



2022 - 2023

# Annual Report

[www.lifely.org.au](http://www.lifely.org.au)





# Acknowledgement of Country

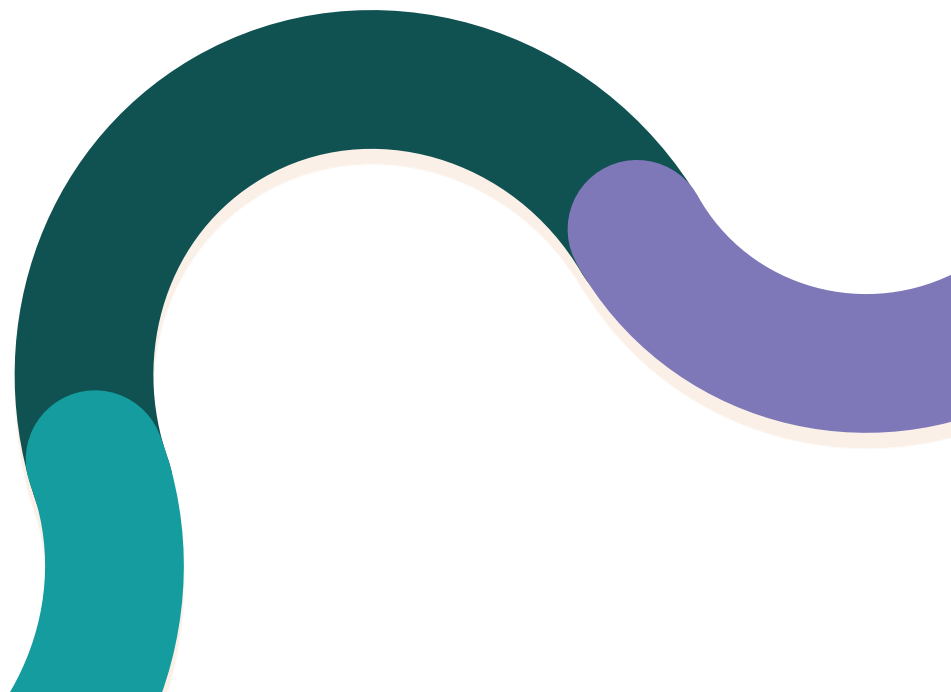
In the spirit of reconciliation, Lively acknowledges the Traditional Custodians of country throughout Australia and their connections to land, sea and community.

We pay our respect to their Elders past, present and we extend that respect to all Aboriginal and Torres Strait Islander peoples today.



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# Get to Know Lifely





To empower people with a disability, their families and carers to make choices that enhance their lives.

## Vision

The things that matter.

Advocacy

Belonging

Care

Choice

Community

Connection

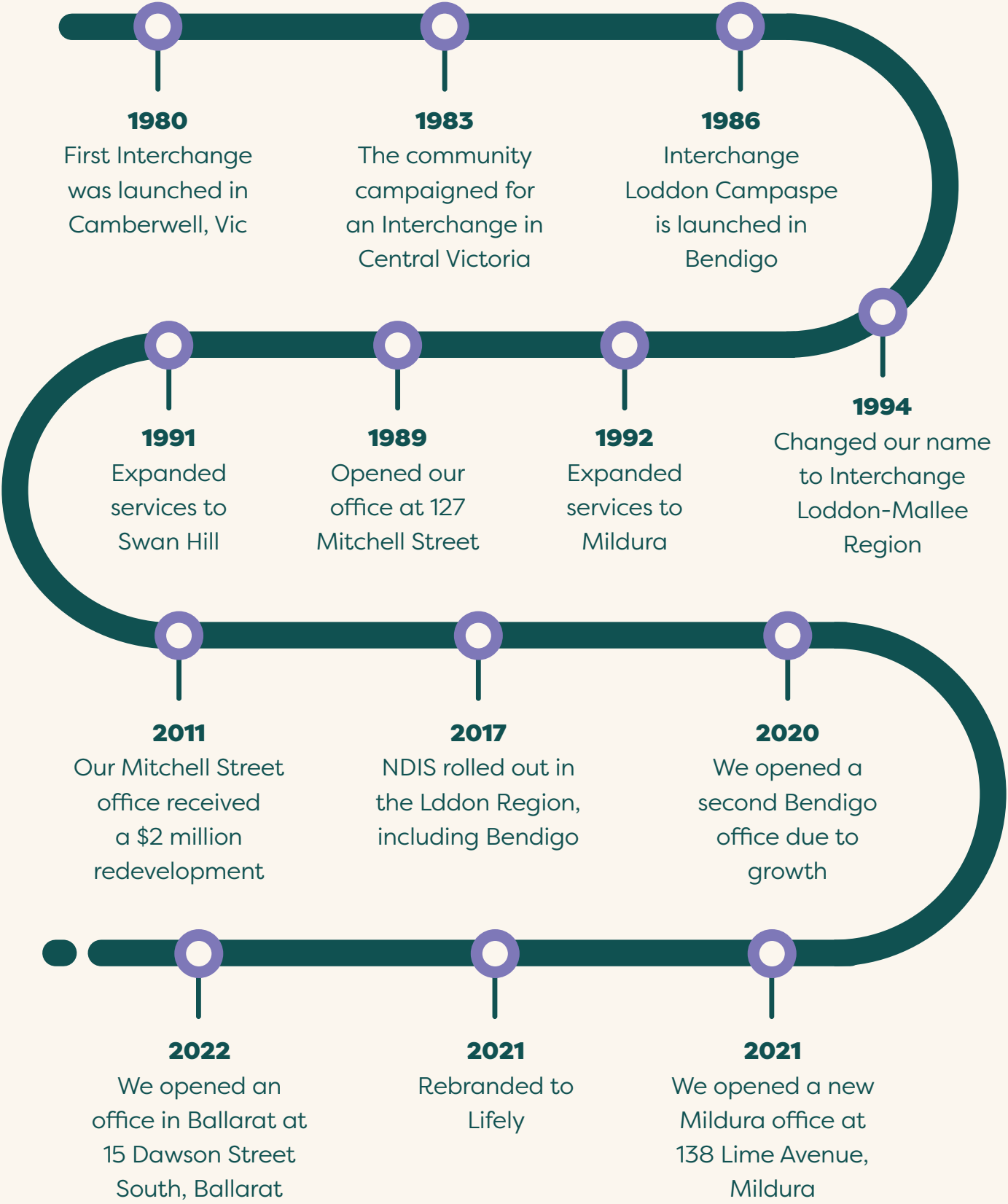
To provide inclusive high-quality services for people living with a disability in regional Victoria, New South Wales, and South Australia.

## Mission

We're dedicated to inclusivity in race, gender, age, religion, and identity, ensuring top-quality disability and children's services in a welcoming, harassment-free environment.

## Diversity

# Our History





# Chair and CEO Message

## Message from the Chairperson and Chief Executive Officer

It is again with pleasure that we provide our report for the 2022 – 2023 Financial Year. It has been a pleasure to get back to work to our full capacity and, indeed, start to expand again.

It was very pleasing to hear that the Victorian Government has decided to commit ongoing funding for the Outside School Hours Care (OSHC) project, the pilot project which we have managed at Kalianna and the Bendigo Special Developmental School. Twenty new sites will be funded over the next two years.

Our service in Mildura continues to consolidate the Support Coordination and Plan Management areas as well as direct support. An Advocacy position for Mildura continues to be funded by Carer Support Services.

With the opening of our Ballarat office, it has been very pleasing to see the growth and consolidation of like services in the Ballarat and Maryborough areas with our Support Coordination team undertaking a number of public information sessions to connect with participants and their families.

We have continued to pursue Supported Independent Living (SIL) options as well as the potential to become a Supported Disability Accommodation (SDA) Provider.

During this financial year, we also undertook a minor restructure which resulted in the creation of the Deputy Chief Executive Officer

and the Direct Support Operations Manager roles and the realignment of our approach to quality and National Disability Insurance Scheme Registration.

As always, our thanks go to our amazing staff, from those who provide direct support to our participants to those who provide the coordination and administration that underpins our direct supports.

We also say a huge thank you to our Board of Directors and our community volunteers who actively participate in our various subcommittees. Thanks also go to our volunteers who assist with our group activities and camps throughout the year.



**Janette Martin**  
Chief Executive Officer



**Scott MacRae**  
Chairperson



Finance, Audit and Risk

Marketing and Fundraising

Quality, Safety and Compliance

# Governance

## Subcommittees

Lifely is led by a Board of Directors. The entire Board meets a minimum of six times per year. Three subcommittees make recommendations to the Board regarding their area of interest.

Each subcommittee has a community member representative who has relevant skills and experience in a related sector or industry.



# Our Board



**Scott MacRae**  
Chairperson

Dip. Bus. (Gov), FICDA

Scott is a Business Banking Manager at the National Australia Bank. Previously, Scott worked with Bendigo and Adelaide Bank's joint venture, Community Sector Banking. Scott has held executive and non-executive director roles within various not-for-profit organisations. He has an in-depth knowledge of the not-for-profit sector. Scott has been part of our board since March 2017



**Partha Nag**  
Secretary

B.Bus (Notre Dame), M. Professional Accounting (Curtin), CPA, MAICD

Partha is the Executive Director of Strategic Business Alliance, providing custom business solutions to professional service companies across Australia and New Zealand. He holds executive and non-executive roles with various private organisations and not-for-profit entities. Currently, Partha is also a carer and has a deep interest in the disability sector.



**Ian Watson**

BSc(Hons), MBA

Ian is a project manager with more than 25 years of experience in the health, utilities and research sectors. He is passionate about improving health care in the Loddon Mallee Region through better community engagement. His skills include project management, governance, change management and organisational development. Ian joined our board in 2018.



**Tracy Robertson**  
Vice-Chairperson

BBus, GCertPol&Policy, GDipArts, MAppSci. Dip.Gov, MAICD

Tracy has worked in the tertiary education sector for more than 20 years. Her roles have included supporting researchers, developing collaborative partnerships, managing projects, negotiating solutions, and interpreting statistical reports to identify trends and opportunities. Tracy joined our board in 2019.



**Richard Baker**  
Treasurer

MAID

Richard is a banking veteran with a career spanning almost 40 years. Richard has held senior management positions with Bendigo and Adelaide Bank and is a non-executive director of Sandhurst Trustees. He specialised in risk management, strategy, governance and finance. He is also actively involved in local community groups and sporting clubs.



**Josh Pell**  
Director

BBus, GCertPol&Policy, GDipArts, MAppSci. Dip.Gov, MAICD

Josh is a project manager at Bendigo and Adelaide Bank's philanthropic arm, Community Enterprise Foundation™. Josh's 12-year career at the bank has allowed him to be involved in numerous community-focused projects, fundraising and nationwide granting. His speciality skills and experience include community engagement, project innovation, strategic initiatives, stakeholder management and marketing. Josh joined our board in 2018.



**Dr. Kat Ritchie**  
Director

Kat was born in Malaysia; she did her A-Levels in Singapore before coming to Melbourne for university. As a gymnast, who for years represented her home state of Selangor, Kat continues to be involved in the local gymnastics scene and has always been extremely energetic, bouncy, and vivacious. She brings this energy to everything she does, including being on the Lively board. She is keen on drawing, cooking, and calligraphy. She plays the piano and helps lead the singing at church on Sundays. She has a husband, two children, and an ageing cat. Kat is now a general practitioner living amongst the kangaroos, far from the lights of KL. She is very happy.



**Jacquie Pilcher**  
Director

Jacquie has led an impressive career as a project manager specialising in capital and civil projects. Before her current role as a contractor for the Department of Defence, Jacquie worked with Bendigo and Adelaide Bank in the finance and fraud teams. Jacquie is passionate about helping communities grow and enhancing the lives of others. She has contributed to various charities, including the Brotherhood of St Laurence and Good Shepard. Jacquie joined our board in 2022



**Callum Wright**  
Director

MBA (LaTrobe), PGradDipOL (Oxon)

Callum works for Bendigo Community Health Services with executive responsibility for primary health, allied health, refugee settlement and corporate services. He has previous experience in community engagement, philanthropy, banking, finance and strategic projects roles in the corporate sector. Callum is passionate about building stronger communities, the power of local organisations and ensuring that everyone can connect with their community in a meaningful way and live a fulfilling life.

Directors		
	Eligible to attend	Attended
Scott MacRae	7	6
Tracy Robertson	7	7
Jacquie Pilcher	5	3
Partha Nag	7	4
Josh Pell	7	7
Ian Watson	7	6
Richard Baker	7	7
Kat Ritchie	7	7
Callum Wright	7	7



# Treasurer's Report

## Financial Highlights

Total Revenue	<b>\$13,850,040</b>
Total Expenses	<b>\$13,527,827</b>
Net Surplus/Deficit	<b>\$322,213</b>

## Cash Flow Insights

In terms of cash flow

Operating Cash Flow	<b>\$953,760</b>
Investing Cash Flow	<b>-\$108,009</b>
Financing Cash Flow	<b>-\$106,556</b>
Net Cash Flow	<b>\$739,185</b>

## Balance Sheet Snapshot

Total Assets	<b>\$6,832,505</b>
Total Liabilities	<b>\$2,590,390</b>
Net Assets	<b>\$4,242,115</b>

In the treasurer's report for the fiscal year from July 1, 2022, to June 30, 2023, we present a comprehensive overview of Lively's financial performance.

Throughout the financial year ended June 2023, the finance and risk sub-committee and the finance team have worked to improve our reporting structures and engage with our teams. This approach ensures all staff understand how our funding and budgets work, and are actively involved in implementing strategies that contributed to our improved financial performance this year.

Our overall financial performance has seen a significant turn-around from the prior year, which was affected by the COVID pandemic and a slow return to pre-pandemic life. Despite an ongoing challenging financial environment in 2022-2023, Lively has recorded an operating surplus of \$322,000 which is a turn-around from the previous financial year of +\$659,000.

The overall financial position of Lively remains strong, with growth expected to continue into the coming years albeit with potential headwinds given the uncertainty of what the funding model will look like in the future.

## Fundraising and Grants

We acknowledge the generosity of our donors and sponsors. We want to draw particular attention to the following contributions that will assist Lively in purchasing two additional Wheelchair Accessible Vehicles in the coming year.

- Estate of Margaret Bertuch
- Perpetual IMPACT Philanthropic Program

We thank the generous contributors listed above for their generous donations and look forward to having the Wheelchair Accessible Vehicles available in our fleet.

## Future Financial Goals

Lively will continue to search for new revenue streams while continuing to develop and streamline our existing core business. We have plans to expand our services within the Bendigo, Mallee and Ballarat regions, as well as venturing into new markets.

## Non-NDIS Services

Lively will continue to provide and expand our current non-NDIS services. These services include respite for carers and the delivery of Outside School Hours Care services, both of which we plan to expand in the coming 12 months. We extend our heartfelt gratitude to our dedicated financial team, board members, staff, and volunteers for their unwavering commitment and support.

## SDA Housing

We will pursue partnerships that enable Lively to supply Specialist Disability Accommodation (SDA) services. We are excited about being a part of providing long-term and stable accommodation solutions in an area that has significant shortages.



**Richard Baker**  
Treasurer





# Operations Report

The Operations Team plays a vital role in our organisation's mission to provide high-quality NDIS disability support and children's services.

This report highlights our key achievements, service delivery, quality assurance measures, staffing, participant feedback, operational challenges, financial performance and plans for the upcoming fiscal year 2023 - 2024.

## Key Achievements

During the past year, the Operations Team achieved significant milestones. These include services expansion, increased participant engagement and successful compliance with NDIS standards.

## Service Delivery

Our team delivered essential services to approximately 1,700 participants, covering a wide range of NDIS support categories. We also introduced innovative service delivery methods to enhance participant outcomes.

## Quality Assurance

Ensuring the highest quality and safety of our services is paramount. We maintained rigorous quality assurance standards which in insurre we remain compainat with our NDIS and Education depart registration.

## Staffing and Training

The Operations Team is composed of 191 dedicated professionals who continually access relevant training and professional development. Our Residential Support Workers, OSHC Support Workers and Community Support Workers are provided an induction on commencement with Lively, have access to Lively's online training system (ETrainU) along with other appropriate training, and supported in various informal ways by their Team Leaders and HR.

## Operational Challenges

Our team faced the continue challenge of the competitive market of the NDIS and the increase of unregistered providers. Our team manage these obstacles by continually offering professional service aligned to the choice of each of our participants.

## Future Plans

Looking ahead, we aim to expand our Supported Living Program and moving to the provision SDA services. We will continue with our expansion in to the Ballarat area and towards the western suburbs of Melbourne.

The Operations Team remains committed to our organisation's mission. We are proud of our contributions to providing exceptional NDIS disability services and look forward to another year of continued growth and excellence.







# Corporate Services Report

The Corporate Services Team serves as the backbone of our organisation, providing essential support functions to ensure the seamless operation of our NDIS disability supports, HACC programs and children's services. This report outlines our key achievements, contributions, and plans for the fiscal year 2023 - 2024.

## Key Achievements

Over the past year, the Corporate Services Team has come back together to work onsite, following the affect that COVID had on our workplace and with an established, hardworking, and knowledgeable team we have navigated the ongoing challenges both within our sectors, and the community.

We were excited to have our reception team back on deck and special mention to our wonderful receptionists Petra and Karin who provide a smile to our staff and visitors every day.

## Staffing and Development

The Corporate Services Team continues to grow and adapt to the demands of service provision as evidenced by the changes in team composition including the creation of the Deputy CEO position and a Practice Lead Manager. We have also expanded team leader roles and maintain the Chief Operation Officer position.

## Technology and Systems

Lifely updated to new payroll and accounting software in the 12 months prior to July 2022 and the team have worked implement change management processes and worked with our software providers to improve our efficiencies with those systems reducing the time taken to complete our fortnightly payroll and invoicing process.

Processing a fortnightly payroll throughout 22/23 for 381 unique staff members with over 6500 individual payments made during the financial year with minimal re-work required. We are also pleased to introduce internal IT and System support which will ensure that we remain focused on utilising our technology and systems to enhance the services that we can deliver.

Our corporate services area look forward to providing continued support to all of our program areas in 2023-2024 in making the everyday better.





## Compliance and Risk Management

We maintained a solid commitment to compliance with regulatory standards, including the NDIS Practice Standards. Our robust and regularly reviewed risk management strategies successfully mitigate potential challenges.

## Financial Management

Our team diligently managed the organisation's finances, overseeing budgets, expenditures, and financial reporting. We ensured fiscal responsibility and transparency in our financial operations.

## Administrative Efficiency

Efforts to streamline administrative processes resulted in the ongoing reduction in payroll processing time and greater use of statistical data as a result of better management of our software programs.



# Stories of Success

## Bridging the Gap in Ballarat and Maryborough

Lifely's commitment to serving the community led us to expand our programs into Ballarat. This move highlighted an unexpected challenge. Despite eligibility, a significant number of individuals in Ballarat and Maryborough were not connected to the NDIS and lacked the support they deserved.

Our teams proactively engaged with the Ballarat and Maryborough communities, fostering valuable partnerships with local stakeholders. Notably, Lifely collaborated closely with the region's special developmental schools to address this gap in services by actively supporting families to access the schedule and connect with services.

Our team has also become a valuable resource for the schools' wellbeing teams, helping them increase their knowledge of the NDIS and their capacity to support students and families.

Our team has also run several "Ask Us" events in the towns in the Ballarat, Maryborough and Central Highlands areas where community members can drop in our free advice about the scheme, their NDIS plan and services in the region.

These partnerships have enabled us to understand better the needs of those who have been overlooked and work towards improved outcomes.

Through these efforts, we have been able to connect eligible individuals to the NDIS, ensuring they receive the support and advocacy they rightfully deserve. Our commitment to inclusivity and community impact remains unwavering, and we have plans to continue this community engagement work into 2023-2024.





# Carer Peer Support Program completion

For the last 18 months, Lively has been providing a carer peer support program in partnership with Different Journeys. The purpose of the program has been to help unpaid carers reduce barriers to participating in work or study.

One of the carers, Nikki, involved in this program has kindly agreed to share her experience.

When Nikki first met the worker Clare, she was a single Mum and unpaid carer to her autistic child. Her child needed constant support and she didn't have any supports assisting her.

Together Nikki and Clare spent 18 months working through a list of short term goals to help Nikki achieve her long term goal of employment in the education sector. To allow Nikki to do this, she needed time away from her unpaid carer role by utilising supports for herself and her child so that she had time to study.

Clare helped Nikki understand how to use the NDIS funding in her child's plan and together they found a support worker to assist with meeting her child's NDIS goals.

Once the support worker relationship was established, this provided Nikki with the opportunity to have some time without her child. Nikki was also linked to carer services for herself including Bendigo Carer supports through Carer Gateway and Villa Maria Catholic Homes (VMCH).

To work in the education sector, Nikki needed to study, but did not have access to technology other than her mobile phone. Clare liaised with a carer organisation who provided Nikki with a computer and headphones so that she could study while her child was home.

Another barrier was that Nikki was unable to travel 45 minutes to access her local TAFE, so she was supported to enroll in an online course through a private provider.

A scholarship was sought and awarded so that Nikki didn't have to pay for the course. A Carers Victoria study grant was also approved to assist with stationary and internet costs associated with study.







# Customer-focused Excellence

In August 2022, Lively achieved a remarkable milestone by winning the prestigious Customer-focused category of the Bendigo Business Excellence Awards.

This recognition underscored our commitment to our participants and their families, showcasing the impact of our workforce's unwavering dedication to high-quality care and providing genuine choice and control for people living with a disability.

This accolade not only celebrated our service

delivery but also highlighted the power of community-driven initiatives, acknowledging our impact beyond the individuals we support, leaving lasting benefits on the communities touched by our services.

We're incredibly proud of this achievement as a not-for-profit organisation and thank the tireless work of our staff, board, volunteers and supporters. This is a testament to their commitment to building a more inclusive and caring community, inspiring others to follow in their footsteps.





**BENDIGO**  
127 Mitchell Street,  
Bendigo 3550  
1300 799 421

**BENDIGO**  
102B / 141 Mollison Street,  
Bendigo 3550  
1300 799 421

**MILDURA**  
138 Lime Avenue,  
Mildura 3500  
1300 799 421

**BALLARAT**  
15 Dawson Street South,  
Ballarat 3350  
1300 799 421



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