an effort to promote information exchange we were thrilled to have Lauren Finestone, Senior Solicitor from the Older Person's Legal and Educational Unit, presenting at a recent Grandparent, Relative and Kinship Caring Alliance meeting.

The issue of Grandparents denied access to their grandchildren is gathering momentum and we continue to receive a number of calls from grandparents who are having difficulty because of access issues. Cases are very complex and diverse, yet the common theme seems to be a lack of access to low cost or free legal representation for grandparents to fight for their rights to be acknowledged. This is an area that we have identified for further study and action.

## **Information for Grandparents**

We continue to lobby various Ministers to see a One Stop Shop style information service set up for Grandparents and while we have not had any firm commitments to date there have been some welcome suggestions on ways forward to bring the one stop shop into reality. We have investigated a number of models utilised in other states in order to better understand how they provide information to seniors and grandparents. The Queensland model has provided a very workable example in which a grandparent help-line runs in tandem with the Seniors' Information Service, although there are two separate websites. The beauty of the Queensland model is that calls are not time limited and operators can provide advice and information (not just referrals) to Grandparents on a number of issues.

COTA (NSW) is currently updating the raising grandchildren website. The new website will be managed in house allowing us to easily upload current news and events. We are also investigating ways of expanding the site to include a blog facility so that we can organise virtual support group interactions for rural, remote and regional carers to have a space to link up and access peer support.

## **The Report of the COTA (NSW) 2008 Grandparenting Forum**

The Report of the COTA (NSW) 2008 Grandparenting Forum was finalised this year. COTA (NSW) staff have been working closely with the Ministerial Advisory Committee on Ageing to organise the launch of this important document and we gratefully acknowledge the MACA's input and support. This last year has seen COTA (NSW) policy staff and the GRaKCA Alliance working on progressing the report's recommendations with vigour. We stand ready to capitalise on any new opportunities that may arise from renewed interest in these important issues when the report is released later in 2009.

## **Post Script**

COTA (NSW) met with The Hon Linda Burney, Minister for the Department of Community Services (DoCS), in July this year to lobby for greater parity between grandparent carers and foster carers (including access to respite), support for an

Aboriginal Grandparenting Forum, more sustainable funding for grandparent support services and a place on the DoCS' Community and Carers Advisory Group.

In August 2009, our request to be granted a place on the DoCS Community and Carers Advisory Group was granted. This group was set up to ensure that the needs of carers and service users are acknowledged as the government proceeds with the work set out in *Keep Them Safe*. We look forward to representing the needs of grandparents in this forum in the coming year.

## **Healthy Ageing Talk Series**

COTA (NSW) continued to conduct regular community information seminars to enable people over 50 and organisations providing services to be better informed on matters concerning their health. A cross section of health talks addressing problems that are challenging as we age. The first Man Alive, Men's Health Day was held in June which was a great success. The enthusiasm in the room was good and we received feedback from over 80 men who participated. The speakers held the audience captive whilst being interesting, informative and entertaining. A Women's Health Day is planned for the coming year.

COTA (NSW) talks held in the CBD

- Advance Care Planning
- Macular Degeneration – Are you at risk?
- Healthy Ageing – Exercises for Youthfulness
- Healing the Spinal Cord
- Chiropractic Principles
- Maxim-eyes your Sight
- Man Alive! Men's Health Day

In an effort to meet the increasing need for community education on issues relating to ageing well we have been collaborating with Marrickville and Campbelltown Councils, Wollondilly Shire Council and specific disease related organisations. Raising the awareness throughout the community is of vital importance as COTA (NSW) would like to make a difference in everyone's health through these information sessions.

## **Peer Education**

2009 – A year of challenges and rewards.

2009 has been a year of challenges and rewards for NSW Seniors Peer Education Centre (NSW SPEC) for both paid staff and volunteers.

The year began with the merger between NSW SPEC and COTA (NSW), providing a combined team of peer educators numbering around 35 volunteers, mostly within metropolitan Sydney.

Paid staff at NSW SPEC wish to acknowledge the high levels of commitment and energy our volunteers have demonstrated in the past 12 months in making health information on medicines and also on depression and older people more accessible to those people in our target groups. This has been one of the rewards of the work itself.

One of the challenges has been to continue to source those in our target groups who have not used our free service. This has not always been easy to accomplish given the length of time we have been in operation.

One of the rewards in 2009 has been our involvement in the *Beyond Maturity Blues* pilot project, aimed at various Indigenous and Culturally and Linguistically Diverse (CALD) seniors groups in metropolitan Sydney. The project aims to recruit, train and support seniors in their own language, who then go onto present the talk on depression and older people in that language. We are aware that older people whose first language is not English can have difficulties accessing quality information on their health. Consequently, the project addresses this need, whilst raising the profile of the organisation with agencies representing seniors from an indigenous and culturally and linguistically diverse heritage.

NSW SPEC acknowledges the support it has received from the Ethnic Communities Council of NSW, and also from Italian Christian Workers Associations in Leichhardt, who helped with the recruitment and support of Italian volunteers for the first phase of the pilot. Other communities included in the pilot are Greek, Chinese and Vietnamese older people. The pilot runs to June 2010.

NSW SPEC has also begun 2 other pilot projects with different partners. One partnership is with Housing NSW, where we have recruited and trained several older public housing tenants to deliver a medicines-related talk to their peers. The pilot has great potential and we look forward to a successful project with our partner.

Our other pilot project is with Energy Australia and Sydney Water, presenting information to seniors on how to reduce consumption of electricity and water, as well as costs. Once again, this project has great potential, given the topicality of how we respond to the challenges of climate change.

In conclusion, we thank all of our volunteers, past and present, for their continued hard work, as well as our partners Housing NSW, Energy Australia and Sydney Water for your interest in using peer education as an effective communication method with older people.

We look forward to 2010 and are sure that it will bring with it a fresh set of challenges and rewards.

## **Grandfriends**

The *Grandfriends* intergenerational program continues to work within NSW public primary schools under the watchful eye of the founder, Iris Wallis. During 2008 the *Grandfriends* program celebrated 20 years of seniors volunteering to assist students and teachers in their classroom in literacy and numeracy programs. Through the *Grandfriends* program, members of the younger and older generations can learn from one another and begin to understand and respect one another. *Grandfriends* helps to bridge the generation gap.

A Community Development Support Expenditure (CDSE) Scheme funding of \$5,000 was received from John Edmondson V.C. Memorial Club Limited. This funding was used to promote and extend the program in the Liverpool area. There are 22 registered volunteers now working in 6 schools in the Liverpool area.

The program has continued to expand in the regions of Campbelltown, Central Coast, Blue Mountains and Sydney. We currently have 84 registered *Grandfriends* working in 32 public primary schools. At the end of 2008 COTA (NSW), together with Iris Wallis and Dorothea Marler, Central Coast Co-Ordinator conducted morning teas in Campbelltown and the Central Coast. The *Grandfriends* shared positive outcomes they have had from the program and exchanged stories and ideas on improving the experience for both the volunteers and the children.

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## Finance Report

### Treasurer's Review

#### Don Woodburn, Treasurer

As a not for profit organisation, normally recurrent income and expenditure should closely match each other. COTA (NSW), accordingly each year's profit or loss should be minor.

The year 2008/9 has been a bad year and to help explain this I am repeating what I reported at last year's Annual General Meeting.

"Year 2006/7 produced a deficit of \$8,747". That year was not expected to be a normal year as we had lost the SIS contract the previous year and we anticipated that this would result in a deficit as it would be difficult to replace the income lost and to reduce the related core expenses. The Budgeted deficit had been \$40,213, however, as reported last year, this was materially offset as a result of bringing to account, as income, unspent sponsorship income from past projects.

Our original budget for 2007/8 was for a deficit of \$31,566. This year was an eventful year for COTA (NSW). There was a period of three months when we operated without an Executive Director, following the resignation of the previous incumbent. Jon Bisset commenced duties in mid January 2008 and a revised budget was prepared for the 2007/8 year.

This budget was for a forecast deficit of \$48,900.

However, the final result, as detailed in the Financial Report was a deficit of \$21,798.

Year 2008/9 was budgeted to be a surplus of \$12,056.

Year 2008/9 has actually resulted in a deficit of \$63,018.

The Income Statement and attached notes in the Audited Financial Accounts detail the results for the year compared to the previous year. The Statement of Income and Expenditure enclosed in the Accounts package on the last page, is unaudited. However, it explains in more detail the variances compared to the previous year.

Our principal problem has been a failure to increase our level of income, principally from sponsors and advertisers in COTA Connections. Possibly we can partially blame the Economic Crisis for this (Interest and Donation income was down by a combined amount of \$26,209), however we have certainly failed to achieve a level of income to cover our operating expenses.

It is possible that some expenses were higher than we would have liked, however, sometimes it is difficult to contain expenditure, especially without the benefit of hindsight. Expenditure is being tightly controlled and in the opinion of the Directors cannot be cut without that having a most detrimental effect on the services provided by COTA (NSW).

Considerable improvement has been made in the standard of documentation and review of the budgeting process for the year 2009/10. Detailed reviews of actual

results compared to Budget and year end forecasts are currently being made on a quarterly basis.

Despite the material loss this last year, COTA (NSW) continues to be in a sound financial position, with Total Equity of \$ 358,646. However, the trend of annual deficits, which COTA (NSW) has experienced since 2003 (with the exception of 2005), must be reversed in the near term.

Donald H. Woodburn FCA  
Honorary Treasurer

## Appendices

### Appendix 1 – Board of Directors and Management

#### Board of Directors

##### Current as at 30 June 2009

Kath Brewster OAM	President
Roger Morris AM	Vice President
Don Woodburn	Treasurer
Patricia Campbell	
Sara Graham	
Janene Eagleton	
Kay Robinson	
Colleen Cartwright	
Sue Field	

#### Management

Chief Executive Officer	David Atkins (from 12 <sup>th</sup> October, 2009)
Administration Manager	Tim Martin
Policy & Communications Manager	Anne-Marie Elias
Policy Officer	Carolyn Hodge
Project Officer – Peer Education	Suzanne Williams
Project Officer – Peer Education	Dougie Wells
Project Officer – Peer Education	Karen Kruger
Project Officer - <i>Grandfriends</i>	Ruth Anstice
Policy Officer – Grandparenting	Prue Fairlie
Information Officer	Annette Barnes
Advertising Sales	Frank Gribble
Executive Director	Jon Bisset (until July 2009)
Receptionist	Liz Aitken (until April 2009)
Peer Education	Judy Feldman (until March 2009)
Peer Education	Claire Hall (until May 2009)
Public Officer	Tim Martin
Auditor	LBW & Partners

## Appendix 2 – Media Coverage

Month	Media	Interview	Topic
Sep-08	3RRR Radio	Jon Bisset	Pensions
Sep-08	2SM Leon Dellaney	Jon Bisset	Pensions
Sep-08	Daily Telegraph	Geoffrey Bird	Pensions
Sep-08	Today Tonight	Kath Brewster	Age Discrimination
Sep-08	Online Opinion	Kath Brewster	Ageing
Sep-08	Gold Coast Tweed Head Seniors	Sue Field	Abuse of Older People
Sep-08	Salvation Army - Pipeline	Kath Brewster	Ageing
Oct-08	Channel 10 News	Prue Fairlie	Grandparenting
Oct-08	SMH Money Section	Jon Bisset	Pensions
Oct-08	The Melbourne Age, Money Section	Jon Bisset	Pensions
Oct-08	The Australian	Prue Fairlie	Grandparenting
Oct-08	Northern Beaches Community Radio - Retirement Show	Jon Bisset	COTA in general
Oct-08	The Senior	Jon Bisset	Fair Go for Pensioners
Oct-08	2SM Radio	Jon Bisset	Fair Go for Pensioners
Oct-08	Eastside Radio	Jon Bisset	Fair Go for Pensioners
Nov-08	The Senior	Prue Fairlie	Grandparenting
Nov-08	The Senior	Jon Bisset	Fair Go Rally
Nov-08	SMH Page 3	Anne-Marie Elias	Local Government
Nov-08	ABC Radio	Anne-Marie Elias	Local Government

Nov-08	ABC Online	Anne-Marie Elias	Local Government
Nov-08	2SM	Anne-Marie Elias	Fair Go Rally
Nov-08	2UE Steve Price	Charmaine Crowe (CPSA)	Fair Go Rally
Nov-08	Channel 9 News	Jon Bisset	Fair Go Rally
Nov-08	Channel 10 News	Jon Bisset	Fair Go Rally
Nov-08	ABC TV News	Jon Bisset	Fair Go Rally
Nov-08	AAP Media	Jon Bisset	Fair Go Rally
Nov-08	6PR (Perth Radio)	Anne-Marie Elias	Fair Go Rally
Nov-08	East Side Radio	John Bisset	Fair Go Rally
Nov-08	2SER Radio	Noreen Hewitt (CPSA)	Fair Go for Pensioners
Nov-08	2SM	John Bisset	Fair Go Rally
Nov-08	2GB - Chris Smith	Jon Bisset	Fair Go for Pensioners
Dec-08	The Senior	Jon Bisset	Mini Budget
Dec-08	SMH	Di Brentnall	Self funded Retirees
Dec-08	2SM	Kath Brewster	Fair Go for Pensioners
Dec-08	ABC South East Radio	Anne-Marie Elias	Fair Go for Pensioners
Jan-09	Channel 9 News	Carolyn Hodge	Self Funded Retirees going on the Pension
Jan-09	Cordell Jigsaw SBS Doco	Carolyn Hodge	Contributing to research on pensioners
Jan-09	Today Tonight	Iris Wallis	<i>Grandfriends</i>
Feb-09	2UE Breakfast	Kath Brewster	Stimulus Package
Feb-09	ABC News	COTA (NSW) quoted	Stimulus Package
Feb-09	SMH	Anne-Marie Elias	Stimulus Package

Feb-09	The Senior	COTA (NSW) quoted	Fair Go for Pensioners
Feb-09	SMH Money Section	Kath Brewster	Self Funded Retirees
Feb-09	Eastside Radio	Jon Bisset	Pension Review
Feb-09	Adelaide Advertiser	Kath Brewster	Pension Review
Feb-09	Sun Herald	Kath Brewster	Pension Review
Feb-09	Sunday Age	Kath Brewster	Pension Review
Feb-09	The Ridge News	Kath Brewster	Pension Review
Feb-09	Brisbane Times	Kath Brewster	Pension Review
Feb-09	Sunday Telegraph	Fair go for Pensioners	Pension Review
Mar-09	Online Opinion	COTA (NSW) quoted	Pension increase
Mar-09	2SER radio	Sirka Duncan (ASSCA)	Returning to work after retirement
Mar-09	Queanbeyan Age	Kath Brewster	Pension increase
Mar-09	The Senior	COTA (NSW)	Self funded retirees
Apr-09	Sunday Telegraph Body & Soul	<i>Grandfriends</i> Volunteers	<i>Grandfriends</i>
Apr-09	Whats Good for You - Channel 9	Suzanne Williams with granddaughter	Grandparents
Apr-09	2GB Radio - Sunday Crew	Kath Brewster	Ageing population - perceptions of ageing
Apr-09	2SER Radio	Kath Brewster	Retirement Villages
Apr-09	National Radio News	Jon Bisset	Pension increase
Apr-09	ABC Radio	Anne-Marie Elias	Pension increase
Apr-09	2SM	Anne-Marie Elias	Pension increase
Apr-09	The Senior	Jon Bisset	Access to premises standard
May-09	2GB Radio	Kath Brewster	Budget 09

May-09	2GB Radio	Kath Brewster	Post budget 09 impacts
May-09	ABC 702BL	Kath Brewster	Budget increase eligibility for pension
May-09	The Leader	Carolyn Hodge	Fair Go for Pensioners - Budget 09
May-09	SBS World News TV	Cate Turner (OWN)	Budget impact on pensioners
May-09	The Senior	Jon Bisset	Budget 2009
May-09	2SER radio	Sirkka Duncan (ASSCA)	Self Funded retirees
May-09	ABC Radio - Life Matters	Catherine Bridge (UNSW Faculty of the Built Environment)	The family Home
Jun-09	Daily Telegraph	Diana Lee Gobbit (Consumer Forum)	Pensioners' food spend
Jun-09	SMH Money Section	Ross & Audrey Power (COTA (NSW) Volunteers)	Banking and older people
Jun-09	2SM Leon Delaney	Jon Bisset	NSW Budget
Jun-09	The Senior	Jon Bisset	NSW Budget - Seniors Impact Statement
Jun-09	The Senior	Jon Bisset	Aged care Cost shifting NSW Budget

## **Appendix 3 -**

### **Committees - Consultations and Briefings - Conferences**

#### **Committees**

- The Home Modification Information Clearinghouse Project, Faculty of Health Sciences, The University of Sydney  
IMPACTS, NCOSS and Aged and Community Services Association
- Oral Health Alliance, NCOSS
- Oral Health Special Needs Advisory Group, Sydney South West Area Health Service (SSWAHS)
- Aged Care Alliance, NCOSS
- Planning for Later Life Forum, Office for Ageing
- Health Policy Advisory Group, NCOSS
- NGO Housing Partners Reference Group, Housing NSW
- Independent Pricing and Regulatory Tribunal Working Group (IPART)
- Meals on Wheels
- Chronic Illness Alliance, NCOSS
- Consumer Trade and Tenants Tribunal
- Customer Council, Energy Australia
- Agency Liaison Group, Aged Care Standards Accreditation Agency

#### **Consultations and Briefings**

- Creating Walkable and Wheelable Communities, Ministerial Advisory Committee on Ageing, Department of Ageing, Disability and Home Care (DADHC)
- Community Roundtable, Role, Approach and Issues in Social Support, Commonwealth Ombudsman
- Launch of NSW Oral Health Alliance Report, NCOSS and NSW Branch Australian Dental Association
- Housing NSW – Review of letters to tenants
- Human Rights Consultations
- IPART Stakeholder meeting on customer impacts associated with the 1 July 2009 retail price increases for regulated customers
- DADHC HACC Consultation on Statewide Project Priorities
- National Shelter and Shelter NSW - Solutions to Seniors Housing Round Table
- Stakeholder briefing regarding the proposed merger of the Public Trustee Public Guardian and Office for the Protective Commissioner
- Family support program sector consultation (FaHCSIA)
- Stakeholder consultation on grandparenting – Child Support Agency
- Centrelink Grandparents Stakeholder briefing
- NSW Department of Community Services Budget
- NSW DADHC Budget
- Housing NSW Budget
- Energy Australia assistance measures for customers experiencing payment difficulties

## Conferences

- State Plan – Which way to Social Justice, NCOSS, Sydney
- Australian Association of Gerontology Conference, Perth
- Australian Association of Gerontology Regional Conference, Broken Hill
- Home and Community Care Conference, Sydney

## **Council on the Ageing (NSW)**

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