



## **Chairperson and CEO's Joint Annual Report 2020/21**

As always, our focus this year was on supporting Lifeplan customers to move towards their vision of what a good life means for them. This year also saw the continued impact of the COVID 19 pandemic with a number of short lockdowns disrupting our customer's services. This was also a year of major consolidation and rebuilding of the organisation to ensure its sustainability in the new NDIS environment.

After over 20 years of service, former CEO and more recently Operations Manager, Glen Young resigned from Lifeplan. The Board and staff thanked Glen for his many years of service and commitment to customers, their families, staff and to the organisation as a whole. In October 2020, Greg Massam was appointed as the new CEO. After a period of review, the organisation was restructured to give clarity and accountability to existing and newly created roles, provide better support to the 'on the ground' team and to optimise the level of service provided to customers. Newly appointed roles included the People and Culture Manager, Team Leader, Quality & Audit Officer, a new Operations Manager and a second scheduler. Even with the appointment of these new roles, the restructure resulted in a reduction in overhead costs, which is crucial for the organisation's long-term future.

This year also saw a strong focus on improving the financial transparency and viability of the organisation. External consultants were engaged to assist with the regular production of financial accounts, the FY22 budget and a 100-day plan to put the organisation onto a path to sustainability.

This year has also seen the introduction of a new customer management system, a new finance system, an online induction system and an online HR management system. This has delivered a number of efficiencies that we will benefit from in the years to come.

In July 2020 Lifeplan was delivering services to 196 customers. By June 2021 the number of customers had decreased to 140. Many of these departing customers were inactive or receiving very few services. Nevertheless, now that the business has been restructured and has invested in new efficient procedures and systems, the focus is growth and continuous improvement for our new and existing customers.

With the introduction of the new NDIS Quality and Safety Standards in December 2020, all policies and procedures were rewritten to meet the new standards. Lifeplan's first NDIS reregistration process commenced in March 2021 with a desk top gap assessment and will conclude with a full audit in November 2021.

The COVID-19 pandemic continued to have a significant impact for customers and the organisation in 2020/2021. Many of our customers reside in supported accommodation and, as per government directives, were closed to all but essential services during the lockdowns. This, like last year, impacted the annual result.

The annual customer survey again showed that our friendly and caring support workers are what customers like most about Lifeplan. No doubt our great support workers are the main reason our customers also gave us a good “net promoter score”, showing that they would recommend us to family and friends.

We would like to sincerely thank our fantastic support workers and service coordinators that deliver services to our customers and the team backing them up in the office. The team has been called upon greatly in 2020/2021 to learn new systems, read many new policies and attend newly required training. They have done this while still providing high quality services to our customers.

There has been a number of changes to Lifeplan’s Board of Directors in 2020/2021. During the year Anne Montgomery, Margaret Stewart, Mehdi Nawa and Heather McIntyre resigned from the Board. The Board would particularly like to thank Anne and Margaret for their long service and commitment to the organisation. Bron Pike continued as Chairperson and Vicki Martin continued as Treasurer. The Board welcomed Amy Agüero as Secretary as well as Lisa McGinnis and Peter McCafferty as board members. We would also like to thank Shzan Plandowski and Andrew Birch for their contributions to the Board in 2020/2021 in their Board Advisor roles. We welcome everyone’s diverse range of skills and areas of expertise. We would like to warmly thank everyone for how generous they have been, and continue to be, with their time and expertise and recognise that this is a volunteer role in what has been quite a busy year supporting the organisation to be financially viable and a sustainable NDIS registered organisation.

Finally, Lifeplan exists to support its loyal customers. We feel privileged to be able to work with them to achieve their individual life goals. We thank them for their ongoing support and look forward to continuing our relationship in the years to come.



Bron Pike  
Chairperson



Greg Massam  
Chief Executive Officer