



## Candidate Information Pack

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**Sunnyhaven Disability Services**

Chief Financial Officer

May 2026

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## Executive Summary

### The Organisation

Sunnyhaven Disability Services has built a remarkable legacy over 75 years, evolving from a community initiative founded in 1951 into a respected registered NDIS provider headquartered in Kogarah, Sydney.

Sunnyhaven supports people with disability across Supported Independent Living, short-term respite, day programs, and support coordination – all underpinned by a clear values framework and a vision of genuine equality and inclusion. Financially, Sunnyhaven is well-positioned for its next chapter. With a \$13m operating budget and an asset base of approximately \$35m, the organisation combines operational discipline with strategic ambition – including plans for continued organic growth and asset acquisition. It is led by an experienced CEO, Liz Cohen, and a skills-based Board.

The Chief Financial Officer role has become available following the decision of the current CFO, who has served with considerable distinction in the position for three years, to pursue an external opportunity. Sunnyhaven is now seeking to appoint an outstanding CFO who will build upon this strong platform and help shape Sunnyhaven's future direction.

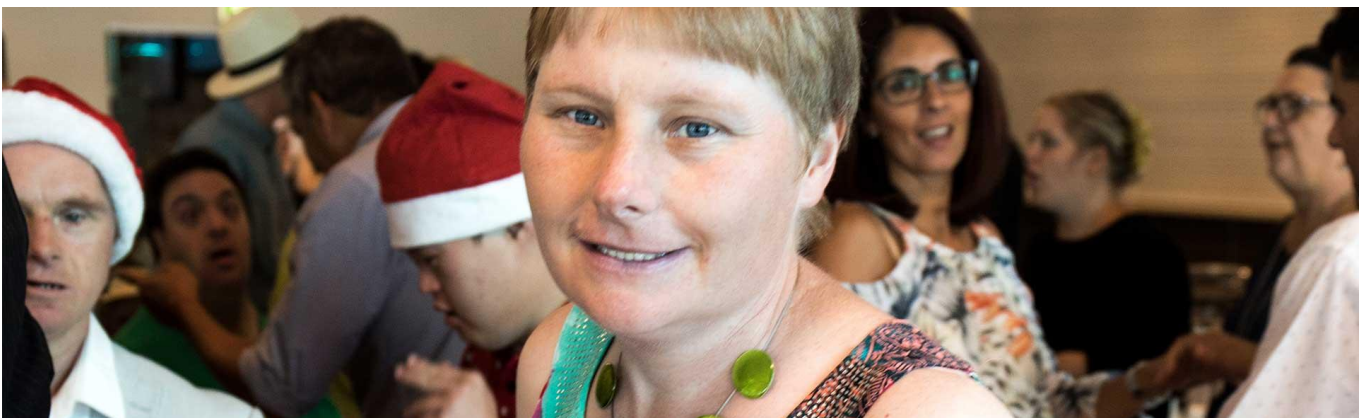
### The Role

This is a broad and highly influential executive role that extends well beyond traditional finance. The CFO will lead the organisation's corporate services portfolio, including Finance, People & Culture, ICT, Property and Fleet, and play a central role in shaping Sunnyhaven's future direction.

The role offers a unique opportunity to:

- Operate as a strategic partner to the CEO and Board
- Lead the "engine room" of the organisation, ensuring financial sustainability and operational discipline
- Influence decision-making across the business
- Contribute to the growth and long-term impact of a purpose-driven organisation

Sunnyhaven is seeking a commercially astute, hands-on executive who is equally comfortable operating at a strategic level and engaging deeply in operational delivery.



## About Sunnyhaven Disability Services

Sunnyhaven Disability Services is a well-established, values-driven not-for-profit organisation supporting people with disability across New South Wales.

With over 70 years of history, Sunnyhaven provides a range of services including:

- Supported Independent Living (SIL)
- Short-term accommodation (respite)
- Day programs
- Support coordination

Sunnyhaven operates with a strong financial foundation, with an annual budget of approximately \$13 million and a solid asset base including property and cash reserves. The organisation is known for its:

- Person-centred approach to care
- Commitment to independence, inclusion and community participation
- Strong values-based culture grounded in integrity, respect and compassion

The organisation is led by an experienced CEO and a skilled, engaged Board, with a clear focus on sustainability, quality service delivery and growth.

## SUNNY PHOTOS



## Sunnyhaven's Strategic Direction

Sunnyhaven Disability Services is entering an important phase of strategic growth and organisational development through its 2027–2030 Strategic Plan.

The organisation's strategic direction is focused on ensuring Sunnyhaven remains a sustainable, future-ready and values-driven provider of high-quality disability services in an increasingly complex and evolving operating environment.

Key strategic priorities include:

- Strengthening safeguarding and delivering high-quality, person-centred supports
- Supporting people with disability across all life stages, including ageing participants and younger cohorts
- Building stronger community engagement and strategic partnerships
- Renewing and expanding housing and infrastructure capability
- Strengthening financial sustainability, operational performance and governance
- Leveraging technology and innovation to improve service delivery and organisational effectiveness
- Sunnyhaven's strategy is underpinned by a strong commitment to client outcomes, responsible stewardship, long-term sustainability and continuous improvement.

## Vision, Purpose and Values

### Vision

A community where people we support live their best possible lives.

### Purpose

To provide high-quality, person-centred services that build capability, safeguard wellbeing, and support people with disability across all life stages.

### Values

#### *People First*

We prioritise the aspirations and rights of the people we support, their families, and our staff.

#### *Integrity*

We do what is right especially when it is difficult. We are transparent, accountable, and courageous in our decisions.

#### *Sustainability*

We invest in partnerships and innovation to secure our future, so Sunnyhaven remains strong for generations to come.



## Position Description – Chief Financial Officer

### 1.1 Role Overview

<b>Position Summary</b>	The Chief Financial Officer (CFO) is accountable for all financial, HR and administration, ICT and risk management across Sunnyhaven’s operations. The CFO will develop and oversee financial strategy, the design and management of financial models, and metrics tied to strategy, and the on-going development and monitoring of control systems designed to grow Sunnyhaven's assets and report accurate financial results.
<b>Reporting to</b>	Chief Executive Officer
<b>Business Units</b>	Finance, People & Culture, Administration, ICT, Property and Fleet,
<b>Location</b>	Kogarah NSW

### 1.2 Key Responsibilities

<b>Strategy and Board</b>	<ul style="list-style-type: none"> <li>• Develop and manage financial reporting and insights into Sunnyhaven’s business activities including Board reporting</li> <li>• Contribute to and implement Sunnyhaven’s strategy as agreed by the Board</li> <li>• Work to the strategic operating targets and budgets of Sunnyhaven</li> <li>• Develop and oversee implementation of project plans to deliver area specific and organisational-wide improvements</li> <li>• Work as part of the Executive Leadership Team to execute organisational strategy</li> <li>• Represent Sunnyhaven in appropriate forums, including sector and government</li> </ul>
<b>Governance, Risk, Assurance and Quality</b>	<ul style="list-style-type: none"> <li>• Meet all applicable statutory requirements and functions as set out in relevant legal, regulatory, contract and grant requirements</li> <li>• Meet all applicable minimum and recognised best practice standards</li> <li>• Maintain the appropriate insurance cover for Sunnyhaven’s business activities</li> <li>• Oversee and implement Sunnyhaven Risk Framework and Risk Register</li> <li>• Ensure compliance with all relevant policies and procedures,</li> </ul>

	<ul style="list-style-type: none"> <li>Identify and manage all potential business risks in line with Sunnyhaven’s expectations and frameworks including implementing business continuity action plans</li> </ul>
<b>Finance</b>	<ul style="list-style-type: none"> <li>Advice on long-term business, commercial and financial planning for the organisation</li> <li>Provide leadership, direction, and management of the finance team</li> <li>Manage the processes for financial forecasting and budgets, and overseeing the preparation of all financial reporting including Board Reporting</li> <li>Provide advice on external policy, and budgetary environments for Sunnyhaven to act accordingly</li> <li>Ensure financial targets are met or implement strategies that will correct or reduce unforeseen outcomes</li> <li>Manage Sunnyhaven’s investments and assets, including property and vehicle fleet</li> </ul>
<b>ICT</b>	<ul style="list-style-type: none"> <li>Lead and implement Sunnyhaven's Technology and Digital Strategy, including cybersecurity, systems, infrastructure, and security</li> <li>Create business value through technology, ensuring the technological systems and procedures lead to outcomes in line with Sunnyhaven’s strategy</li> <li>Ensure availability of timely and reliable information through technology and digital platforms to assist informed decision making</li> <li>Ensuring investment in technology, including cybersecurity, is matched to risks</li> </ul>
<b>Continuous Improvement and Sustainable Growth</b>	<ul style="list-style-type: none"> <li>Continuously improve performance across all areas of service delivery through the measurement and analysis of appropriate performance indicators</li> <li>Work with the Executive team to ensure delivery of cost-effective operations</li> <li>Ensure staff are appropriately trained and developed to drive business improvement and efficiency</li> <li>Ensure appropriate systems are in place for monitoring Sunnyhaven’s business performance against plans and targets</li> <li>Ensure that operating objectives and standards of performance are understood and owned by employees</li> <li>Identify and respond to external market factors and opportunities affecting business performance to ensure sustainable growth of services</li> </ul>

<p><b>Leadership</b></p>	<ul style="list-style-type: none"> <li>• Coach, develop and empower employees to achieve set goals and outcomes</li> <li>• Provide leadership, direction, specialist knowledge and advice to Managers and Team Leaders to ensure services are developed and delivered in a cost-effective way and meet the financial expectation for each service</li> <li>• Maintain a collaborative culture and ensure training, professional development and active performance management is provided to employees</li> <li>• Manage the annual performance appraisal system (including Identified actions) and address employee performance and corrective action plans</li> <li>• Recruit, induct and manage the probation process.</li> <li>• Run regular staff team and individual meetings to disseminate information and share ideas and strategies</li> <li>• Provide training, advice, and practical assistance to build competence and expertise</li> <li>• Monitor team performance and morale</li> <li>• Facilitate and promote a culture that encourages performance and high morale</li> <li>• Educating senior staff on general finance and budgeting, including profit and loss, balance sheet and cash-flow management</li> <li>• Ensure employees are aware of and meet their responsibilities associated with Sunnyhaven’s policies and procedures and relevant legislation</li> </ul>
<p><b>People &amp; Culture</b></p>	<ul style="list-style-type: none"> <li>• Provide leadership and direction to the People &amp; Culture team</li> <li>• Oversee the recruitment, onboarding and performance management of Sunnyhaven’s workforce</li> <li>• Optimise skill development and the development of a training schedule to meet operational and business needs, ensuring there are appropriate development opportunities</li> <li>• Ensure payroll process meet all legislative requirements and internal audits are implemented</li> <li>• Implement workforce planning to meet the business requirements</li> <li>• Oversee the Work Health and Safety policies and procedures ensuring a safe workplace environment</li> <li>• Ensure Sunnyhaven meets all employee/worker legislative requirements</li> </ul>

### 1.3 Skills and Attributes

<b>Qualification and Experience</b>	<ul style="list-style-type: none"> <li>• Tertiary qualifications in Accounting, CPA/CA qualified.</li> <li>• MBA or similar business degree desirable</li> <li>• Experience in senior/executive finance role</li> <li>• Technical accounting capability and significant analytical skillset</li> <li>• Experience in strategic procurement, mergers and acquisitions and business partnering highly desirable.</li> </ul>
<b>Skills and Knowledge</b>	<ul style="list-style-type: none"> <li>• Experience in managing stakeholder relationships to achieve set objectives.</li> <li>• Demonstrated ability to identify operational improvements and influencing others to drive change</li> <li>• Ability to build a strong sense of team ownership and maintain a high level of staff morale</li> <li>• Effective interpersonal and communication skills including the ability to negotiate complex matters and resolve conflict</li> <li>• Strong problem-solving and critical thinking skills and the ability to exercise sound judgement and make decisions based on accurate and timely analysis</li> <li>• Strong interpersonal skills, ability to communicate and manage well across all levels of the organisation</li> </ul>
<b>Personal Attributes</b>	<ul style="list-style-type: none"> <li>• Eager to learn new concepts and practices</li> <li>• Able to take initiative</li> <li>• Empathetic and compassionate towards people</li> <li>• Well organised</li> <li>• Ethically minded</li> <li>• Self-motivated and independent thinker</li> <li>• Trustworthy</li> <li>• Self-reflective</li> <li>• Creative in approaching challenges</li> </ul>

### 1.4 Role requirements

<b>Clearances</b>	<p>A satisfactory criminal record check is required</p> <p>Working with Children’s check</p> <p>NDIS Clearance</p> <p>Covid Vaccination status</p>
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<b>Car License</b>	A valid Australian Drivers' Licence
<b>Right to work with Australia</b>	Australian or New Zealand citizenship or relevant working visa documentation
<b>Commitment to Sunnyhaven Values</b>	<ul style="list-style-type: none"> <li>• Act with integrity</li> <li>• Be bold</li> <li>• Focus on Others</li> </ul>

## Additional Information and Useful Links

For additional information about the organisation, please see links below:

- <https://sunnyhaven.org.au/>
- <https://sunnyhaven.org.au/about-us/>
- <https://sunnyhaven.org.au/vacancies/>
- <https://sunnyhaven.org.au/our-services/>
- <https://sunnyhaven.org.au/contributions-sponsorship/>
- <https://sunnyhaven.org.au/sunny-stories/>
- <https://sunnyhaven.org.au/ndis/>
- <https://sunnyhaven.org.au/contact-us/>



## The Application and Selection Process



**Rob Macmillan – Partner Health and Human Services, Derwent** is leading the delivery team for this search process, contributing to candidate sourcing, interviewing and overall assignment facilitation with Sunnyhaven Disability Services.

Rob is based in Sydney and is a Partner in the Derwent Health and Human Services practice and works with public, not for profit and private hospital, health, aged care, disability, and associated organisations in the sourcing of their executive leadership talent. Rob has developed extensive networks, both nationally and internationally, and works closely with his clients to deeply understand their requirements; he then works with his team to engage with and attract the very best talent. Rob graduated from Warwick University in the UK with a BA (Hons) Politics and International Relations.

### *Candidate Care*

We are committed to ensuring that potential applicants and candidates are treated respectfully and fairly. The Derwent team is available to manage inquiries and ensure that applicants are informed about developments as they become available. Candidates who are shortlisted and complete assessments - including interviews, will be offered a feedback session to discuss their experience and the assessment results.

### *Salary Package and Location*

The role will be based at the Sunnyhaven Disability Services head office in Kogarah. An attractive remuneration package will be offered.

### *How to apply*

Please submit your CV and a brief cover letter addressing the following 3 areas:

- Your interest in the role?
- What you bring to the role and to Sunnyhaven Disability Services?
- Your vision for the role?

### *For further information*

If you have any questions about this opportunity, please contact Rob Macmillan, Partner Health, Derwent Search at [healthservices@derwentsearch.com.au](mailto:healthservices@derwentsearch.com.au)

### *Timeline*

- Interviews with Derwent will take place May.
- Interviews with Sunnyhaven Disability Services will take place June.
- Offer and acceptance anticipated late June.

### *Why join Sunnyhaven*

This is a broad, impactful executive role with real influence. It affords the CFO the opportunity to contribute to meaningful outcomes for people with disability, working for a values-driven, purpose-led organisation, a supportive and committed Board and established leadership team. The CFO will help shape the future direction and sustainability of the organisation.

### *Reference checks, pre-employment verification and background checks*

For candidates in final consideration, at least two referees will be contacted with permission before a formal written offer is made. Any written references provided will also be checked and additional referees may be sought to further understand a candidate's merits for the role. Any offer will be subject to some or all of the following checks: Academic Qualification Check; Professional Membership Check; Criminal History and Working with Children Checks.

**Applications close: Sunday 31st of May**

**Thank you for your interest in Sunnyhaven Disability Services.**

# Sunnyhaven Disability Services Ltd

## 2024–2025 Annual Report

### Building Capability

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#### Acknowledgement of Country

Sunnyhaven acknowledges the Traditional Custodians of the lands upon which we work. We pay our respects to Elders past, present, and emerging, and extend this respect to all Aboriginal and Torres Strait Islander peoples. Their deep connection to land, water, and community guides our commitment to inclusion, dignity and respect.

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#### Message from the Chair and Chief Executive Officer

It is our privilege to present the **2024–25 Annual Report** for Sunnyhaven Disability Services Ltd.

This year has been one of resilience, growth, and meaningful progress as Sunnyhaven continued strengthening its services, systems, and governance in an increasingly complex NDIS environment. Our commitment to person-centred, high-quality support has remained unwavering as we responded to sector reform, workforce challenges, and growing community demand.

Across the year, we delivered more than **172,000 hours of direct support**, expanded our workforce capability, strengthened governance frameworks, improved operational structures, and advanced major organisational initiatives, including digital transformation and strategic growth opportunities.

We extend our sincere thanks to our dedicated staff, our Board of Directors, and the clients and families who place their trust in Sunnyhaven.

**Naomi Sharpe**

Chair

**Liz Cohen**

Chief Executive Officer

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## Year in Review

Key Measure	2024–25 Result
Total Clients Supported	166
Total Service Hours Delivered	172,569
SIL Clients	41
Day Program Participants	57
Individual Support Clients	17
Support Coordination Clients	51
Total Workforce	122
Training Hours Completed	1,328
NDIS Registration Audit	Achieved (May 2025)
New Board Directors Appointed	4
New Accessible Vehicle Purchased	1
Major Strategic Projects	ERP Review, BEHHA EOI, Operations Restructure, ACNC Self-Evaluation

## Strategic Priorities in Action

### 2023–2026 Strategic Plan: Building Capability

#### 1. Service Excellence

Sunnyhaven delivered **172,569 hours** of disability support this year, reflecting our commitment to person-centred care and quality outcomes.

Key achievements:

- Maintained full NDIS Practice Standards compliance.
- Strengthened Clinical Governance Framework.
- Enhanced incident management, feedback, and safeguarding processes.
- Launched Open Days providing families with direct access to the leadership team, opportunities to ask questions and receive clear updates on Sunnyhaven's priorities, upcoming NDIS reform and provide feedback.

#### 2. Workforce Development

Sunnyhaven's people are the heart of our service.

## Workforce Snapshot (June 2025)

Category	Staff Count
Office & Administration	8
Operations & Service Delivery	111
Support Coordination	3
<b>Total Staff</b>	<b>122</b>

## Training and Capability

Across the year, staff completed **1,328 hours of training**, covering:

- NDIS Practice Standards and compliance
- Safeguarding and quality management
- Person-centred practice
- Leadership development
- Digital capability (ERP and new systems)

## Operations Restructure

A major organisational restructuring was completed to strengthen leadership capacity, streamline operational oversight, and improve cost efficiency.

Key outcomes included:

- Redundancy of Accommodation Manager and Site Coordinator roles
- Re-establishment of Team Leader positions
- Appointment of a **General Manager of Operations**
- Improved management-to-service staff ratio aligned with sector benchmarks
- Increased strategic capacity for the COO to focus on quality, compliance, business development, and future service opportunities

## 3. Growth and Innovation

### Digital Transformation

The implementation of **Ability ERP Stage 2** marked a major milestone; however, a comprehensive review identified that the system was not adequately aligned with Sunnyhaven's operational needs or resource capacity.

Following this assessment, and with Board endorsement, Sunnyhaven initiated a **Request for Proposal (RFP)** to identify an alternative ERP system that is:

- more user-friendly
- efficient
- higher performing and
- scalable for future growth

## **Ability Roundtable Membership**

Sunnyhaven became a member of **Ability Roundtable**, Australia's largest disability sector benchmarking body. Participation will strengthen our evidence base across:

- SIL benchmarking
- Financial and workforce benchmarking and
- Alignment with NDIA cost modelling

## **BEHHA Strategic Opportunity**

Sunnyhaven was formally invited by BEHHA Enterprises Inc. to submit an Expression of Interest (EOI) for the potential transfer of their services and assets. After undertaking a thorough strategic review and Board consideration, Sunnyhaven submitted an EOI and has since been nominated as BEHHA's preferred applicant. Sunnyhaven has now commenced the formal due diligence phase to evaluate the opportunity in detail.

## **4. Governance**

Sunnyhaven continues to strengthen financial, operational, and governance sustainability.

### **Government Reporting**

All government reporting obligations were met, including:

- **ACNC** – Australian Charities and Not-for-profits Commission
- **ASIC** – Australian Securities and Investments Commission
- **WGEA** – Workplace Gender Equality Agency
- **ATO** – Australian Taxation Office
- **DSOA** – Disability Support for Older Australians

After the 2024 AGM Sunnyhaven's ASIC and ACNC profiles were updated following Board appointments.

### **Preparedness for NDIS Reform**

Throughout the year, Sunnyhaven maintained active oversight of the NDIS Review and commenced internal planning to anticipate and respond to future reforms. This included reviewing client impacts, service delivery processes, and operational systems to ensure Sunnyhaven can adapt effectively to new regulatory expectations. Our focus remains on minimising disruption to clients while strengthening organisational readiness for sector-wide change.

### **Portable Long Service Leave Submission**

Sunnyhaven provided a formal submission to the NSW Government outlining concerns and recommendations for the proposed Community Services Portable Long Service Leave Scheme, addressing cost impacts, administrative burden, workforce implications, and implementation challenges.

## Programs and Service Impact 2024–25

### Service Hours Delivered

Program Area	Clients Hours	
Supported Independent Living (SIL)	41	117,174
Day Programs	57	45,464
Individual Supports	17	7,077
Support Coordination	51	2,854
<b>Total</b>		<b>172,569 hours</b>

### New Accessible Vehicle

Sunnyhaven expanded its accessible transport fleet with the purchase of a 2024 Volkswagen Caddy5 Maxi fitted with a wheelchair loading and restraint system, supporting safer client transport and improving opportunities for community inclusion.

## Governance and Leadership

### Board Composition & Recruitment

Sunnyhaven received strong interest in its Board recruitment in 2024 with 30+ applications received. Four candidates were shortlisted and appointed, bringing valuable skills aligned to Sunnyhaven's strategic needs. The appointed candidates were:

- **Tony Yortis**  
Experienced ICT executive with over 30 years in digital transformation, customer service, engineering, telecommunications, and health. Skilled in technology governance and large-scale service delivery.
- **Laura Connarty-Duncan**  
Senior operations and general management professional with more than 20 years' experience across arts, business, and not-for-profit sectors. Skilled in organisational leadership, people management, and strategic operations.
- **Simone Dossetor**  
Executive leader with 20+ years in insurance and consulting, specialising in transformation, governance, change management, strategy and regulatory compliance. Skilled in stakeholder engagement and innovation.
- **James Woodburn**  
Property and leasing specialist with extensive Asia-Pacific experience. Skilled in portfolio management, commercial negotiations, project delivery, workplace optimisation, and strategic property planning.

### Board Director Farewell

In May 2025, the Board formally acknowledged the resignation of **Maurene Horder**, who concluded her service to Sunnyhaven after nine years of dedicated leadership.

Maurene joined the Board in **2016** and made an enduring contribution throughout her tenure. She provided strong and steady leadership as **Chair in 2018**, and later as **Vice Chair from 2019**

**to 2021**, always demonstrating sound judgement, strategic insight, and an unwavering commitment to the wellbeing of our clients.

*On behalf of the Board, the Executive team, and the entire Sunnyhaven community, we extend our heartfelt thanks to Maurene for her tireless service and outstanding contribution. We wish her every happiness for the future and express our deep appreciation for her commitment to ensuring a strong and positive future for Sunnyhaven.*

### **Property Committee and Property Strategy**

The Board established its first **Property Committee**, chaired by **James Woodburn**, with membership including **Angelo di Benedetto**.

A Terms of Reference has been established, and work is underway on a comprehensive property strategy that will guide future decisions and major projects.

### **Governance Improvements – ACNC Self-Evaluation**

Sunnyhaven undertook the ACNC Governance Standards Self-Evaluation, reaffirming our strong compliance framework and highlighting areas for further strengthening.

Priority actions include:

1. Executing the Governance Action Plan
2. Embedding ongoing compliance and policy review cycles
3. Reporting outcomes and recommendations to the Board for oversight

### **Leadership**

CEO Liz Cohen attended significant events and forums across the year including the Australian Institute of Company Directors (AICD) Governance Summit and the AICD Not for Profit Leaders' Breakfast, to name a few, ensuring Sunnyhaven remains connected to sector-leading governance practice and insight. Liz again sat on the National Disability Services State Committee.

## **Achievements and Recognition**

- **Winner** – 2024 Bayside Business Awards (Community Services Category)
- Successful client and staff events, including celebrations and community engagement days
- Strengthened organisational reputation across the sector

## **In Memoriam**

This year, Sunnyhaven sadly mourned the loss of two long-standing members of our community:

**Ricky Evans** – a beloved resident and client for more than 20 years, remembered for his warmth and humour.

**Cheryl Stoddart** – supported by Sunnyhaven since 2013, deeply valued by staff and peers.

We express heartfelt gratitude to the staff who supported them with compassion during their final months. Their presence will be greatly missed.

# Financial Overview

## 2024–25 Financial Snapshot

- **Revenue:** \$12.8 million
- **Expenditure:** \$13.9 million
- **Operating Deficit:** \$1.1 million after provisions were made in 2 significant areas

## Looking Ahead: 2025–26

Sunnyhaven's future priorities include:

- Progressing due diligence for the BEHHA opportunity
- Implementing a new ERP system
- Developing the 2027–2029 Strategic Plan
- Strengthening workforce capability and retention
- Preparing for NDIS reform implementation
- Expanding service capability and community engagement

## Acknowledgements

We extend our sincere appreciation to:

- Our clients, families, and carers
- Our Board of Directors
- Our staff
- Our community and sector partners

Sunnyhaven remains committed to its vision: **A world where all people are treated equally and with respect, regardless of their needs.**

And together, we continue to **live our values.**

1. **Act with Integrity**
  - We are honest, ethical, and transparent in everything we do.
2. **Be Bold**
  - We are courageous in our decision-making, embrace innovation, and challenge the status quo to improve outcomes.
3. **Focus on Others**
  - We put people first, actively listen, and strive to make a positive difference in the lives of those we support and work with.

These values guide our behaviours, decisions, and the way we deliver services across Sunnyhaven.