

# Capability Statement

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Partnering with not for profits and charities for success



**Next Dimension**  
ACCOUNTING





# INTRODUCTORY SUMMARY

Next Dimension Accounting was established in 2021 to provide outsourced financial solutions to Australian Not-for-profits (NFPs). Our approach is technology-driven and client focused, empowering our clients to concentrate on their key strengths, adapt swiftly to change and prosper.

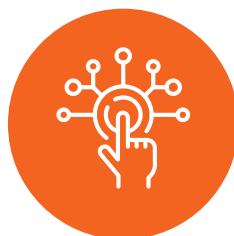
Next Dimension continues to receive accolades for its services, and our experienced team has produced excellent results for our clients. In a few short years, we have achieved our goal of being known as an expert provider of accounting services and advice for Australian NFPs.

## OUR MISSION

To supply decision makers with timely access to information they understand, empowering them to make informed decisions and achieve success.



Accounting  
Expertise



Tech-savvy  
team



Innovative  
solutions



Trusted  
advisers



# ABOUT NEXT DIMENSION ACCOUNTING

Next Dimension Accounting (NDA) is a team of expert accountants who provide business analysis, insights, and advice that enable strategic growth. With a focus on delivering timely and relevant business information, our mission is to empower our clients to make informed decisions and achieve lasting success.

NDA was established to lead and innovate in the accounting space. Our clients represent many leading NFP organisations.

NDA provides highly skilled services in the areas of bookkeeping, payroll, reporting, data analysis, financial modelling, taxation compliance, and advice, along with an On Demand CFO service.

As Xero experts, we seamlessly facilitate transitions from your current accounting system to Xero, leveraging the latest software and AI-driven processes to enhance efficiency.

We prioritise personalised service, tailoring our solutions to meet each client's unique needs.

Our service provides exceptional value for money, enabling NFPs to optimise their financial resources effectively.

We offer innovative solutions to help our clients adapt swiftly to changing market dynamics and achieve sustained growth.



# EXPERIENCE

Our team has decades of experience in the accounting industry. We have served numerous clients during our journey and are proud to continue our support.

Utilising cutting-edge technologies such as Xero, ApprovalMax, DEXT, Weel, Power BI, Deputy, XBert, plus many more, we offer secure data storage, real-time access and improved collaboration for our clients.

We are committed to continuous learning and development, ensuring our team remains at the forefront of industry trends and best practices.

We have accumulated valuable experience working with a broad range of NFP clients across multiple sectors.

We have been recognised for our achievements in the accounting industry and were finalists in the Australian Accounting Awards for the Start-up Firm of the Year, Fast-Growing Firm of the Year, and Boutique Firm of the Year (Less Than 20 Employees) categories in 2023. In 2024, we were also finalists in the Boutique Firm of the Year (Less Than 20 Employees) and Marketing Program of the Year categories.

## NFP and Charity Experience

We specialise in serving various NFPs and understanding their distinct financial and compliance requirements and challenges.

NDA applies accounting standards throughout the year, so clients are not blindsided by year-end audit adjustments. We stay on top of current matters relevant to our clients, which empowers us to contribute to discussion papers on accounting and compliance for NFPs and present at national conferences.

We work with NFP clients to:

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Minimise outlay through cost-effective accounting technology

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Ensure effective reporting to the Board and ACNC

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Satisfy ATO and compliance requirements

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Strategise for future growth and stability with our On Demand CFO service

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Assist with grant budgets and acquittals

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Our NFP clients highly recommend our services:

**// Our experience with NDA has been nothing but positive and we have gained confidence in knowing our financial future which includes monitoring and controlling budgets in a more resilient way. //**

- Patsy Wilshire, CEO of Star Community Services

# PRODUCTS AND SERVICES

Next Dimension provides the following services to NFP clients.



## Bookkeeping & Payroll

**We introduce bookkeeping services that will transform the way you operate.**

- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- BAS Preparation and Lodgement
- Budgeting and Forecasting
- Debtor Management
- Expense Reporting
- Fixed Asset Management
- General Bookkeeping
- Leave Management
- Payroll Processing
- Single Touch Payroll
- Tech Stack review
- Xero Add On advice
- Xero Conversion and Setup
- Xero Optimisation



## On Demand CFO

**We strengthen outcomes and seize opportunities with professional advice.**

- Advisory Services
- Audit Liaison
- Board Finance Training
- Board Meeting Representation
- Budgeting and Forecasting
- Cash Flow Management
- Cost Management
- Financial Analysis
- Financial Modelling
- Financial Reporting
- KPI Development
- Mergers and Acquisitions
- Risk Management
- Scenario Analysis
- Stakeholder Reporting
- Strategic Planning
- Systems Analysis
- Unit Costing



## Reporting

**We produce insightful financial reporting that shapes success.**

- ASIC Agent
- ACNC Annual Information Statement
- Audit Preparation
- Benchmarking Reporting
- Board Reporting
- Compliance Reporting
- Financial Dashboards
- Financial Statements
- Grant Acquittals
- Grant Reporting
- KPI Monitoring
- Management Reporting
- Power BI – Interactive Data Visualisations
- Project Reporting
- Registered Office
- Segment Reporting
- State Based Reporting
- Variance Analysis











## Tax Services

**We minimise risk and satisfy compliance.**

- BAS and IAS
- Capital Gains Tax
- Fringe Benefits Tax
- Goods and Services Tax
- Income Tax
- Payroll Tax
- Salary Sacrifice
- Self Managed Superfunds
- Small Business Tax Concessions
- Tax Advice
- Tax Agent
- Tax Audit Assistance
- Tax Planning
- Tax Structuring

# CLIENTS

## NFP types:

 <p><b>Community transport providers</b></p>	 <p><b>Sporting groups</b></p>	 <p><b>Humanitarian aid organisations</b></p>
 <p><b>Support organisations</b></p>	 <p><b>Peak bodies</b></p>	 <p><b>Clubs</b></p>
 <p><b>Schools</b></p>	 <p><b>Health Services providers</b></p>	 <p><b>Arts</b></p>

## NFP clients:

Activus Transport

Allergy & Anaphylaxis Australia

Bankstown Canterbury Community Transport Ltd

Bathurst Community Transport

Benefolk Foundation

Coast & Country Community Services

Community Connect Transport

Community Links Wellbeing Ltd

Community Refugee Sponsorship Australia

Delta Therapy Dogs

Go Gentle Australia

Infrastructure Sustainability Council

Inspiro Health

International Institute of Communications Australian Chapter

Jubilee Community Services

National Allergy Council Limited

One Girl Australia

Prostate & Breast Cancer Foundation Ltd

Ranges Community Health

Star Community Services

Talent Development Project

The Survivor Hub Ltd

Wheelchair Rugby League Australia

# ACHIEVEMENTS AND CLIENT RESULTS

## Case study: WRLA – Support services at the World Cup

Next Dimension Accounting (NDA) has worked closely with not-for-profit organisation Wheelchair Rugby League Australia (WRLA) for six years and is a valued partner.

Wheelchair Rugby League is an inclusive sport that is a variation of the running game. People with and without disability play the sport from social to elite level. NDA has helped to build WRLA's success and resilience as an international sport.

NDA provides accounting support such as organisational budgeting, reporting, grant budgeting and acquittals, international sports funding applications and developing scenarios and projections to assist the WRLA board with strategic decision-making and planning.

WRLA Director Joseph Chidiac says, "Next Dimension Accounting is an indispensable part of our team. Their team's expert guidance and invaluable insights have powered our organisation's continuous growth and success in the fiercely competitive world of sports funding, grants and donations."

Like many organisations, WRLA is mainly run by volunteers. Nevertheless, the organisation has secured some significant grants and receives affiliate funding through the NRL. It also receives funding when the Australian Wheelaroos team participates in major tournaments like the Rugby League World Cup. This funding needs to be managed well to ensure that the funder's objectives are achieved and that funding ultimately catalyses the growth and development of WRLA. Reporting requirements in the form of grant acquittals need to be managed well to ensure WRLA meets all compliance requirements and can apply for future grants with confidence and a good track record.

"A really valuable contribution was Next Dimension's support of our World Cup campaign," says Joseph. "For WRLA to send Australia's national team to the UK in 2022, we had to fundraise in advance and apply for major grants."

With the welcome fiscal backing in place, more financial management was required to keep managing the budget for the Wheelaroo's tour of the UK. "As the figures changed, we had to stay focused and spend responsibly," adds Joseph.

NDA stepped up its accounts support. Brendan says, "From helping develop the budgets, we were soon managing funds received through sponsorships, coordinating team allowances and recording funding expenditure for acquittals. In the lead up to the team's international tour, we had regular meetings with WRLA Directors to ensure the organisation's requirements were met."

Thanks to NDA's support, WRLA's national team secured a remarkable top-three position at the prestigious Wheelchair Rugby League World Cup. "Next Dimension's outsourced accounting team played a pivotal role, providing the essential staffing and financial advice that transformed our World Cup dream into a triumphant reality," says Joseph.

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- Joseph Chidiac, Director, WRLA





## Case study: Activus Transport – Outsourced accounting enables expansion

Activus Transport is a leading community transport provider that was first established in the Sutherland Shire in 1979. Since that time, the organisation has grown and developed to service more than 3,000 clients with a fleet of 22 vehicles, 30 staff and more than 80 volunteers.

When a long-term employee retired, the organisation was on the lookout for an accounting firm that could replace the role of an internal bookkeeper with an outsourced accounting service. A presentation from Brendan Lucas from Next Dimension Accounting (NDA) detailed the expertise and ideas that could assist Activus Transport, and highlighted the value of harnessing technology and engaging outsourced accounting services.

The NDA team has since played an integral role in ensuring that Activus Transport meets all financial compliance requirements, manages the organisation efficiently, and accesses real-time information that the management team needs to support the organisation's growth and resilience.

One of the first actions taken by NDA was to replace the organisation's outdated accounting software with Xero software. The adoption of Xero transformed the way that volunteer reimbursement, payroll and reporting occurred.

Volunteer reimbursements had been handled manually, resulting in a significant input of time and coordination. NDA automated this process, so the volunteer reimbursements occurred every fortnight by electronic funds transfer. This development improved outcomes for both volunteers and Activus Transport by providing consistency and freeing up staff to focus on other tasks.

When NDA came on board, he transformed the organisation's ability to analyse and measure. CEO Greg Stanger said, "The systems that Next Dimension Accounting set up have allowed me to access the data I need to make informed decisions, and that analysis has been behind every major decision we have made.

"Whether that is changes to fee pricing and to the types and mix of vehicles, or changes from volunteers to paid drivers, this analysis brought a higher understanding of our costs and what we could and couldn't do. It has allowed us to understand the unit per costing within our organisation."

The Activus team was very impressed by NDA's willingness to truly understand the sector and what the organisation was going through at a higher level. Greg comments, "That means the Next Dimension team did not just look at our operations; they also took the time to understand our contract terms that contained complex funding arrangements. They really go that bit further, understanding outside factors that are impacting us."

Led by recommendations from Activus Transport, word has spread about the benefits of engaging the NDA team who now supply outsourced accounting services to six community transport organisations across New South Wales and Queensland.

Activus Transport,  
CEO, Greg Stanger



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- Greg Stanger, CEO, Activus

# HOW WE WORK

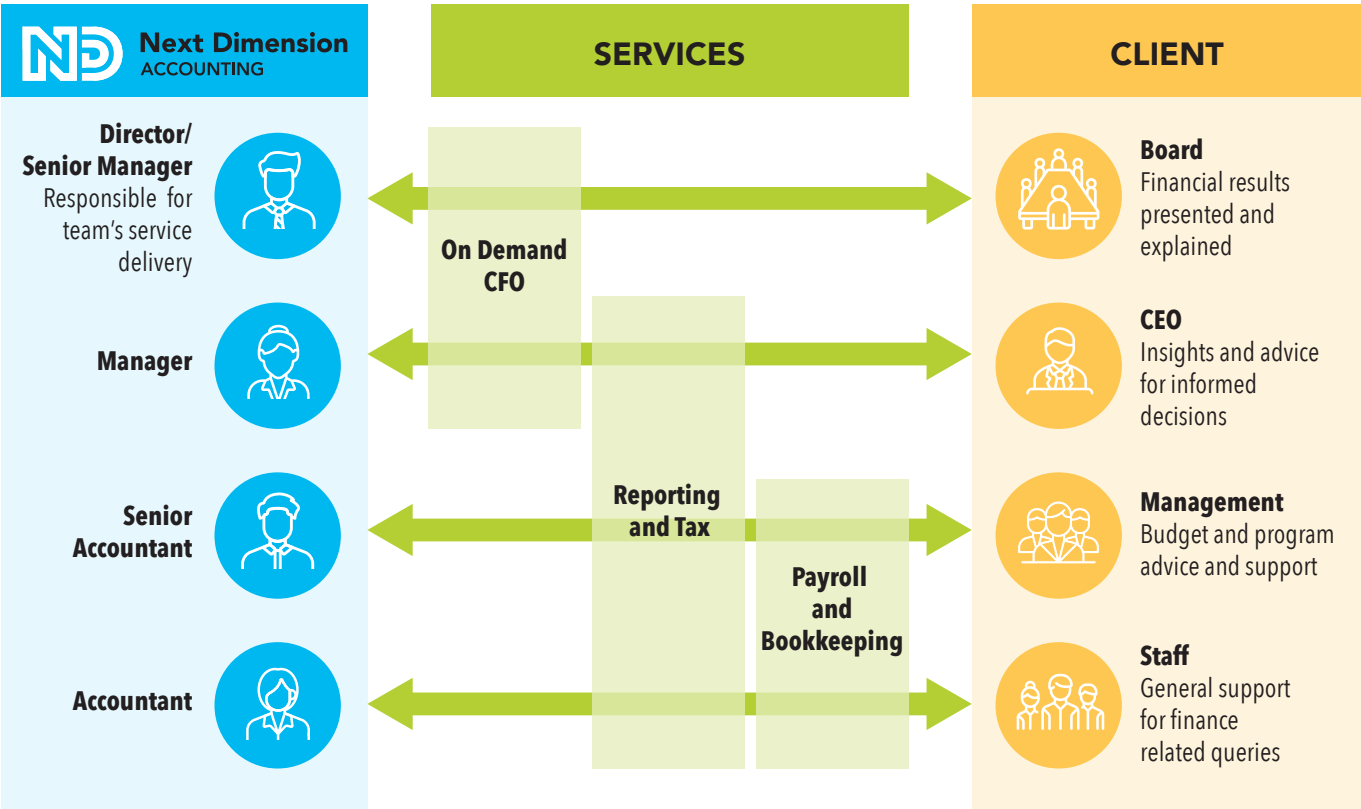
At Next Dimension Accounting, our team of experienced accountants, bookkeepers, and support staff works alongside clients as partners. We are committed to delivering tailored solutions that help organisations stay focused on their objectives, mission and activities.

## Your Next Dimension Accounting Support Team

At NDA, we provide timely and easily understandable information to decision-makers and their organisations, enabling them to make informed decisions and succeed.

Our multi-dimensional support team helps mitigate the risk of key person dependency within our clients’ organisations.

We work across various touchpoints, offering independent expert advice to boards to assist them in their oversight duties. Our team also supports CEOs and Senior Management by helping them plan, build, and meet all compliance requirements. Internal processes and operations, including reporting, tax, payroll, and bookkeeping, are seamlessly supported to boost compliance and operational efficiency.





# SENIOR LEADERSHIP TEAM QUALIFICATIONS AND COMPETENCIES

Our team comprises qualified and experienced accountants, including professionals who are Registered Tax Agents holding CA or CPA certifications. We hold all necessary insurance and are committed to continuous learning and development, ensuring our team remains at the forefront of industry trends and best practices.

The Next Dimension Accounting team is led by:

## Founder and Managing Director Brendan Lucas CA

Brendan's approach is shaped by his 20 years+ commercial and NFP experience.

From nine years at PwC, advising private business owners on complex tax and business issues to his expertise guiding early-stage NFPs or those looking to expand.

Brendan has served in key voluntary roles, including Treasurer of the Sutherland Shire Business Chamber and the Manly Warringah Rugby League Referees' Association.

As a tech-savvy accountant, he excels in leveraging technology to streamline accounting processes, reduce costs, and enhance the timeliness of financial reporting to facilitate better decision-making.

His adeptness at numerical analysis and technological applications empowers clients to perform necessary financial analyses much more efficiently.

With his comprehensive experience and strategic insight into growth, team development, and innovation within the NFP sector, Brendan is well-equipped to help organisations stand out and achieve their goals in a competitive landscape.

### Formal qualifications:

Chartered Accountant

Bachelor of Commerce Accounting

Registered Tax Agent



## Professional Memberships and Community Support



## Our Business Awards



## Client Services Director

### Joanne Fahd CA



Client Services Director Joanne Fahd CA Jo is an experienced professional with an extensive background in public practice, banking, financial services, and commerce, particularly in the non-profit sector. With over 29 years of diverse experience, she is well-equipped to provide comprehensive support to NFPs committed to making a difference in their communities. Her firsthand experience with various NFPs, including those in community transport, aged care, childcare, and other special interest sectors, has given her a deep understanding of the unique challenges and opportunities these organisations face. She is passionate about aiding their missions and dedicated to assisting them in navigating financial complexities, optimising operations, and maximising impact. Offering personalised attention and strategic guidance tailored to the specific needs of each NFP client, Jo acts as a trusted partner. Her support allows clients to redirect their focus from accounting and tax concerns to their core missions.

#### **Formal qualifications:**

Chartered Accountant & Registered Tax Agent  
Bachelor of Business

## Senior Manager

### Tina Webb CA



Senior Manager Tina Webb CA Tina has a passion for numbers and analysis. She brings 25+ years experience from working with both NFP and business clients, ranging from small enterprises to large corporations. She thrives in diverse sectors and enjoys collaborating with cross-functional teams. Previously, Tina held positions in finance and sales at Unilever and currently volunteers as the Treasurer for her local football club. Her expertise is centred on tax and reporting compliance, particularly in identifying and addressing gaps in financial reporting to deliver effective solutions to her clients. With over a decade of experience in both paid and voluntary roles with NFP clients, Tina is committed to ensuring that these organisations fully understand the financial information crucial for their success. She enjoys providing valuable insights to help NFP clients achieve their objectives and optimise and simplify their financial operations.

#### **Formal qualifications:**

Chartered Accountant & Registered Tax Agent  
Bachelor of Commerce



# BROAD CAPABILITIES AND NETWORKS

## Benefolk Membership

Next Dimension Accounting is a specialist member of Benefolk, Australia's only multi-disciplinary consultant collective for the not-for-profit and charity sector. The collective has helped more than 300 organisations find professional services and support over the past five years. Members work together to create tailored, personalised approaches that suit client needs. Benefolk is a certified Social Enterprise and invests back into the sector through its sister charity, Benefolk Foundation, Australia's only Health Promotion Charity focusing on the mental health and wellbeing of those who work and volunteer in the social sector.

*Our team can introduce clients to the Benefolk network, empowering their success via access to its qualified members.*



## Technology

Next Dimension is a technology-focused company that streamlines processes to ensure your NFP operations are cost-efficient, accurate and compliant. We have the expertise to unlock the potential of data to help you manage the future.

Some of the most valuable tools in our technology toolkit include:

### Some of the Apps we work with:



Beautiful accounting software with an ecosystem of over 1,000 apps



Purchase Orders



Replace petty cash with virtual cards



Extracts data from your supplier invoices





**Next Dimension**  
ACCOUNTING

**We value your interest in Next Dimension Accounting.  
Please contact us for further information.**

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Proudly servicing clients across Australia