

# IDS ANNUAL REPORT

JANUARY 2020 - DECEMBER 2021  
THE COVID YEARS



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# Acknowledgement

“  
*Independent Disability Services (IDS) acknowledges the Traditional Owners of Country throughout Victoria. We pay our respect to Elders past, present and emerging.*  
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# Diversity Statement

*We value diversity and pride ourselves on ensuring our services are inclusive and accessible for all Victorians regardless of ethnicity, gender, gender identity and expression, religion or sexual orientation.*

# From Our Chair



*During 2021, key initiatives have been undertaken to support our renewed focus on delivering the best possible experience for our clients.*



**GEOFF SCHOMBURGK**  
Board Chair

12 months ago, we were optimistically emerging from our long COVID-19 lockdown. Few would have thought that 2021 would be, yet again, impacted by COVID-19 and seemingly eternal lockdowns across Melbourne.

Despite these uncertainties and challenges, IDS has successfully transitioned to an NDIS operating model and continued to provide quality services to our clients. Thank you to our clients and families for sticking with us in these times.

Thanks to the hard work and dedication of the IDS team, we have been able to keep our heads above water financially and report a small growth in service hours and a break even result, with limited government support during the financial year.

To say 2020 and 2021 have been a year of challenge and change for IDS is an understatement. Whilst navigating through the challenges of a COVID-19 world has been a priority for both Board and management, the Board has also been looking forward and positioning IDS for growth in a post COVID-19 environment.

In early 2021, the Board undertook a strategic review and developed a strategy for sustainable growth. During 2021, three key initiatives have been undertaken to support our renewed focus on delivering the best possible experience for our clients:

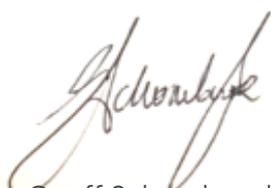
- 1. Detailed cultural review of the organisation**
- 2. Continued investment in customer journey mapping**
- 3. Investment in new client management system, Visual Care.**

The cutover to Visual Care is already showing tangible benefits and we are confident that all of these investments will make IDS a great place to work and enable the team to deliver even better experiences for our clients.

There have been a variety of staff changes throughout the year, including the departure of CEO Renzo Sgarbossa in August 2021. On behalf of the Board I would like to thank Renzo for his contribution over the last 2.5 years to guide IDS through “the COVID years” and we wish Renzo the best for the future. One of the key tasks for any Board is the appointment of a CEO and we were delighted to welcome Sylvia Rosemond as our new CEO in October 2021. And of course we are indebted to Cheryl Lardner for her contribution, not only to our Client Journey Mapping initiative, but for stepping in as Interim CEO.

At the Board level, April this year was a busy month when we welcomed Nadia Mattiazzo to the IDS Board and Jeff Bye as our external FRAC member. Both Nadia and Jeff bring significant skills and experience to our Board. After 4 years, including a 3 year term as Chair, John Baker has decided to leave the IDS Board. We thank John for his unwavering commitment to IDS and his leadership through some challenging times and wish him all the very best in life beyond IDS. Finally, I would like to thank the whole Board for their professionalism, positive energy and support during 2021. In trying and dare I say “unprecedented times”, we have maintained effective governance and taken bold steps to create a positive future for IDS and our clients in the years ahead.

We look forward to building further momentum into 2022.



Geoff Schomburgk  
Chair, IDS

*The cutover to Visual Care is already showing tangible benefits and we are confident in delivering even better experiences for our clients.*

## From Our CEO

I am delighted to join the IDS family and work with such a dedicated team and board to deliver the best possible services to our clients.

I have had the pleasure of meeting many clients through visits and meetings, and at the IDS end of year celebration held at our head office in Carlton. This event gave quality time with many clients and support workers and I look forward to upcoming events like these in the future.

Since commencing in my role I've had many highlights such as a productive strategic forum with the board and leadership team in December, cementing a collaborative approach and understanding of "Who IDS is", "What we do" and "Where we want to be". It confirmed our commitment to deliver a high level of care to clients, and supporting our exceptional staff, whilst also ensuring the organisation meets industry requirements and leads through innovation and progressive thinking.



**SYLVIA ROSEMOND**  
Chief Executive Officer

Another highlight was the launch of our Client Management System, Visual Care. This state of the art, Australian made technology provides IDS with a single point system that manages client and staff details, enabling us to have live accurate information to make informed decisions and better plan for daily activity and future activity.

Complementing this is the app vWorker, all part of the suite of Visual Care capabilities. The app extends to our outreach workforce of dedicated support workers allowing for a streamlined approach in the management of client support, use of maps and communication to the client services team, all in the palm of their hand.

*The IDS team embraced the new technology, and the implementation ran smoothly with little disruption or even hiccups.*

Often the move to new technology presents many transitional difficulties, however the IDS team embraced the new technology, and the implementation ran smoothly with little disruption or even hiccups. This was largely due to months of planning from the board, management, staff and external consultants in a collaborative approach to minimise disruption to staff and clients.

I am confident that IDS, under the leadership of the board has the right people in place to deliver a premium service to our clients whilst using technology to bring the organisation to the next level while meeting the changing needs of the industry and growth.

## Our Purpose

*We aim to empower people, enriching their quality of life. Our vision is for people with disabilities to have the support they require to live the life they want*

# Our Values



## **CLIENT CENTRED** "This is about me."

We will support, engage, and connect with you because we will take the time to truly know and understand you.



## **PROVIDE OPPORTUNITIES** "I don't know what I don't know, share what you know."

From actively listening to you, we will discover what you don't know and assist you in learning new things and participate in activities.



## **CHOICE & CONTROL** "I know what I want, ask me."

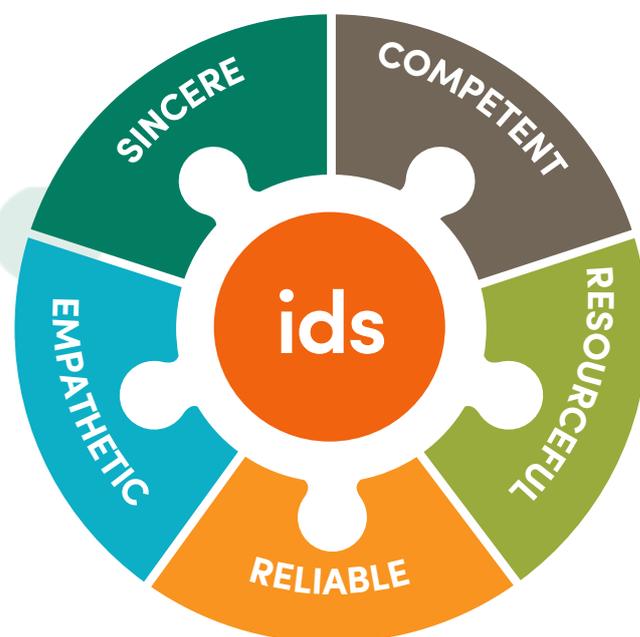
We will discover the things you know and the things you would like to know. We won't make assumptions on your behalf or cast our opinions on to you.



## **RESPECTFUL** "I am your equal, treat me that way."

We strongly advocate human rights for all people. We will partner with you to support you to live as you choose.

# Our Character



## COMPETENT

Having the necessary ability, knowledge, or skill to do something successfully.

## RESOURCEFUL

Having the ability to find quick and clever ways to overcome difficulties.

## RELIABLE

Consistently good in quality or performance, able to be trusted.

## EMPATHETIC

Showing an ability to understand and share the feelings of others.

## SINCERE

Free from pretence or deceit; proceeding from genuine feelings.

# What We do

Independent Disability Services Inc. (IDS) offers a range of supports and services to people with a disability. These cover five key areas of support:

**Domestic Support** - The support our clients need to run their household

**Personal Support** - The areas of support our clients need personally

**Community Access** - Connecting our clients to the world outside their home

**Recreational Activities** - Bringing clients together to enjoy shared experiences

**Support Coordination** - Provide the person to bring all of this together



# The Board of IDS



**GEOFF SCHOMBURGK**  
Board Chair



**MICHAEL ROYAL**  
Treasurer and  
Chair of FRAC



**VIKKI CUMMINGS**  
Chair of Governance  
Committee



**JENNY CATO**  
Deputy Chair



**JOHN BAKER**  
Board Member  
*(Ceased in Nov 2021)*



**NADIA MATTIAZZO**  
Board Member



**RICHARD LEE**  
Board Member

# IDS Sub-Committees

## Finance, Risk, Audit & Compliance Committee

The Finance, Audit and Risk Committee meets regularly throughout the year; normally monthly. Our goals include ensuring that all relevant risks to the business and operations of IDS are identified, estimated and 'risk rated' in terms of probability and severity.

The last year has seen some incredible challenges but throughout these challenges, we have steadily worked on improving our processes so that IDS remains a viable and sustainable operation.



**MICHAEL ROYAL**  
Chair of Finance, Risk, Audit & Compliance Committee

## Governance Committee



**VIKKI CUMMINGS**  
Chair of Governance Committee

The Governance Committee was established in 2020 consisting of 3 Board Members and our CEO. The committee meets bi-monthly and reports back to the full board at monthly board meetings.

In our first year we established an 'Annual Board Work Plan' addressing areas of the organisation for the committee to review throughout the year which covered;

- o Policy and Procedure review
- o Constitution Review

Our goal as the Governance Committee is to implement and assist in providing good governance practices for the organisation at Board level alongside the CEO to provide support with the day to day running of IDS.

# The IDS Way

## Our Clients

Our clients are the people we support and are men, women, and children with a disability.

They are at the centre of everything we do and the decisions that we make.

No two people with the same disability experience their disability in the same way. When you are a member of the IDS Team, you are a vital support for these people, and you are an essential part of their journey.

Together we enable our clients to feel:

**Heard, Safe, Supported & Confident**



## Our People

To consistently deliver 'Awesome Client Experiences', we know that our people must also enjoy an awesome 'employee' experience.

Therefore, we work towards creating an environment that enables our people to prosper in personal and professional growth with good health and wellbeing. We believe that a positive working life paves the way for an overall positive life.

For this reason, we have a set of values, a character profile and strategic plan that help to continually contribute to creating such an environment.

Working together as a team we will feel:

**Heard, Safe, Supported & Confident**

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# Covid Years in Review

## 2020

When COVID-19 first hit Australian shores in early 2020, no one was clear on exactly what was going to happen and how bad it could get. Here at IDS we were very concerned, as many of our clients are vulnerable and require support that involves close personal contact. IDS was quick to source PPE, and the team spent a lot of time learning about infection control and rolling out training to all our staff. This led us into an even bigger year, 2021, the year of the vaccination mandate.



## 2021

Our approach to this situation was ..."let's just get it done for the clients". We have managed to deliver services safely to many clients with a positive COVID-19 result as well as support other agencies that had no staff – this has built a great partnership between us.

With the constant updates from DHHS and Vic Services – every day was a challenge to advise the field staff of the correct instructions that were coming constantly. Our staff were able to respond with a 'gusto attitude' which made it easier to handle. Our clients were not left unattended.

Introducing our Staff Forums was a challenge. We were only able to hold one meeting as COVID-19 restrictions on the number of people allowed in a space at one time prevented venues from taking a booking for 50 plus attendees. Then once out of lockdown we were fast approaching Christmas and the timing was not suitable. These are now back in planning for 2022.

# Client Services



**MARCIA HELMERS**  
**Client Services &**  
**Engagement Manager**

Since commencing with IDS in June 2021 there have been opportunities for our operations to improve and reconstruct our service delivery which we have implemented.

We have orchestrated changes for the better in our staffing and client focus.

*We now have a bank of over 90 Disability Support Workers with qualifications and great experience to deliver our services in the best possible manner.*

We now have a bank of over 90 Disability Support Workers with qualifications and great experience to deliver our services in the best possible manner. With the onboarding of 63 new DSW recruits last financial year and 34 new DSW's in the past 7 months we will achieve our targets.

Our clientele is expanding with 122 clients on board (an increase from 82 in June last year) and is indiscriminate in all possible approaches. Additional to this we also had 22 clients receiving Support Coordination, which has now increased to 26 with 9 of the clients receiving services from IDS. We can continue on this route to deliver improved and expanded services for our clients. Recreation, for example is well on the way to becoming an established IDS service!

We have accepted more DSOA clients and also TAC along with Workcover. There are not high numbers in these bands, but our par excellence reputation is definitely spreading in the sector.

Opportunities for staff progression has seen Naima come from the field into the Office as a Service Coordinator, she is an asset to our team.

The future for IDS and it's clients is bright and 2022 is the year we realise how to successfully live in the new 'COVID-19 normal.'

# Client Story

## Meet Sam!

Sam is one of IDS's longest standing clients and has a team of dedicated Support Workers around her. We sat down with Sam to ask a few questions:

### 1. What do you want to happen in 2022?

Simply, just a better year all round, my son died last year he was 30 years old. He has kids and they have gone to their Aunty. Life is always challenging and I'm looking forward to less of them this year.

### 2. How do your Support Workers help you live the life you want?

I don't know what I would do without them. I can't get out of bed without them. They give me so much relief. If they don't arrive, it's very distressing.

### 3. What is your favourite part of the day?

Hearing the front door open with my Support Worker walking through the door to help me start my day.

### 4. What is something you never get tired of doing?

I never get tired of having my IDS people with me and having them around, they are angels. And, I maybe shouldn't say this, but I am a smoker and I do enjoy having a ciggy!

### 5. What should others consider doing to make the world a better place?

Be kind to each other. So much going on in the world. Just be kind. Like Andrew, the gentleman going around in his tinny in the flooded areas of Australia saving people and their animals. And speaking of animals, it would be good if people could be more like dogs, very loving.

### 6. What are 3 things that make you happy?

Most important is talking to my late son. Then you can't go past a good roast, especially pork with crackling and my guilty pleasure, having a ciggy!





## Our DSW's

**Our 80+ front line Disability Support Workers are in many ways the backbone of IDS.**

**We asked four of our DSW's, how do the IDS values guide you?**

### **David H - 'Client-Centred'**

At IDS there are four Core Values, one of which is 'Client Centred'.

As a DSW I utilise this Value as an essential support strategy for all of my clients. With a 'Person Centred Approach' a connection is achieved which results in a thorough understanding of my Clients needs, wants and aspirations.

In turn this ensures a high standard of service delivery via Client engagement, participation and empowerment.

### **Ayen - 'Respectful'**

Respecting clients for the people they are, the way they live and the choices they make as an individual has had a positive impact on me as a support worker. They are facing difficulties and challenges and we respect them as a person and respect their every decision regarding their care and how they want to be cared for.

I've found that it has built a strong and positive relationship between me and our clients because they can see I respect them in every way as a human being.

### **Alison - 'Choice & Control'**

Working as a DSW for IDS allows me the opportunity to support clients to have choice and control over their goals and live the life they want to live. I am able to inform clients of choices available to them which allows them to be in control and feel empowered. Over the past few months and after working closely with a client to make informed choices to achieve his goals, I have seen a great change in his mental health and overall outlook on life.

### **Pratik - 'Provide Opportunities'**

I engage with clients to understand their goals, aspirations and interests and how I, as a support worker, could assist them to pursue those. I also share my interests and activities or events that I know of and bring them along to experience new things or learn new skills.

# IDS Head Office



**ELLEN**  
Finance Assistant



**CHRIS**  
Finance Manager



**CB**  
Office Manger



**SYLVIA**  
Chief Executive  
Officer



**DEB**  
Services  
Coordinator



**SARAH**  
Human Resources  
Admin



**MARCIA**  
Client Services  
Manager



**ILE**  
Support  
Coordinator



**NAIMA**  
Services  
Coordinator



**CHRISTEL**  
Support  
Coordinator

# IDS Head Office

## Chris

Oversees IDS' finances, and is one of the longest serving team members at IDS and has incredible insight into the disability sector.

## CB

Our allrounder, managing the office, often being the first contact over the phone and oversees special projects. If you need anything in the office or in the field we turn to CB.

## Christel

New to the team working alongside Ile in Support Coordination and also assists clients service when needed, demonstrating her versatility. Christel also brings a wealth of NDIA knowledge to support our clients.

## Deb

Leads our rostering and service agreements team. The joyful voice DSW's and clients hear on the other end of the phone finding solutions and supporting our remote team and our clients, working hard to meet our their needs.

## Ellen

Assists Chris with all things finance and also has been at IDS for quite some time. She is a valued team member and supports the whole team in many different ways.

## Ile

Our courageous specialist support coordinator who puts the needs of clients at the forefront. He thinks outside the square and has a high level of NDIA expertise.

## Marcia

Brings with her a wealth of expertise having been in the sector for over 20 years. Marcia leads the client Services team with passion and dedication always focussed on the client and well being of staff.

## Naima

Recently joining the team and is completing her bachelor of social science. She brings her kind approach to assisting clients and communicating with support workers and enjoys bringing innovative ideas to help others.

## Sarah

Our very new HR Admin incumbent with expertise in recruitment, onboarding and administration, we are all looking forward to getting to know her better.

## Sylvia

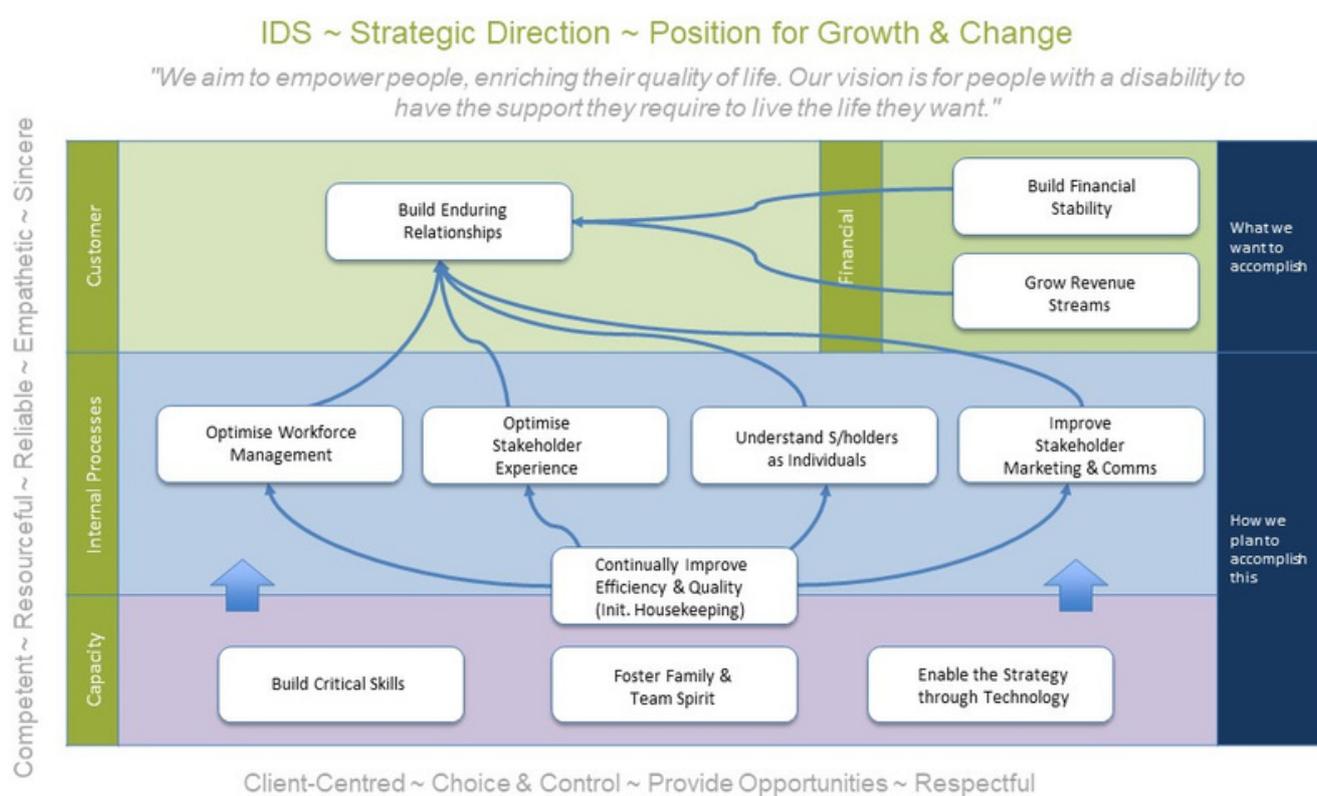
Our new CEO, who enjoys working with the vibrant IDS team and Board, leading the team to engage in continuous improvement and develop innovative ideas to support clients and staff.

# Strategic Execution Plan

At IDS, we acknowledged that we had experienced some good growth. The kind of growth that requires consideration to be paid to the direction and objectives of the organisation. And so in 2021, with some help from experienced strategists, we embarked on reviewing the IDS Strategic Direction.

Where do you start when creating a strategic plan? The answer was to start with our purpose, the very reason IDS exists. This required having a clear vision of our purpose and knowing that from an operation and Board perspective, everyone was aligned.

Next, we confirmed the IDS values were guiding us toward our purpose. We delved into the world of focus groups and invited clients and carers to join us for a discussion. We wanted to use our clients' words to better understand our values, and we applied the 'voice of the client' to each of our values, as highlighted on page 3.



The 'Strategy Map' above was designed to define the various stages of the strategic direction. From this, we identified a list of tasks, in fact, over 110 of them!

Reviewing our strategic direction has been an invaluable experience for us as an organisation. We still have a way to go to reach the goals we have set for ourselves, and with the ever-growing challenges of the global pandemic, we know that this is a marathon, not a sprint. However many initiatives and actions are well and truly in progress for 2022

# Major Projects & Innovation

## Client Experience (CX) Project

During 2020, right as the global pandemic was to hit, we had already made the commitment to undergo a detailed analysis of our Client Experience, utilising a method called 'Client Journey Mapping'. This methodology inspects the experience our clients go on from end-to-end so we can uncover any areas on dissatisfaction and areas needing improvement.



Part of this process included client focus groups and one to one interviews with a number of Support Coordinators to also improve collaboration with other providers.

This resulted in the development of the IDS Client Experience (CX) Playbook which identified x number of initiatives. Many of which confirmed the need for a dynamic Client Management System (CMS) to be implemented to better improve various stages of the client journey.

It was also evident that to have a consistently positive client experience, we must adopt a positive employee experience. This project also delivered a series of employee initiatives to further improve working with IDS.

The implementation of all findings is ongoing as we commit to a culture of continuous improvement.

# Major Projects & Innovation

## Visual Care (CMS)

With the growth we had experienced at IDS we realised that the combination of spreadsheets and our client management system, Supportability could no longer serve us in the efficient delivery of client services. We sought consultation from Orchard Consultants, and Donna and her team began investigating what might be the best system for our growing needs.



After much deliberation and consideration it was decided that we would implement 'Visual Care'. A dynamic and purpose built Client Management System (CMS) that was Australian designed and made specifically for support service industries.

It was a lengthy and detailed project to create the system that would be just right for IDS. Many workshops, meetings and business requirement discussions were had, and completely through lockdowns, meaning almost 100% of the project was completed virtually.

In August 2021 we successfully launched the 'Support Coordinator' Database, which for confidentiality and in the prevention of any conflict of interest, was developed as a separate entity to the Core Database. In October 2021 we launched the Core Database as well as 'vWorker', the mobile app placing a single point of contact for all interactions into the palm of our Disability Support Workers hands.

And while we are still learning and Visual Care continue to improve the system, we are ecstatic by the result and its ability to streamline our business operations.

# Treasurer's Report



**MICHAEL ROYAL**  
Treasurer



*We see the value of growing our business through social media. We will place our efforts in growing our follower base and engaging our audience.*



The year to 30 June 2021 has been a challenging one, with COVID-19 impacting both our client services and our financial results. Having said that, with Government support, particularly during the calendar year 2020, as well as the ongoing commitment and support of our staff and clients, the business has managed to continue to provide our services at a high level. But, as noted below, we are aiming higher.

In planning for our future to provide the highest level of care and support for our clients and staff, we commenced 2 major but related projects involving an IT systems overhaul and a customer experience and cultural review. Both projects will provide a vastly improved experience for both our clients and staff. Some of these costs were incurred during FY21 and all relevant costs incurred for these projects will be capitalised and amortised over the next 7 years. The capitalisation of these costs is the main reason for the increase in Non-Current Assets from \$22K to \$72K.

For FY21, we generated revenue of \$3.8M which is slightly higher than the prior year (to 30 June 2020 – FY20) of \$3.6M. However, whilst FY20 showed a net profit of \$0.36M, the result for FY21 was break even with a small profit of \$1,637. Changes to the level of Government support plus the ongoing disruptions caused by COVID-19 and the flow-on impact to our business, our clients and our staff, all had an impact on reducing the level of profitability.

We expect FY22 to continue to be challenging and we will be monitoring closely both revenue growth and costs.

Nevertheless, the implementation of the above-mentioned projects is likely to result in significant improvements in both the experience of our clients and staff. Consequently, we anticipate some stronger growth in FY22, albeit with higher costs resulting from the tail-end of COVID-19 as well as the amortisation of the costs of these projects.

The management of cash continues to be a primary focus for the business. Whilst our cash reserves remain strong, the investment in the projects has reduced cash and investments from \$0.79M to \$0.66M.

With the changes to NDIS, we also continue to monitor our Trade Receivables, particularly as intermediaries may be paid the funds for our services from the Government before passing these amounts onto us. This creates a potential debtor risk and it also impacts the timing of some cash receipts.

With our cash reserves and our costs being predominantly employee-related, our Current Account has a considerable surplus over our Current Liabilities – \$0.7M for FY21 (\$0.7M in FY20). However, as noted above, we anticipate this may deteriorate over FY22 due to the expenditure on the projects.

Lastly, our Equity and Net Asset positions remain reasonably constant between FY20 and FY21 at \$0.78M due to the breakeven profit result and no charges against Equity.



Michael Royal

Treasurer and Chair, Audit, Risk & Compliance Committee IDS



# Finances

## Financial Overview

### A Financial Summary Covering 2020-2021

The past two years have been challenging financially, with COVID-19 having a major impact across all areas of IDS. It has also been a period of change and investment, with multiple major projects undertaken. Despite these challenges, IDS was able to deliver a significant surplus in the year ending 30 June 2020, and a small surplus in the year ending 30 June 2021.

The year ending 30 June 2020 began with a focus on obtaining growth in both client hours and client numbers. This growth was achieved up until March 2020, which was when the impact of COVID-19 first began. With the initial lockdown in March 2020, 20% of client hours were lost overnight. Although slow to react, the NDIS and the government did eventually provide some financial support which allowed IDS to maintain a surplus for the year.

The year ending 30 June 2021 was also focused on growth, and was also heavily impacted by COVID-19. In addition, IDS embarked on two major projects requiring significant investment, a software overhaul and a client engagement and cultural review. These projects will allow IDS to position for significant growth. As of November 2021 both these projects are complete with very positive results.

The repeated lockdowns throughout the year did have a significant impact on total client hours, although government support including JobKeeper, allowed IDS to again make a small surplus.

Looking forward, the challenges of the past two years will continue as COVID-19 lingers in the community. Government support has largely ceased and continued growth will be a focus for next year. I am confident in the team at IDS, and feel we are on the right track to thrive in these challenging times.

Chris Beeston  
Finance Manager



**CHRIS BEESTON**  
Finance Manager

# Finances

## Financial Statement

A Financial Statement Covering 2020-2021

|                 | 2021<br>\$ | 2020<br>\$ |
|-----------------|------------|------------|
| Income          | 3,856,201  | 3,643,601  |
| Expenses        | 3,854,564  | 3,278,093  |
| Net Surplus     | 1,637      | 365,508    |
| Total Assets    | 1,070,549  | 1,193,727  |
| Total Liability | 289,860    | 414,675    |
| Net Worth       | 780,689    | 779,052    |

### Financial Position Overview

FY19/20 & 20/21 were challenging years, with the COVID-19 pandemic impacting the organisations financial performance. Despite this, IDS performed strongly in FY19/20, with growth targets achieved up until the start of the pandemic. Adjustments relating to the finalisation of the transition from state funding to NDIS was also a big driver of the net result.

FY20/21 was a year of change with several major projects commenced including a software overhaul. With the help of government support, IDS was also able to achieve a small surplus in FY20/21. Looking forward to FY21/22, IDS is planning for growth in both client & staff numbers as well as an expansion of our service offering.

## Word of Thanks

There is no question, the IDS team has worked tirelessly over the past two years, often going above and beyond their job description to help out where needed. There has been far more work to do due to COVID-19, no one has complained, we have all just got to work. Delivering high quality service to our clients has always been our focus, and we thank you all for your contributions.

To John Baker, our past Board Chair, our utmost gratitude for your contribution to IDS between April 2017 to December 2021. The entire IDS family appreciate your dedication.

We also acknowledge the invaluable contributions towards our 'Major Projects' over the last two years, with special mentions to Cheryl Lardner from Cherry Bamboo, the team at Orchard Consulting, Volunteer Contributor, Lawrence Easton, and Strategist, Bill Butcher.



***"Alone we can do  
so little, together  
we can do so  
much."***

*~ Helen Keller*





Prepared by Cheryl Lardner, Special Projects Lead  
Approved by Sylvia Rosemond, Chief Executive Officer