



# Annual Review 2014 -2015



INDEPENDENT  
DISABILITY SERVICES

*Changing lives, empowering people*

# Contents

Our Client Services	3
IDS Board and Management	3
Chair's Report	4
CEO's Report	5
Operations	6
Simon Chong's story	7
Individualised Support	8
Housing Support	9
Daniel Fitzgerald's story	9
IDS Bookkeeping	10
Irene Gerards story	10
Environmental Commitment	11
Client Survey	11

## Our Vision

People with disabilities have the support they require to live the life they want.

## Our Mission

Client-directed services for people with disabilities in Victoria. We provide world leading support for people with disabilities, with a perspective that enhances access to networks and services across the community.

## Our Values

Independent Disability Services client centred values:

- Respecting people,
- Providing opportunities,
- Individualising control,
- Maximising choices.

## Our Performance Centred Values

- Leadership,
- Performance,
- Innovation,
- Accountability.

## IDS Board and Management

### IDS Board Responsibilities

The Board is responsible for the governance, strategic direction and establishing goals for the organisation.

The Chief Executive Officer is responsible for day to day management of the organisation, in accordance with the strategic direction.

Directors must meet the eligibility requirements under the Constitution. The IDS governance framework plays a key role in supporting our business operations through:

- Strategic and operational planning,
- Operational alignment with Mission and Values,
- Risk management and compliance,
- Financial management and reporting,
- Culture.

IDS Board Members are expected to observe the highest standards of ethical behaviour, working for the best interests of IDS.

### Financial Reporting

The CEO undertakes monthly financial reporting to the Financial Working Group (FWG). Monthly results are reported against Budget and revised forecasts for the year then prepared for approval prior to FWG and Board Meetings.

### Investments

The CEO, Board and Financial Working Group conduct regularly reviews of the organisations investments. These include measurement against corporate objectives and budgets.

# Our client services

## Case Management

Coordinating support services and community resources on behalf of clients. Fostering an environment where the client is given choice on their individual goals and how these may be achieved.

## Administration

IDS administers a number of clients budgets, allocating monthly spend and providing advice on any over or underspend. We work with our clients to find innovative ways to maximise the level of support they can purchase and provide guidance of on what can be purchased within the ISP guidelines.

## Direct Support

Tailored support services that are comprehensive, flexible and responsive to our clients, with an emphasis on community inclusion.



## Housing Support

Working with our clients to source suitable affordable housing that matches their individual needs and preferences.

## Supported Accommodation

Our Transitional Housing Program offers people with a disability active support and life skill building. Working with them as they transition from supported accommodation to independent living.

## Social Enterprise

IDS Bookkeeping provides meaningful employment and career opportunities through an accredited training and employment program, that leads to genuine career opportunities, flexible working conditions and industry standard rates of pay.

## Risk Management

The organisation has a strategic and operational risk management framework. The framework integrates risk management within all operational processes.

## IDS Board

Tricia Malowney - Chair,  
Wendy Barratt - Deputy Chair,  
Michael Tarulli - Treasurer,  
Richard Lee - Deputy Treasurer,  
Amanda Lauri - Jones, *commenced April 2015???*,  
Rocca Salcedo, *Resigned January 2015*,  
Brent Alford, *Resigned January 2015*,  
Duke Trench-Thiedeman *Resigned January 2015*.

## IDS Leadership Team

Jed Macartney - CEO,  
David Ng - Finance Manager,  
Nicole Stribbles - Individualised Support Manager,  
Kerrie Doherty - IDS Bookkeeping Manager,  
Ian Payne - Marketing and Communications Manager.

# Chair's Report - Tricia Malowney



IDS Chair, Tricia Malowney and CEO, Jed Macartney

The team at IDS have faced a number of challenges over the past 12 months that have largely been outside of the organisations control, as outlined in the CEO's report on the following page. This has led to a disappointing financial result, that I am confident will be reversed.

We obviously need to ensure the organisations financial sustainability as we transition to the NDIS. We therefore took steps to become an accredited provider to TAC and WorkSafe, offering our services to a larger pool of potential clients.

## The transition to the NDIS

A key focus for the next twelve months will be ensuring our clients and their support networks are prepared for the roll-out of the NDIS. The organisation will hold a series of information sessions throughout 2015/16 for clients and their families, helping them understand how the scheme operates and how to navigate through the transition process.

Throughout 2014/15 we have gained a greater appreciation of what the transition to the NDIS will mean for the organisation and what we need to do to shift our service delivery model and processes.

Innovative strategic thinking has been required to ensure we can continue to offer a broad range of services to our clients with a relatively small team of head office staff. We have done this through examining what we currently do, what we will need to do on behalf of our clients and how we can improve our internal processes and service delivery. This has required procedural and staffing adjustments as we prepare for a nationally-consistent approach. This will be a world where

the individual will have a much greater say in the services they purchase.

## Our processes

The organisation has an ongoing commitment to quality of service, continually reviewing of our incident management practices, policies and procedures. Identifying how we can improve across these areas. The introduction of our customer management system MERP has greatly improved our record keeping and administration processes.

Recognising the need for an organisational review we adopted a new Constitution at the July 2014 Board meeting. This Constitution was adopted to ensure IDS remains focused on optimising our service delivery and our vision that looks toward ensuring, *'People with a disability have the support they require to live the life they want.'*

## Board changes

There have been a number of changes to the IDS Board, in line with our new Constitution. I would like to sincerely thank both past Member and new Members of the Board and advisory committees, who all give their time voluntarily to guide the organisation. Our Board is now at full strength and looking forward to a bright future.

The Board will continue to ensure that the Management and team at IDS are focused on quality of service and efficiency, ensuring we listen to our clients, that we offer services that are relevant to the individual clients needs and goals, reflecting demands of a changing marketplace.

## Looking forward

As we transition to the NDIS it will be vital that potential clients are able to easily access information and the supports they need. Throughout 2014/15 we have actively promoted our services across a broad range of social media channels. An area we will continue to develop as our clients adopt new technologies.

IDS will continue to influence community opinion, disability policy and decisions and leverage its position of influence to improve equality and ensure our clients rights are upheld.

# CEO's Report - Jed Macartney

The past year has been one of significant adjustment at IDS. We have adjusted to changes in the way DHHS conducts its ISP planning that resulted in a complete lack of referrals of new clients for 12 months. We have adjusted our thinking and processes to align with the higher expectations of our clients. Finally, we have adjusted our internal processes to both align with higher client expectations and to prepare for the NDIS.

The result of these adjustments is an organisation that now considers the client's end-to-end experience in all facets of its operations. Our response to new enquiries is much faster and more thorough, as is our response to our client's changing needs. Our thinking is more closely aligned to our client's wishes making their support our highest priority.

We have improved our marketing and social media presence and learnt how to find new clients through independent means, rather than relying on DHHS referrals. We are much more responsive and flexible in the design of new packages to meet client's needs and have learnt that the old "one size fits all" model is no longer relevant and will not sustain as we move towards the NDIS.

The result of all of the above is a financial result that does not reflect the significant steps IDS has taken to move forward to a more independent, responsive organisation that is ready and looking forward to the NDIS.

## Our staff and services

Our client support team offers an outstanding level of support to our clients. With the combination of Case Management, Administration and Support Workers, the team is able to address all facets of a client's support needs in a very timely manner.

We are now much better at marketing ourselves and competing on the "open market" – vital skills for survival under the NDIS. Our internal processes are better aligned with clients self management and dealing with third parties. Again, vital skills for managing cash flow under the NDIS.

We have introduced some new services such as Direct Employment, whereby IDS will employ staff chosen by a client to work exclusively with them client. This allows the client to self manage their ISP, without the need for clients to manage the employment aspects of their supports.

We continue to pursue innovative housing options such as independent living and transitional programs. We have leased two houses for clients

to occupy adopting an independent living model. They are essentially housemates with our role being to optimise their supports and facilitate the ongoing harmony of the house.

Our social enterprise, IDS Bookkeeping is steadily growing its client numbers. Our first trainee, Irene, is part way through her bookkeeping course and is taking a break to become a mother. She will complete her training next year.

**The organisation is committed to the health and safety of our clients and workforce. We continue to focus on developing and delivering policies, procedures and programs that ensure we do not place our staff or clients in situation where their safety and wellbeing is compromised. This is particularly important where staff are working remotely in client's homes.**

As can be seen from the financial results, all of the above has put a significant strain on our cash reserves as IDS has funded both the housing initiative and the social enterprise. Therefore, for the first time in our history, we have commenced a fundraising program. This is necessary to allow us to continue the valuable work that is not funded by Government.

Finally, I would like to thank our staff for their hard work and support through a period of significant change and our Board for their support and guidance, particularly Tricia and Michael in their respective roles as Chair and Treasurer.

## Financial overview

	2015 \$	2014 \$	2013 \$
Income	2,740,302	4,075,128	4,320,000
Expenses	893,165	959,591	940,758
Net Surplus	-132,364	28,745	66,268
Total Assets	956,042	1,335,236	1,336,485
Total Liability	617,962	864,792	894,786
Net Worth	338,080	470,444	441,699

## Systems

The introduction of our Customer Relationship Management system, MERP placed considerable demands on our day-to-day operations. However the organisation is now placed in a much better position to securely record: client information, staff rosters, billing and other information on a single platform, greatly improving productivity, security and client service.

As part of our ongoing review of service and supplier contacts the organisation adopted a new telephone system taking advantage of the NDIA. This has resulted in improvements in accessibility and financial savings.

## Staff

All IDS staff have a clear focus centred on the needs and aspirations of our clients. Prior to engagement they are required to have a police check, undertake a staff induction program and provide at least two referees to support their work history. All IDS Staff are engaged on individual contracts, with terms and conditions above award.

The organisation welcomes open and honest comment from staff and clients, seeking to maintain a healthy and productive work environment.

IDS ensures all of its employees have access to professional learning and development opportunities.

## Quality and Risk

IDS completed a review of all policies and procedures adopting an easy to understand flow chart format. As part of the staff induction program staff are offered guidance on all policies and procedures that are relevant to their role.

## Resolving customer enquiries and complaints

All client compliments and complaints are recorded and addressed at the weekly managers meeting.

Clients dissatisfied with the outcome of our complaint handling process can refer their concern to the Disability Services Commissioner.

## Incident reporting

As a disability provider IDS has a mandatory responsibility to report all incidents involving our clients to the appropriate offices at the Department of Health and Human Services.

We have met this requirement across all categories of incidents as required.

## Confidentiality

We are committed to protecting the privacy of all clients and stakeholders. IDS handles large volumes of personal information, including: contact, health and bank account details.

All IDS electronic records are held on a secure server that is password protected, ensuring only approved IDS employees can access confidential information.

IDS employees are required to comply with the relevant privacy policy and legislation relating to information privacy, such as the Privacy Act 1988, the SPAM Act 2003 and the Do Not Call Register Act 2006.

During the financial year there were no determinations against IDS.

## Social Media

IDS has embraced a range of social media platforms, including Facebook, YouTube and Twitter.

We have been able to connect and engage with an ever growing group of people across Australia raising awareness on the issues people with a disability face.

## Community Engagement

IDS continued our program of Information Seminars to people with a disability and others involved in the disability sector. We continue to distribute our newsletter to clients and others within the disability sector.

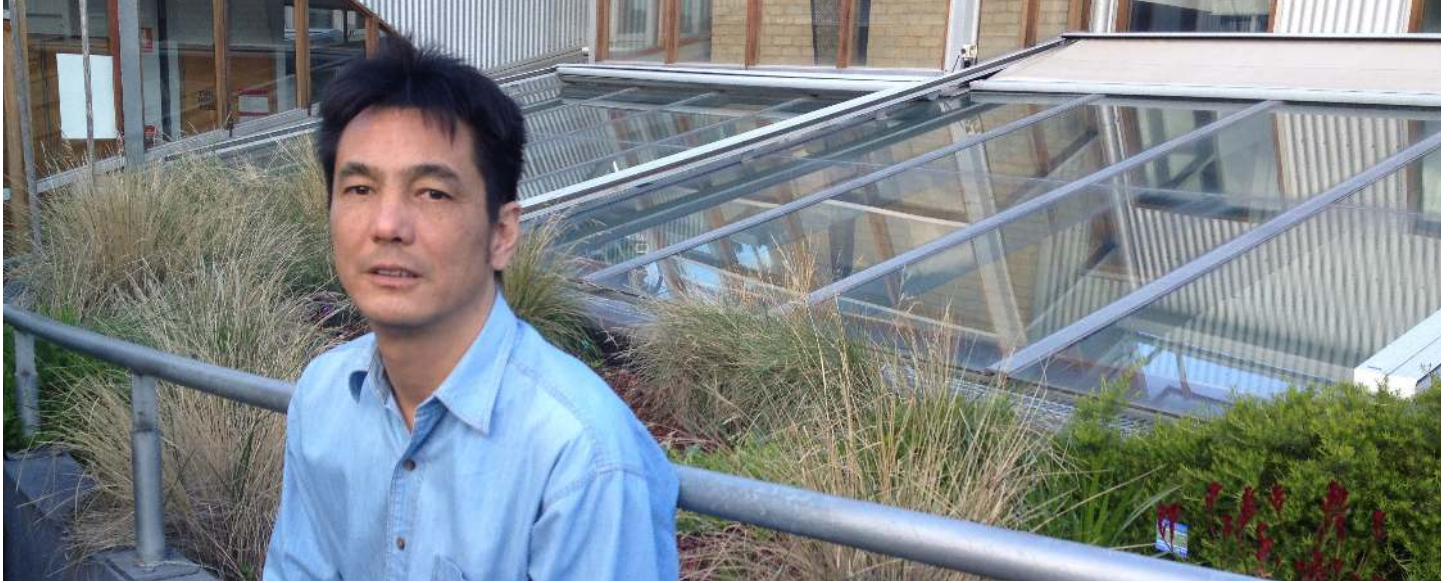
IDS staff have attended and presented at a range of seminars and forums across Victoria.

## Volunteers

IDS' dedicated volunteers have provided valuable support to our services throughout the year.

Before commencing all volunteers are required to provide a working with children (where applicable) and undergo a police check along with completing the IDS induction program.

# Why I volunteer - Simon Chong



People volunteer for a number of different reasons. Some people volunteer to gain career experience and develop new skills.

Others volunteer as a result of instilled values they have, that compel them to help others. And some people volunteer because they enjoy meeting new people and being part of something worthwhile.

Simon volunteers because he wants to give back to the community. Because he is grateful for the help he received from others.

Simon is legally blind, Leber Hereditary Optic Neuropathy (LHON) an inherited form of vision loss claimed 90%

**In an age where we are becoming more internally focussed it is important to acknowledge the work and commitment of our volunteers, without them many organisations would not survive.**

of his sight when he was 18. As a child he enjoyed an idyllic life in Perth, making the most of the climate and outdoor lifestyle the city offers. Simon's parents were aware

that he and his brother may be affected by LHON - he has two cousins who contracted it in their childhood, as he reached his late teens it was hoped the disease had passed him by.

He was coming close to finishing an apprenticeship when Simon realised something was not quite right. He started making excuses to his mates about driving because he wasn't confident with his vision. However the day he had to ask a friend what colour the traffic lights were it hit home. The onset of LHON was sudden, it was November when he first realised something was not right, by February the next year the disease had taken its toll.

His disability has not deterred Simon. He moved from Perth to NSW to experience life in the eastern states. The move to Victoria followed a heart-to-heart with

a close friend about the direction his life was taking. Following this discussion, Simon decided to come to Melbourne and participate in Leadership Plus, a program that encourages diversity inclusion, fostering active citizenship. The program taught him a lot about how to navigate around business procedures, along with programs in public speaking and governance.

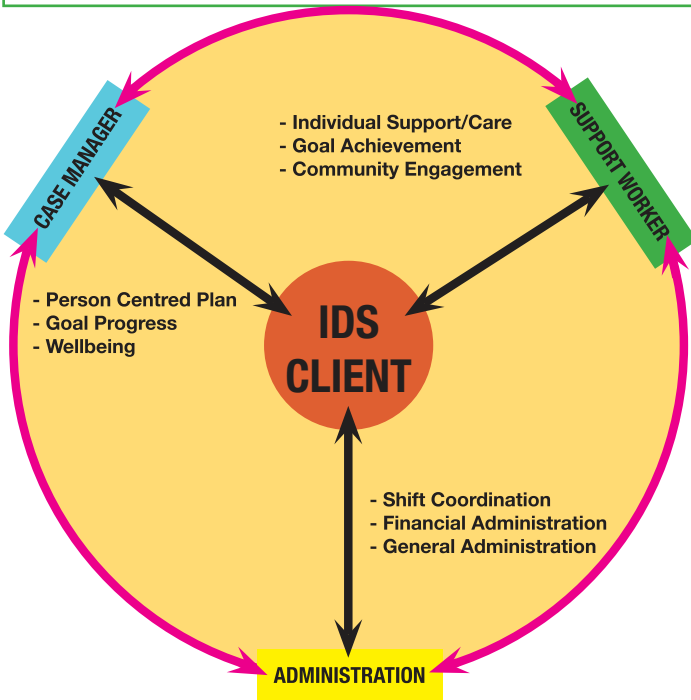
Simon has a wide range of interests from politics to football (he is a member of the Fremantle Dockers cheer squad and goes to most of the Melbourne games). He loves Melbourne's healthy music scene saying, "It almost makes up for the weather". And he enjoys the diversity of the city and the range of entertainment options. "Perth's idea of entertainment is a trip to the beach followed by a backyard BBQ. Whereas Melbournians" have to be more inventive about their social activities because of the climate" he says.

Simon has had a long relationship with IDS, initially as a housing client, keeping in touch with the team through our newsletter and other IDS clients. It was following an IDS Seminar on housing that Simon approached us to ask if he could offer his services as a volunteer. That was over 12 months ago now and Simon has become an integral part of the team, undertaking a range of administration and support activities including the massive task of scanning our printed documents into soft copies files.

"I was looking for an opportunity to develop my computer and business skills, in an organisation that understands disability, who would support me, whilst giving me the time and flexibility to work things out for myself. The team have been great, and work hard on behalf of their clients. I would not have stayed on if I did not believe in the work they do and their obvious commitment" said Simon.

Thank you Simon for the work you do on behalf of our clients and the team at IDS.

# Individualised Support



Historically IDS has brokered our direct support services to external agencies, with IDS staff handling clients Case Management, Financial Administration and Service and Support Coordination requirements.

The introduction of IDS Individualised Support - where IDS provided direct support to our clients, highlighted the need to radically rethink how we managed our day-to-day interactions with our clients. We needed to ensure we became proactive, receptive, and adaptive and our focus was based on meeting the needs and goals of our clients and their support networks. The previous model where staff worked independently left gaps in information transfer and ridged lines of responsibility.

Following a review of operations we made the decision to introduce **Client Support Teams** comprising of a **Case Manager**, whose primary role is to address our clients specific support and social needs, their goals and to develop their support plan. Our Case Managers' work with our clients to find innovative ways to maximise the level of support they can purchase. IDS **Client Support Administrators** are responsible for administering clients budgets, allocating monthly spend and providing advice on any over or underspend. They also provide guidance on what can be purchased within the ISP guidelines and our **Direct Support Worker** are responsible for the day to day support of our clients.

The new structure has resulted in a higher degree of employee involvement; teamwork with shared knowledge and a consistent focus on client outcomes; a flatter organisational structure - removing a level

of middle management, this has resulted in senior management exchanging more feedback with those providing our services and less overhead costs; and a shared knowledge of the changing environment.

Since the introduction of our Individualised Support program we have grown the number of clients and now offer direct support to over 37% of our clients. The further development of this program is vital to the ongoing sustainability of the organisation, we therefore need to ensure we offer a level of service that other agencies will find hard to match.

A key component of the IDS Individualised Support philosophy is the importance placed on community inclusion. IDS staff work closely with our clients to develop, implement and monitor strategies that focus on their involvement in community. We have also committed to involving our clients in the selection and engagement of their support workers, matching them across a range of personal interests, personality types and client preferences.

IDS offers Individualised support across the following areas:

- **Personal Support,**
- **Social Inclusion/Community Access,**
- **Home Help,**
- **Communication and assistive technology,**
- **Home and Garden Maintenance.**



*As a member of our Client Support Team Jo Fernandes is committed to making a difference to the lives of the clients she supports.*



# Housing Support

## Independent Living Program

Subsidised, appropriate housing provided by community housing providers plays a key role in meeting the demand for housing from people with a disability. The National Disability Insurance Agency has indicated that it expects to provide financial support to help providers to continue to meet this need. Meanwhile people with a disability living in Victoria continue to face a shortage of affordable housing as demand continues to outstrip supply, placing pressure on property and rental costs.

Another area of increasing concern is the number of adult people with a disability who live at home with their families, usually their ageing parents.

Recognising this need for alternative housing models that offer independence and choice, IDS embarked on a program designed to transition people with a disability from the family home into shared accommodation. The IDS housing program offers independent living in an environment where our clients feel safe and supported.

In January 2015 we took a long-term lease on two modified properties in Montmorency working in partnership with HomeGround. This was followed by a period of meeting with potential tenants and putting into place support and transitional plans.

So far four people have been engaged in the program. The experience has provided some key learnings for the IDS team and how we manage service delivery.

## Each partnership

IDS is partnering with EACH Housing and have commenced construction on a development of six self contained, fully modified apartments. Once completed, this initiative will offer long-term independent living, supported accommodation to people with physical disabilities.

## HomeShare

We continue to offer the IDS HomeShare program, pairing housemates with IDS clients.

## Results

During 2014/15 the IDS Housing Support team found appropriate accommodation for ?? people from our waiting list into long-term accommodation. We also assisted ?? people, helping them move from transitional into long-term housing. Unfortunately because of the demand from other providers IDS was only able to place ?? people into transitional housing.



## Daniel Fitzgerald

Daniel Fitzgerald is one of our first clients to benefit from the IDS Independent Living Program. Daniel has cerebral palsy his disability means he requires daily support to help him do the things most of us take for granted.

Although cerebral palsy is a disorder that can impact any and all aspects of a person, it does not define who that person is. Daniel still wants a high quality of life and his parents want the same thing for him.

Much of Daniel's character can be attributed to the supportive environment he was brought up in. His parents have always encouraged him to live life to the fullest and his two brothers never giving him any quarter.

Having children obviously changes the way we live, having a child with a disability meant every aspect of Daniels parents lives was shaped by his needs. However, they have always recognised Daniel's desire to maximise his independence, and have had to learn how to navigate the "system" to ensure he was given every opportunity. With this and Daniels expressed desire to live independently in mind, he and his parents started to explore what independent living options were available. As a very social person, it was important that Daniel find accommodation with people of a similar age and shared interests. Daniel was also keen to live somewhere where he could continue to connect with the community. Coincidentally their search for accommodation took place at the same time as the launch of the IDS Housing Program.

Daniel has now been living in Montmorency for six months. The transition was not always easy, however his parents are very pleased to see how Daniel has managed the change, welcoming the opportunity to prove that he can live independently. Daniel has made a huge transition in his life and one that he cannot see going back from.

# IDS Bookkeeping

IDS Bookkeeping is the first social enterprise of its type in Australia. The program provides meaningful long-term employment and genuine career opportunities to people with a disability, giving them skills to become qualified bookkeepers. Once qualified participants in the program will be employed by IDS Bookkeeping, offering their services to businesses across metropolitan Melbourne.

IDS is ideally placed to facilitate training through our qualified, experienced staff and our experience of working with people with a disability.

Participants in the IDS Bookkeeping program are supported by on-the-job training that complements their formal studies. The variety of type of business we service and the different requirements of our clients, exposes our trainees to a wide range of business needs giving them a solid grounding in Bookkeeping.

All qualified IDS bookkeepers have BAS accreditation and work in accordance with the Pure Bookkeeping system. The Pure system ensures continuity across our service whoever supports the client. Along with a guaranteed quality of the service, we have a unique selling point - *IDS Bookkeeping is not just another bookkeeping service, it is a bookkeeping service with a social purpose.*

Support grants from the City of Melbourne and the Jack Brockhoff Foundation have helped establish the program in a competitive market funding the purchase of software licences and the cost involved in participant training.

## Results

Representations have been made to key industry bodies with solid support for the program has been demonstrated. IDS became a registered BAS agent in April 2015.

Within the first year of operating, IDS Bookkeeping delivered bookkeeping services to clients in the manufacturing, retail and health sectors as well as professional services in leadership development.

It has recently been engaged to provide a bookkeeping service to clients in the property sector and in online retail – evidence of the high capability of its experienced staff, and that operating a bookkeeping service using a social enterprise model can be effective.



## Irene Gerard

Trainee Bookkeeper Irene Gerard is the first participant in the IDS Bookkeeping Program. Irene has a profound hearing impairment and found it very difficult to find appropriate employment.

After completing year 12, Irene enrolled in a photography course having demonstrated a keen eye for photographic composition. Unfortunately because of lack of support she didn't finish the course, leaving her with few career options. Irene started work at one of our better known supermarkets.

A holiday in Egypt with Irene's father offered an opportunity to take stock of her life and the direction she wanted her career to take. After seven years working as a cashier, and several failed promotion attempts, Irene realised her career opportunities were limited. A course in Business Administration led to an interest in bookkeeping. Irene held a discussion with her disability liaison unit officer who told her about the bookkeeping traineeship at IDS Bookkeeping.

Irene commenced her engagement with IDS in February, she is progressing well with her studies at TAFE, supported by on the job training at IDS.

“All the staff at IDS are very friendly and supportive. The bookkeepers that work for IDS Bookkeeping have a great deal of experience and are keen to see me succeed in the role. The team treat me just like everyone else and I feel like I am one of them”, say Irene.

# Environmental Commitment



*Water filtration system at 60L Leicester Street*

IDS offices are located in the 60L Leicester Street, a premier green commercial building, with a unique approach to energy and water consumption, and the use of recycled and re-used materials.

The organisation promotes a culture of environmental awareness. Staff are made aware of their responsibilities as detailed in the Environmental Policy.

We are committed to:

- Incorporating environmental sustainability into our governance framework, taking into account our environmental risks, responsibilities and organisational capability.
- Embedding environmental sustainability thinking and action in all aspects of our work.
- Encouraging environmental awareness and the our individual environmental impact with all clients.
- Actively engaging with staff, suppliers, industry partners and the community around sharing and realising our commitment to sustainability.
- Minimising our environmental footprint through sustainable management of resources.
- Preventing pollution and minimising waste.

- Introducing more sustainable procurement approaches.
- Continually improving and learning from our efforts in working towards environmental sustainability.
- Ensuring our activities comply with all relevant environmental laws and policies.
- All IDS information and promotional brochures are printed on paper stocks supplied by accredited environmentally sustainable resources. Stocks supplied by accredited environmentally sustainable resource

## Client Survey

During the 2014/5 financial year we conducted a survey seeking responses across a wide range of criteria.

Key results include:

---

**Q:** How often do you receive support from us?

**R:** Daily 40%: 2-4 times a week 30%: Weekly: 30%.

---

**Q:** Are you satisfied the staff at IDS are looking after your interests?

**R:** 22% very satisfied: 67% satisfied: 11% dissatisfied.

---

**Q:** Are you satisfied with the quality of support offered by your support worker?

**R:** 67% very satisfied: 33% satisfied.

---

**Q:** Does your Case Manager encourage and support you to live as independently as possible?

**R:** 30% always: 40% often: 30% not applicable.

---

**Q:** How easy is it for you to access the services offered by IDS?

**R:** 23% very easy: 62% easy: 15% not very easy.

---

**Q:** Does your Case Manager encourage and support you to live as independently as possible?

**R:** 30% always: 40% often: 30% not applicable.

---

**Q:** Does the service we offer represent good value for money?

**R:** 18% excellent value: 46% good value: 27% Neutral: 9% poor value.

---

**Q:** Do IDS employees respect the decisions and choices you make?

**R:** 50% always: 50% often.

---

The survey also demonstrated that no clients had been abused by IDS staff or by staff engaged by IDS through other agencies.

---

**Independent Disability Services Inc.**  
Suite 3.01, Level 3, 60 Leicester Street,  
Carlton, Victoria 3053

**T.** 03 9340 5100  
**F.** 03 9340 5102  
**E.** [admin@idsa.org.au](mailto:admin@idsa.org.au)  
**W.** [www.idsa.org.au](http://www.idsa.org.au)

**ABN.** 21 157 513 691



IDS is committed to accessibility  
of our services and information



IDS provides access to  
interpreting services



**INDEPENDENT  
DISABILITY SERVICES**

*Changing lives, empowering people*