



# IDS ANNUAL REPORT

JANUARY 2022 - DECEMBER 2022



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*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.*

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



**GEOFF SCHOMBURGK**  
Board Chair

This year has been another busy and productive year for the team at Independent Disability Services (IDS). COVID seems to be behind us, finally, and life seems to have returned to a new normal, although the threat of disruption remains.

During the year, the focus of the Board and management team has been on executing our strategic plan. And we have made very good progress.

- Our client management system, Visual Care has been implemented and is making a positive impact on staff and clients alike.
- We have restarted our recreation program after a brief break.
- We established the Client & Carers Engagement Group as a critical forum to get feedback on how we are delivering services and a source of ideas on how we can improve.
- We held the inaugural Service Excellence awards in April, and again, I congratulate Deb Williams and Alison Kent as the inaugural winners. This is an important initiative to formally recognise the outstanding work of our Disability Support Workers (DSW) and office teams. I look forward to a new group of winners again in 2023.
- An invitation for two of our DSWs to attend a Christmas lunch at Government House (a function to recognise those working directly with people with disability) is fantastic recognition of IDS in the sector.

## From the Chair

*Our client management system, Visual Care, has been implemented and is making a positive impact on staff and clients alike.*

“

*We have grown our client base and our service hours delivered are above pre-COVID levels.*

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Our investment in people and technology is showing benefits. We have grown our client base and our service hours delivered are above pre-COVID levels. Sylvia Rosemond and the whole IDS team are to be commended for their efforts in moving IDS forward.

Financially, we grew our revenue by nearly 10% and managed to break even in our operations but reported a small overall loss, due to our strategic investment in the Visual Care implementation project. Our financial position is solid and the Treasurer’s Report outlines our financial performance during the FY 21/22 in more detail.

Whilst we have achieved a lot, there is still much to be done. There are new challenges ahead with inflation, rising interest rates and high energy prices all placing pressure on our staff and clients. We understand that many service providers are struggling in this environment, but IDS remains strong and committed to supporting our clients and families.

The NDIS environment has received a lot of attention, some good, some not so good. The appointment of Kurt Fearnley as chair of the NDIA is a positive move for the sector. And with increased funding and a stronger NDIA representing people with disability, there will be further opportunities for IDS to grow and evolve.

The Board and management team have reviewed and fine-tuned our strategy for the period ahead in light of these challenges and opportunities, whilst continuing to support the IDS family along the way.

Finally, I must recognise the effort and support of all Board members. I am extremely proud of the breadth of capability and experience that the Board members bring to the governance of IDS and their commitment and passion for the success of IDS is infectious.

We have much more to do and I am excited to continue this journey into 2023.



Geoff Schomburgk  
Chair, Independent Disability Services

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## From the CEO



**SYLVIA ROSEMOND**  
Chief Executive Officer

2022 started as a strong year, with a clear strategic plan in progress, a cohesive board and a dedicated management team and staff. During 2022 IDS has celebrated milestones, including new service streams, recognition programs, an increase in the client base and increases in revenue.

IDS has also had some challenges. Whilst continuing to navigate COVID, challenging economic environments, and a new Federal Government, IDS has finished off the year in a strong position and is ready to continue to build on service delivery.

From a political perspective, the new Labor government instigated the early commencement of the NDIS review and increased funds available for the scheme as part of the budget.

*“IDS will continue to focus on areas of improvement in particular those highlighted by clients, carers and staff.”*

We look forward to reading the outcomes of the NDIS review expected in late October 2023. Also in 2022 a significant legal case heard in the federal court clarified the definition of accessibility of the NDIS making the scheme available to more people.

As an organisation, IDS has demonstrated resilience, motivated by the team's client-centred approach to everything we do. IDS continues to prioritise safety for clients and staff and will continue to seek improvement. This ongoing focus of the Board and management is regularly reviewed.

Visual Care and vWorker have been implemented for just over 12 months. This has significantly improved the communication between the office and support workers, enabling staff to communicate via messaging, log in and out on an app, and have real-time access to rosters and available shifts.

Further, the rollout of the Client Portal and vAboutMe for carers and clients will occur in early 2023.

The app will provide an additional resource that enables clients and carers to have accessible information via their computers and phone.

This will include rosters, worker profiles, the ability to request support and another avenue to provide feedback.

As we move into 2023, IDS will continue to focus on areas of improvement in particular those highlighted by clients, carers and staff in order to improve our services and continue to listen to valued feedback.



I would sincerely like to thank the IDS team, who, through hard work and dedication to clients, continue to provide quality support. In particular, IDS support workers whose support enables clients to do what most of us take for granted – such as shopping, accessing the community, personal care, seeing family, companionship and reaching goals.

IDS support workers are an invaluable part of our team and we've been fortunate to have been able to individually recognise some of the outstanding work going above and beyond in their role and being IDS heroes. We look forward to continuing to recognise IDS support workers in 2023.

The head office team and management have continued to maintain the engine room overseeing compliance, admin, PPE distribution, training, safety, recruitment, finances and rostering, to name just a few critical parts of their role.

The IDS Board's ongoing commitment to the success of IDS and ensuring clients receive the support required has continued throughout 2022. The board review the risk and strategic direction of the organisation regularly.

*Supporting clients to reach their goals and providing the right support – IDS will continue to be a provider of choice.*

I'd like to recognise the support of the board and their commitment to ensuring their skills align with the needs of the organisation and their openness to feedback through bi-annual pulse surveys, and their oversight of the client engagement priorities.

No doubt there will be challenges in 2023, but with the fantastic team at IDS who are client-centred, driven and understand the importance of supporting IDS clients to reach their goals and providing the right support – IDS will continue to be a provider of choice.

In 2023 IDS welcomes the outcome of the NDIS review and the opportunity to build our reputation as an organisation that meets regulatory requirements and continues to be trusted and reputable.

We will continue to focus on recruiting and retaining the right people who are client-centred and align with IDS's vision and mission.

*S. Rosemond*  
Sylvia Rosemond

CEO, Independent Disability Services

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## 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.*



# The IDS Board



**VIKKI CUMMINGS**  
Chair of Governance  
Committee



**GEOFF SCHOMBURGK**  
Board Chair



**JENNY CATO**  
Deputy Chair



**MICHAEL ROYAL**  
Treasurer and  
Chair of FRAC



**NADIA MATTIAZZO**  
Board Member



**RICHARD LEE**  
Board Member



**JEFF BYE\***  
Board Member

*\*Jeff was appointed to the Board in Feb '22  
Read about Jeff on page 35.*



# Sub-Committees



## Finance, Risk, Audit & Compliance Committee

MICHAEL ROYAL

Chair of Finance, Risk, Audit & Compliance Committee

IDS operates in a highly regulated and controlled industry. One of the Board's key goals is to ensure the ongoing viability and sustainability of IDS within this environment.

The Finance Audit and Risk Committee (FRAC) was set up to ensure this goal is met in the context of the risk environment in which we operate. The FRAC meets regularly throughout the year; normally monthly. We consider risks from the perspective of both financial performance (profitability and cash flow), as well as operational performance.

As has been the case since 2020, we continue to experience complex and difficult challenges, tempered by some incredibly exciting opportunities. Together with the management team, who have a critical role in ensuring the ongoing viability of the business, the FRAC continues to monitor and address the various areas of risk.

Of specific focus each year is our review of those risks identified by the FRAC and also our external and internal auditors who have reviewed the business over the past year. We supplement these reviews with feedback from both our customers and employees as our customers and employees are the key drivers of our future financial and operational performance.



## Governance Committee

VIKKI CUMMINGS

Chair of Governance Committee

The Governance Committee held four meetings between October 2021 and June 2022, reporting to the entire Board at our monthly meetings.

The committee consists of 3 Board Members Vikki Cummings (Chair), Jenny Cato, Nadia Mattiazzo and IDS CEO Sylvia Rosemond.

As a committee, we continue to update and review the Annual Board Calendar and Workplan throughout the year. This provides the Board and CEO with an overview of all areas of the organisation to be reviewed as the organisation grows.

This year the committee's work included looking at:

- The IDS culture as an organisation
- A skills matrix review of Board members and IDS management
- Policy & Procedure review - at Board and organisation level

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

## Our Clients

Our clients are the people we support, and are men, women, and children living with disabilities.

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

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

Together we strive for our clients to feel:  
**Heard, Safe, Supported & Confident**



## Our People

To consistently deliver 'Positive Client Experiences', we know that our people must also enjoy a positive 'employee experience'.

Therefore, we work towards creating an environment that enables our people to prosper in personal and professional growth 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 a strategic plan that help to continually contribute to creating such an environment and culture.

Working together as a team, we strive to feel:  
**Heard, Safe, Supported & Confident**

## Meet Rebecca, also known as 'Bec'!

With an infectious zest for life, Bec brings a beautiful energy to a room. We asked Bec a few questions to get to know her a little better!

### 1. What are you looking forward to in 2023?

I'm looking forward to this new year of 2023 because last year I heard there is a Client Engagement Group, which I'm very appreciative of and thankful to be a part of. I feel it's important for us as clients to be involved in expressing feedback as I have a strong desire to see people with disabilities being included in every area of life.

Experiencing exclusion is painful and isolating. IDS's support removes that barrier. I was blown away by the international women's IDS dinner last year. It was so beautifully decorated and planned, I'm looking forward to this year. Every woman with a disability felt loved, valued and empowered by Marcia and Deb providing food and drinks to the tables while Sylvia did presentations.

I'm looking forward to going on more recreational day trips to Sorrento on the ferry, Yarra Valley Chocolate Factory and overnight trips. They are so fun and great! I remember my first overnight trip to Kryal Castle near Ballarat, I was nervous because that was my first time away from home. However, once it started I felt nervous no more and love going on them now with the amazing dedicated support of the office staff who make these trips happen.

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

My support workers help me live the life I want as they give me choice and control over what we do, including the amazing loving supportive caring IDS office staff when I call they are always helpful and cheerful.

## Meet Client Rebecca



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# Meet Client Rebecca



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

Eating dinner! I get to enjoy a full plate of yummy food before I'm ready to head to sleep as finding food during the day can be difficult with food allergies to dairy, milk and egg. I do my best to find things even though it is challenging at times.

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

I never get tired of living by faith in God. That has helped me get through all the trials over the years being in and out of the hospital, I got to see how precious life is.

I love doing my best to smile and to make others smile. I'm grateful for what I have - my family and my friends. IDS have become a big part of my life too. The opportunities and supportive care and generosity I'm very thankful for as last year was excruciating for me with some sad circumstances that rocked my faith and beliefs. I know now it is for the best as it has made me a stronger, confident woman helping me find myself again.

I'm the woman who loves wearing my favourite clothing brand GUESS and I love wearing pink. For a few years I was unable to feel myself but now I know I wouldn't compromise who I am again.

I also never get tired of spending time with my beautiful cat Princess Maggie who is the most affectionate cat I have ever owned. I rescued her from a veterinary clinic that I was able to work at before my health declined. She had a badly broken leg requiring pins and rods in place and needed extensive care for 6 months in the veterinary hospital. I formed such a bond with her and I was able to take her home.

I also never get tired of riding around on my mobility scooter it gives me independence and I can travel long distances - I love it! IDS and Ile really helped me with the approval application I honestly struggle when I do not have it.

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# Meet Client Rebecca

## 5. How can we all make the world a better place?

I strongly feel we can make the world a better place by being filled with love, hope, joy and peace.

Being inclusive around people with disabilities, enabling them to advocate for themselves and have a voice in the ways they are able to best communicate and to think and feel like others who don't have a disability. We are all still humans and love to be cared for, supported and included. We still have a lot of kindness and love to give.

It would be great to make the world a better place by having more disability-friendly accommodations and hotels with accessibility. Wider doors to move around and bigger lifts in hotels and restaurants and to not have so many stairs or steps.

I feel this very important for every mode of public transport to have disability access as from my experience using a mobility scooter, not all trams and places are accessible which can be frustrating and cause a feeling of exclusion.

For our Maxi cab drivers to have more understanding, patience and kindness towards people with disabilities. And it would be nice to have more food places allergy friendly being allergic to dairy, egg and milk.

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

1. Going to the city with my scooter. I like the movies, karaoke and shopping!

2. Making others feel valued, loved and making them smile.



3. Listening to my worship music at church on Sundays. And I love animals.

# Client Engagement Report

“IDS invested substantially in training during the year ensuring all our staff met the NDIS compliance requirements.”

The Client Services team has had a lot happening in the last 12 months. The team continues to be amazed at how much progress we are making in many ways. We have a number of staff moving into different roles as well as new office staff and DSWs coming on board, making client services a very active team. You can read more about this in the Client Services Report from Deb Williams on page 19.

Our clients experienced a collection of recreational activities in 2022, including festivals at Fed Square Music, a Hanging Rock Picnic and Market Day, as well as a trip on Puffing Billy to name a few. Many clients enjoyed overnight trips that took our groups to Daylesford where Horse Riding was a wonderful new experience. The Queenscliff Ferry Trip & Bay Tour was well received, as was the Alexandra Hot Rod & Truck Show. An overnight stay at Kryal Castle was a much-loved activity.

Alongside of this, we have organised some individual interstate holidays for clients accessing their NDIS funding under SDA guidelines with excellent results for our clients who all had great times full of fun. Our Recreation took a short break and commenced again in November with day trips and overnight trips again. A 3-day visit to Sorrento was “one of the most enjoyable trips” as quoted by one of our clients.



**MARCIA HELMERS**  
Operations &  
Engagement Manager



\*Client enjoying an IDS event



\*Client and DSW at Ten Pin Bowling



\*International Women's Days



*\*Client enjoying Kryall Castle*



*\*Client at Strawberry Picking*



*\*Clients enjoying a spot of fishing*

IDS invested substantially in training during the year ensuring all our staff met the NDIS compliance requirements. This was supported by the implementation of a new training portal, 'eTrainu'. Additionally, high-level training was rolled out for those DSWs that work with our more complex clients, to ensure that we deliver best-practice services. The Board and staff have completed training throughout the year to gain a greater skill set.

IDS welcomed student placements who were completing their placement hours at IDS's head office. Two were students completing social work degrees, and one studying for a diploma in community services. This young team of people were a delight to have in the office and brought a wealth of knowledge and enthusiasm. Collaboration between the office team and the student team was very beneficial for clients.

Also, the Client Services team conducted four DSW Forums across the West and in the East with good attendance. Our students presented at the Forum on 'OH&S', 'Policies & Procedures', 'Dealing with Complaints' and 'Incidents & Feedback'. This was well received by the DSWs with feedback given to the office staff. A transfer of information sees all involved a little wiser for the better.

The management team also had some changes as I moved to 'Operations and Engagement Manager' and Deb Williams was promoted to the position of 'Team Leader - Services'. I will be concentrating on Marketing, Recreational Activities and Client Engagement. I look forward to another exciting year in the IDS services and engagement space.

## Ten Highlights of 2022

1. The inaugural 'Chair's Service Excellence Awards' in April awarded to two staff members in recognition of their work
2. Diversifying the IDS client base notably saw an increase in complex clients
3. Consistent recruitment of support workers in a challenging market
4. Implementation of the 'Recreation Activities' program
5. The increased utilisation of Visual Care and vWorker to streamline IDS's Client Management System (CMS) and increase client support
6. Implementation of a dynamic Marketing Strategy
7. Move to a new spacious office
8. Launch of the inaugural 'Student Placement' program
9. After-hours support moved internally and provided by IDS staff
10. A deliberate and significant increase in staff training.





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# Quality, Risk & Compliance Report

“  
*The Client & Carer Engagement Group will help lead our service responsiveness to all our current and future clients.*  
”

As a registered provider for the National Disability Insurance Scheme (NDIS), Independent Disability Services (IDS) regularly undergoes external quality audits for NDIS.

As part of that audit in November 2022, some of our clients and carers spoke to the auditors to give their feedback about IDS:

“Terrific, we love him” (the client’s support worker)

“We get to choose what he wants to do” (family of client talking about community access)

“Very happy with the carers, it was a bit of a relief to transfer over to the organisation”

“Support coordination is great”

“I’m very lucky to receive the service”.

At IDS, we are committed to our values of being client-centred and respectful, providing opportunities and choice and control. It is encouraging to receive feedback through the audit of our lived values in practice.

The Board is committed to participation and feedback from people with disabilities. The IDS family includes Directors and staff with lived experience. The development of the Client and Carer Engagement Group (C&CEG) to provide feedback directly to the Board is an example of that commitment.

The IDS Board and executive team focused on improving our service quality to all our clients. The C&CEG will help lead our service responsiveness to all our current and future clients.



**ANDREW KAULER**  
Quality, Risk &  
Compliance Manager

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In 2022 IDS reviewed our risk management processes to ensure the safety of our clients and staff whether in home based or community based support. IDS has also redeveloped the emergency planning and disaster management policy and procedure so that it's not just focused on COVID-19. IDS has also introduced new ways to receive complaints and feedback from clients so that we can act on any issues earlier.

In 2023 IDS will reach out to all our clients to develop individual emergency management plans, review risk management and home safety requirements, and redevelop all our service agreements to include new service and support elements.

As a not for profit, community-based disability support provider, that competes in an open market within NDIS, and still remains a values driven organisation with a purpose to empower people enriching their quality of life – service quality is paramount. This combination of price, quality and service is summarised in the quote below:

*“Being on par in terms of price and quality only gets you into the game. Service wins the game.”*  
– Tony Alessandra.

We look forward to continuing to grow our supportive, responsive high quality service delivery further with all our clients in 2023.



*“Being on par in terms of price and quality only gets you into the game. Service wins the game.”*

# Client Services Report

127 Support  
Workers with  
Diverse  
Backgrounds

107 Clients  
Across NDIS,  
TAC, WorkCover  
& DSOA

After-Hours  
Service Moved  
Internally



**DEB WILLIAMS**  
Team Leader  
Client Services

2022 has seen a tremendous uptake of our new Client Management System, Visual Care, from our support working team. The feedback is that it's made life so much easier for them to be able to complete notes and incident reports in a single application and communicate back to head office in real-time has bridged a communication gap. It has also provided greater visibility to connect with new clients as they are now able to view profiles and see if they are an appropriate fit for the client prior to selecting shifts.

We have grown our DSW base from 80 to 127 active support workers spread across Melbourne and outer suburbs with diverse expertise and cultures, with 33 different languages available to clients. We have 107 active clients receiving services funded through NDIS, Transport Accident Commission (TAC), Work Cover and Disability Support for Older Australians (DSOA).

We have brought our after-hours team in-house, with Karen as the Team Leader. Two of our DSW Bridgett and Abbey, have joined the team also as after-hours coordinators. Having front-line experience in our after-hours team has made a significant difference in how we can better serve our clients outside of business hours.

As well as leading our after-hours team Karen has seized the opportunity to come into the office as one of our Services Coordinators, she joins Carina, who after interviewing for a DSW position, was offered the opportunity to work as a Service Coordinator. Karen and Carina have grabbed hold of this head office opportunity with both hands and are doing a fantastic job in the Client Services team.

# DSW Heroes



The Disability Support Worker team grew to over 130 dedicated employees in 2022.

Often these workers are the unsung heroes providing support to clients to enable them to live the life they want. At IDS we highlight the great work of our front-line employees.

Here's just some of our DSW Heroes.

## **Tony**

An unwavering commitment to providing the best care, no matter the time of day or interruption to his day, even outside of an active shift.

## **Anna**

Will step in when others are unable to. Has great skills and character traits, backed by a dedicated client-focused approach to her work.

## **Fartun**

Demonstrates consistency in her work, and her deep level of care does not simply switch off when her allocated shift is over. A true client champion.

## **Annie**

A heart of gold! Annie is incredibly reliable, even with short notice. She has a solid dedication and devotion to her work and our clients.

## **Korlu**

In her short time with IDS, Korlu has already demonstrated a fantastic work ethic. Client feedback is brilliant, and her skill level means Korlu can work in complex situations.

# DSW Heroes

As well as our nominated DSW Heros, we were also able to be represented, on behalf of all DSWs, at a special event at Government House in 2022.

Her Excellency the Honourable Linda Dessau AC CVO extended a very special invitation to IDS in support of the Disability Sector Service Providers.

IDS were proud to be invited and sent two very dedicated Support Workers to attend lunch at Government House. This was in recognition of the excellent service support workers provide to people with disabilities.



IDS nominated our longest-serving Support Workers David and Evens to attend and represent IDS.

David and Evens have consistently demonstrated dedication and a high level of support to clients and are valuable members of the IDS team and the community at large.

From all reports and the smiles on their faces, they enjoyed the wonderful food and were very proud to be amongst other DSWs who deliver services to our folks living with disabilities.

Thank you David and Evens for representing IDS and your clients.

# IDS Head Office



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# Major Projects & Innovation

## Chair's Service Excellence Awards

Inspired by the findings of our Customer Experience (CX) Project in 2021, IDS launched the inaugural 'Chair's Service Excellence Awards' in February 2022, with the winners announced in April.

The awards will be held annually, recognising the IDS Head Office team, and Disability Support Worker (DSW) team.



*\*Pictured Deb and Alison with their awards*

This is an exciting opportunity for the Chair, Geoff Schomburgk and the IDS Board to recognise and reward outstanding service from team members who have gone "above and beyond".

Criteria for the awards include:

- Excellence in Client Service
- Living the IDS Values
- Innovation or Process Improvement.

For our remote workforce on the frontline, the Disability Support Workers, commonly known as DSWs, the award went to Alison Kent. Alison encourages and supports clients in making their own decisions, enabling clients to have choice & control.

The acknowledgment from the Head Office employees was awarded to Deb Williams in the Client Services Team. Deb is 100% dedicated to the interest of IDS's clients and ensuring they receive the best level of service possible. Deb goes out of her way to ensure that the services are delivered.

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# Major Projects & Innovation

## Student Placement Program

In 2022 IDS completed an inaugural 'Student Placement Program' with 3 outstanding students, Briella, Emily and Harry. These students were mentored by the executive team leaders, Marcia and Andrew, for the placement hours. They were assigned challenging tasks and always rose to the occasion.



**BRIELLA**  
Latrobe University



**EMILY**  
Deakin University



**HARRY**  
Swinburne University of  
Technology

And when asked what they learned from their experience with IDS:

Briella: "I experienced great learning of 'Crisis Intervention & Negotiation' and the skill and techniques required. Communication and being observant are so important."

Emily: "I now have a deeper understanding of the Disability Sector and the NDIS and how it works. The structure of the office was a great learning, and I was able to apply relevant social work theories into practice."

Harry: "I learnt the importance of communication, including the power of observing. I now appreciate the need for structure in an office environment, and I learnt how to call clients and gained first-hand experience doing this."

The Student Placement Program was valuable to the organisation and students. IDS is committed to supporting individuals to reach their goals and looks forward to continuing the placement program in the future.

IDS provides educational support to existing staff and collaborates with staff to complete certificate 4 and diplomas in disability to further enhance their skills to support clients. Further IDS facilitates placement hours to support students completing higher education courses related to social work, allied health and disability.



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# Major Projects & Innovation

## Client & Carer Engagement Group

IDS continues its commitment to continuous learning and improvement. Following a series of Focus Group sessions it was confirmed that for the organisation to flourish, we must work closely with the people we serve. For IDS, this is the clients and carers.

As a result of this the development of a 'Client & Carer Engagement Group' was put into motion. The role of this group will be to have input in five key areas:

1. Reviews of the service model, operational practices, and outcomes, including feedback received
2. Development of service delivery strategies and activities, including identifying gaps and needs
3. Development of marketing and communication strategies
4. Planning and evaluation of quarterly surveys and forums/focus groups
5. Development and review of the IDS strategic plan.

The group will meet four times a year, operating under a formal 'Terms of Reference' approved by the Board, with findings from the group presented to the Board following each meeting.

At the time of this report, they had gathered for the inaugural meeting where members had the opportunity to meet each other, review the terms of reference and decide on the goals of the group.

The Client & Carer Engagement Group is being led by Board Directors Nadia Mattiazzo and Richard Lee. New member acquisitions will be encouraged each year.



# Strategic Plan Review

After 12 months of working collectively towards the key objectives of the Strategic Plan, it was time to regroup to acknowledge what had been achieved and review the strategic direction and to identify incoming challenges and opportunities.

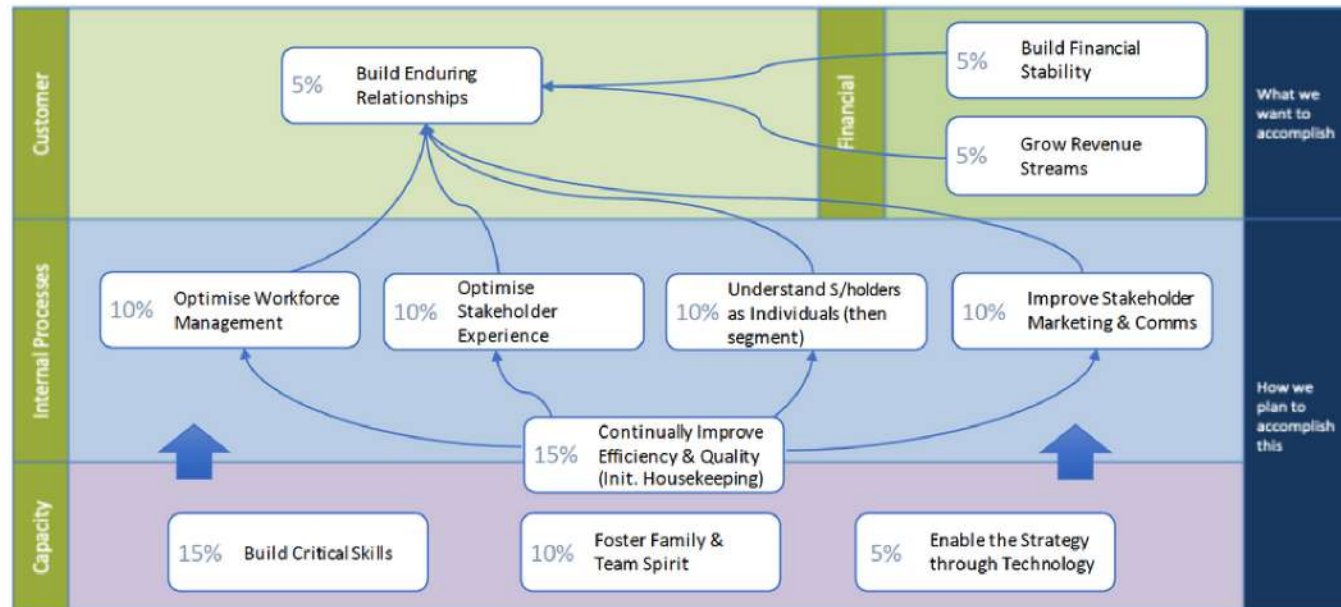
In December 2022, senior management and the IDS Board gathered together to flesh out the current and future state of IDS. The Strategy Day activities started with a closer review of the Focus Groups feedback, where three key areas were examined. The quality of support workers, recruitment screening processes and the commitment to capturing client and carer feedback most effectively.

High-level outcomes were mapping out the entire 'Employee Experience (EX)' to discover required areas of improvement, hiring a People & Culture Manager to enhance the human resources function and introducing a higher level of client engagement with a 'Leadership Team Connect' program.

## IDS ~ Strategic Direction ~ Position for Growth & Change

*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*



The day then moved to a PESTEL activity. Through this activity, we could pinpoint any impact that IDS will likely face in the next 12 months by looking at political, economic, social, technological, environmental and legal factors.

From this point, we could define the key areas of focused outcomes to be interlaced into the Strategic Plan.

1. Develop and Maintain Trust
2. Leverage Visual Care
3. Client Matrix Review
4. Establish a Clear Point of Difference
5. Foster Clear & Timely Communication
6. Improved Workforce Planning
7. Build Desired Culture.

# Treasurer's Report

The fiscal year to 30 June 2022 (FY22) continued the recent trend established in FY20 and FY21 of disruption to the business caused by COVID.

The good news is that despite these headwinds, Independent Disability Services (IDS) has continued to show strong growth in revenues from the prior year – up from \$3.2M to \$3.6M with further growth anticipated in fiscal year 2023.

The strong revenue growth combined with an improved margin improved the Gross Margin by \$220K.

This improvement in margin was largely offset by the investment in our Information Technology systems. The Board had planned for a major upgrade project of our operational and customer interfacing IT systems and this was completed over the FY22 year.



**MICHAEL ROYAL**  
Treasurer

*“IDS now undertakes greater scrutiny to make sure that the services it provides its clients are within the scope of each client’s agreed NDIS service agreements.”*

These projects were also covered in the Treasurer’s Report for last year. However, in last year’s Report, it was anticipated that these costs could be amortised over 7 years and that this was consistent with the Accounting Standards. However, we have been advised this year by our Auditors that the Accounting Standards now require these IT costs to be expensed in the year they were incurred. As a result, these expenses have had an adverse net impact compared to the prior year (FY21) of \$170K.

Another significant and material variation between FY22 and FY21 was the income funding support paid to IDS from Covid-related Government support packages. In FY21 IDS received \$370K and in FY22 IDS received \$115K.

The overall net impact of these transactions; that is the improvement in revenue from services to our clients, the improvement in margin, the higher IT costs and the lower level of Covid-related Government support provided resulted in a net loss of \$210K compared to the prior year of a small \$2K net profit.

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From the net loss incurred, the balance sheet has not moved significantly other than operational movements in working capital. The Board continues to monitor working capital requirements and in particular, Trade Receivables and Payables. There are no issues of note for disclosure.

With respect to Trade Receivables, whilst there are one-off impacts from clients where funding is not received on the contracted basis, none of these instances have been material. Further, whilst there has been delays in receipt of some funds from the NDIS providers, this has been able to be resolved through discussions with these NDIS providers. However, as a result of the changing landscape with NDIS, IDS now undertakes greater scrutiny to make sure that the services it provides its clients are within the scope of each client's NDIS service agreements. Whilst there have been no major variations noted, it is an important area of control which was identified during the year and which is now able to be better managed with the new IT systems in place.

  
Michael Royal  
Treasurer and Chair, FRAC IDS



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# Financial Overview



**CHRIS BEESTON**  
Finance Manager

## Financial Summary Covering FY 21-22

2021-22 was a year of investment with IDS completing a major software overhaul in November 2021. This impacted the net result with the total project costs recognised in 2021-22.

COVID also had a significant impact, with the lockdowns from August to October 2021 heavily impacting service levels and financial performance. Despite these challenges, once the lockdowns were lifted, we saw significant growth from November 2021 to June 2022.

The new software system was a major factor in allowing this growth as we found many efficiencies across the organisation. Government support was lacking throughout the initial COVID lockdowns, with JobKeeper and other programs ending. This was somewhat rectified in June 2022 when a one-off payment was announced to help registered NDIS organisations meet their quality management, compliance and software improvement costs. This payment was also to acknowledge the lack of government support previously. IDS welcomes the increased government support of the NDIS.

Looking forward, growth and improvement in service delivery are a focus. Although 2021-22 saw a significant loss, this was mainly due to software investment costs. IDS has been reporting a healthy surplus through the first half of 2022-23, which is expected to continue. I am confident in the team at IDS and feel we are well-placed to grow and continue to provide a high level of service to our clients.

As we do each year, Seward Dawson conducted a full audit of IDS and the Management Letter features on the next page.

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# Financial Management Letter

Board Members  
Independent Disability Services  
Suite 3.01  
Level 360 Leicester Street  
CARLTON VIC 3053

Dear Board Members

## Independent Disability Services - Management letter for the year ended 30 June 2022

We have completed the audit work for Independent Disability Services for the year ended 30 June 2022.

This letter summarises a number of matters to be considered by your leadership team together with our recommendations for improvement.

We are pleased to report that we have had the co-operation of your staff and full access to records as we have undertaken our audit procedures. We would like to express our appreciation to management for their assistance provided during the audit process. We look forward to working with the Independent Disability Services in the future.

Should you have any queries please feel free to contact one of the team members.

Yours sincerely



Jeff Tulk  
Partner



Calvin Ho  
Team Leader



# Financial Statement

## Financial Statement Covering 2021-2022

	2022 \$	2021 \$
Income	4,219,551	3,856,201
Expenses	4,430,487	3,854,564
Net Surplus	-210,936	1,637
Total Assets	962,367	1,070,549
Total Liability	392,614	289,860
Net Worth	569,753	780,689



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# 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.



## 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.



## 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.



## RESPECTFUL

"I am your equal. Treat me that way."

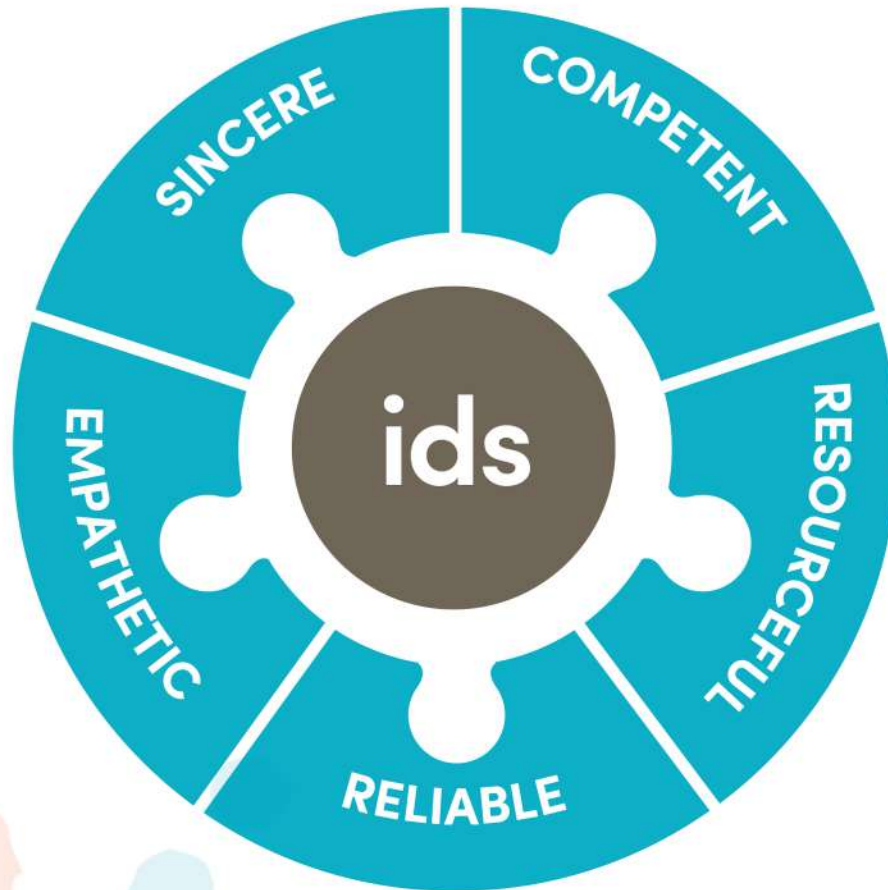
We strongly advocate human rights for all people. We will partner with you to support you to live as you choose.





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# Our Character



## COMPETENT

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

## RESOURCEFUL

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

## RELIABLE

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

## EMPATHETIC

Ability to show understand and share the feelings of others.

## SINCERE

Free from pretence or deceit; proceeding from genuine feelings.



# What We Do

Independent Disability Services (IDS) offers a range of support and services to people living with disabilities.

These cover five key areas:

## 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



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# Acknowledgements

We officially welcomed Jeff Bye to the IDS Board in February 2022 after being a committee member of the Finance, Risk, Audit & Compliance (FRAC) Sub-Committee since 2021. Jeff is an accomplished Finance Management Executive with over 35 years of experience across multiple business environments. His focus is on financial processes, business controls and Information systems. Jeff is a Fellow of the Institute of Chartered Accountants ANZ and is a member of the Australian Institute of Company Directors (MAICD).

Thanks to ongoing consultant contributors Donna Orchard of Orchard Consulting and Cheryl Lardner of Cherry Bamboo. Both have continued to support us in our continuous improvement journey and have provided clear direction and initiative-based solutions.



***"Just because a man  
lacks the use of his  
eyes doesn't mean  
he lacks vision."***

*~ Stevie Wonder*





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



Independent Disability Services Inc. Level 3, 60 Leicester Street, Carlton, Vic 3053  
Telephone: 03 9340 5100 Email: [admin@idsa.org.au](mailto:admin@idsa.org.au) ABN 21 157 513 691