

# Outlook AGM Report 2019

Providing services  
that support people to  
realise their goals

**Outlook**  
an inclusive society for all

# President and CEO report

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**T**he last 12 months have been yet another exciting and transformative year for Outlook. Indeed, every part of the organisation has experienced growth, renewal and transformation as Outlook works towards delivering our ambitious 3-year Strategic Plan (2018-2020), underpinned by a guiding vision of creating a more 'inclusive society for all'.

## **National Disability Insurance Scheme**

The most significant among these changes has been the roll out of the National Disability Insurance Scheme (NDIS) in our region. While there have been many well-publicised implementation challenges across the sector associated with the NDIS, Outlook remains firmly committed to the vision of the Scheme and continues to devote substantial resources to ensure that our customers are best served in a new environment of choice and control.

This will likely place near term demands on Outlook's resources, however, we believe the organisation is very well placed to meet these challenges and will continue to expand our services in a consumer-directed market.

## **Disability Employment Service (DES)**

Our DES offering commenced FY2019 under a radically new 5-year grant framework in which guaranteed market shares were removed, the number of competing services in our region increased three-fold and a new 52-week outcome payment was introduced.

Despite these significant headwinds, Employment Services delivered a strong outcome, improving on its Star-rating, maintaining client numbers and delivering a robust financial result. Michael Upston (GM Employment Services), Heather Bulte (Operations Manager) and the wider DES team are to be congratulated on this outstanding result.

## **Outlook Environmental**

Outlook's social enterprise, Outlook Environmental, continued its strong growth securing waste management contracts with the Westgate Tunnel Project, Metro Tunnel Project, all Level Crossing Removal Programs in Victoria as well as a range of other State-significant infrastructure projects. Outlook was also successful in securing a 5-year contract to manage the Melton Recycling Facility, on behalf of the City of Melton commencing from 1 July 2019.

These mandates ensure that Outlook Environmental can continue to deliver long-term, sustainable employment opportunities for people with disability well into the future. These achievements were recognised with Outlook being awarded the 'Most Innovative Social Enterprise' at the Social Traders Awards 2018.

## **Community Centre**

Outlook's Community Centre welcomed over 60,000 visitors this year surpassing previous records. This is a testament to the work of Alison Ryan and her experienced team who have developed an engaging program of activities and competitive room hire service that meets the diverse needs of the Cardinia Shire Community.

## **Our Volunteers**

Outlook is indebted to its vibrant and committed volunteers, which now number over 70, who underpin our ability to deliver services to the community.

During the year Outlook welcomed a new Volunteer Coordinator Julie Gabell from the Olivia Newton-John Cancer Wellness and Research Centre, who brings a great depth of experience to the role and carries on the fantastic work of Sarah Kelly who is now a Senior Support Coordinator within our Disability Services Division.

‘On behalf of the Board and Senior Management Team, we would like to extend our sincere thanks and appreciation to our customers and families that allow Outlook into their lives every day.’

Creating  
and facilitating  
sustainable  
opportunities

for people  
with a disability  
to live, work  
and play

### Board of Governance

Our Board of Governance continues to evolve as Outlook expands its reach and impact. Outlook welcomed Greg Cuthbert as Vice President on the Board of Management from October 2018. Greg joined as a Board Member in April 2017 and brings a wealth of experience as the Head of Strategic Project Execution for Australia Post. During the year, our long-serving Board Member Adam Khan retired from the Board, marking 5 years of service to Outlook. We thank Adam for his valued advice and input and wish him all the best for the future.

### Our sincere thanks

On behalf of the Board and Senior Management Team, we would like to extend our sincere thanks and appreciation to the customers and families that allow Outlook into their lives every day, to our incredible staff and volunteers who embody Outlook’s values and to our many partners and stakeholders that support our vision for a more inclusive society. We look forward to an exciting year ahead.



**Edwin Hume**  
President



**Sam Sondhi**  
CEO

### Our Vision

An inclusive society for all.

### Our Mission

Creating and facilitating sustainable opportunities for people with a disability to live, work and play within our communities.

### Our Purpose

We exist because...

- All people have the right to participate in all parts of society and should be provided with that opportunity.
- Communities are stronger when they are inclusive and connected.
- People with a disability and their families want an ally in facilitating a more inclusive community.
- Providing opportunities through social enterprise increases inclusion in a sustainable way.

# Advocating against family violence

Nine out of ten women with a disability experience violence

Outlook has been very active in the community, to raise awareness and bring about change, in relation to family violence.

We have hosted and participated in a number of events, in partnership with Cardina Shire Council and Aligned Leisure, and participated in other events such as 'Cheese for Change' day across the organisation.

Outlook provides training to staff and customers to raise awareness of the issues and supports available, and has a particular focus on violence against women with a disability, as nine out of ten women with a disability experience violence or abuse in some way.

DCEO Anne McCormick and employee Michael Wright, who is very actively involved in organising events and advocacy, attended and presented to the 2018 Stop Domestic Violence Conference (QLD, December 2018), along with Tricia Malowney, Disability Advocate.

Below left: 'Cheese for Change' day raised valuable funds for the prevention of violence against women

Below: DCEO Anne McCormick with guest presenters and the silent auction table at our Family Violence event





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# Grants and donations

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Outlook extends its sincere thanks for the generous contributions we received during the year from the following organisations...

## Grants

- **Cardinia Shire Council – Health & Wellbeing Grant** to provide over 50's mens strength training programmes.
- **Cardinia Shire Council – Public Internet Access Grant** to assist the Community Centre to provide internet access to members of the public.
- **Good Things Foundation – Activation Grant** for Be Connected Network to help support older Australians to gain digital skills.
- **Cardinia Shire Council – Together We Can Grant**
- **Department of Social Service** in conjunction with **Impact Investment Australia – Impact Investment Grant**
- **Australian Federal Govt Community Grants Hub – ADE Wage Supplementation**

## Donations

- **Berwick Opportunity Shop**
- **Cardinia Crafters**
- **Garry White Foundation**
- **Haulaway Services**
- **J Wilcox**
- **Pakenham Opportunity Shop**

# Treasurer's report

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I am pleased to say Outlook delivered a surplus of \$68,997 before the revaluation of land and capital grants, in what was a challenging year with the introduction of the NDIS and some difficult operating conditions. The result after the revaluation of Land and Buildings is \$284,406.

Our accounts show operating revenue was \$15,666,594 – up by almost \$1,234,186 or 8.5% on the previous year.

As mentioned, it was a challenging year in some areas with Disability Services transitioning to the NDIS resulting in less income and a proposed new site in our Commercial Division not occurring during the year.

In line with previous years the breakdown of revenue for 2018/19 shows Outlook Environmental remains our largest revenue stream (61%).

Expenses before depreciation increased to \$14,893,042 from the prior year amount of \$12,383,250. The breakdown of expense categories for the year shows that labour remained our main cost category, at 60.2% of all annual expenses (compared to 60.5% last year).

The summary of Outlook's Statement of Financial Position (or Balance Sheet) as at 30 June 2019 shows assets rose from \$17.24 million to \$18.23 million, while overall net assets stood at \$14.85 million, up from \$14.54 million.

The net result of these asset movements is minimal and in what was a transition year due to NDIS, Outlook was able to maintain strong cash and financial assets. These amounts stayed in line with the prior year and the Cash balance at the end of the year stood at \$3.25 million a slight decrease on the prior year balance of \$3.28 million.

The 2019 surplus while not as large as the prior year result allows outlook to build on the strong platform of growth it has delivered over the last number of years. Our cash balances and continued asset growth show Outlook remains in a strong financial position.

Looking ahead a little, the board is very aware of the challenges facing Outlook with NDIS and growing opportunities in different areas and have begun the 2019-20 year supporting Sam and the executive team in aligning the organisation to deal with these challenges and opportunities.

I believe the 2018/19 results indicate that we continue to have a very strong and responsible financial management culture throughout Outlook and we are fortunate to have the skills, enthusiasm and dedication of Ariana Evans – our CFO. Ariana leads an effective finance team who deliver the results to the board in a timely and accurate manner. During the year they assist me and the Board as a whole in making sure Outlook complies with the many regulations and standards that control financial reporting and governance.

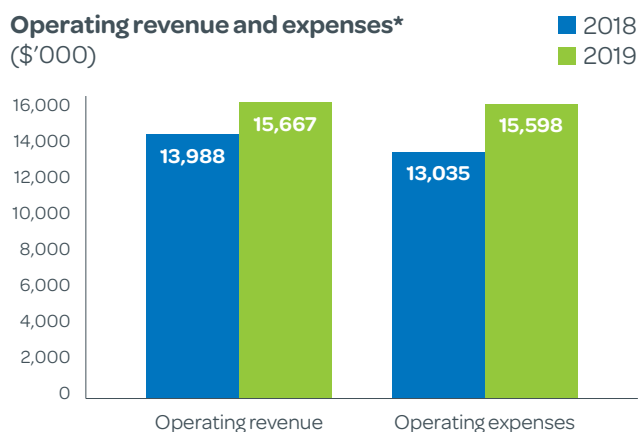
I would like to thank Ariana and her team for the close working relationship we have had, and for all their work with the Board as a whole.

This is my first full year in the role of Treasurer and I would like to thank the Management team and Board for their support during the year. I would particularly like to thank my fellow board member Lisa O'Sullivan who as a member of the Finance and Risk Management (FARM) Board Sub-Committee has had to chair the committee a number of times during the year in my absence.

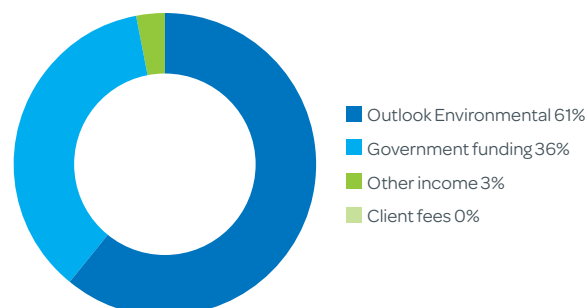
I do anticipate a positive future for Outlook and I have every confidence in the Board of Management, the Senior Management Team, staff and volunteers who will continue to ensure that Outlook is seen as a leader in the sector.

**Derek Madden**  
Treasurer

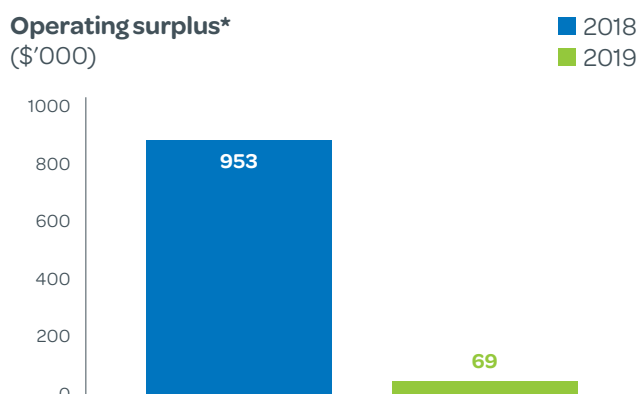
### Operating revenue and expenses\* (\$'000)



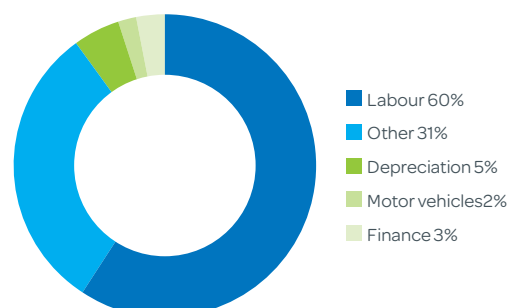
### Breakdown of revenue streams 2019



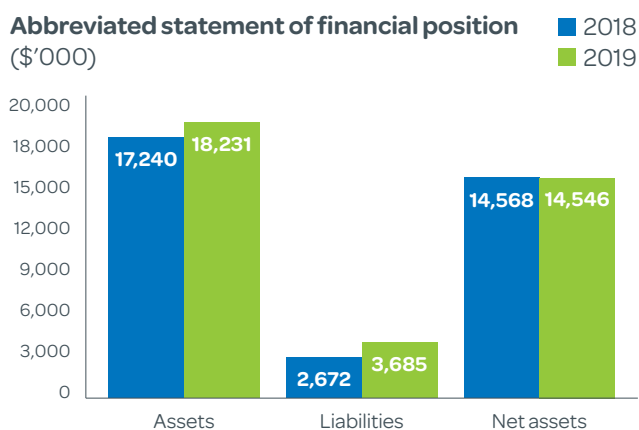
### Operating surplus\* (\$'000)



### Breakdown of expenses categories 2019



### Abbreviated statement of financial position (\$'000)



'I do anticipate a positive future for Outlook and I have every confidence in the Board of Management, the Senior Management Team, staff and volunteers.'

\*excluding grant income and expenses



# Outlook Environmental

Operating under our Commercial Division, Outlook Environmental is one of the largest social enterprises in Victoria. This substantially increases our ability to offer employment for all people, including those with disability, through a financially successful, inclusive business that creates broader social outcomes for individuals and communities.

Over the last financial year Outlook Environmental has seen a number of changes, through growth of the business and the departure of Ross Cheesewright, GM of Commercial Services, to pursue other opportunities.

Ross was with Outlook for more than eight years and combined his engineering background with experience in the waste industry to help set the foundation for our current social enterprise. Outlook acknowledges Ross' contribution with heartfelt thanks.

As a social enterprise we operate a sustainable business, returning social, environmental and financial outcomes to the community and our partners. As *Social Traders* characterise it, we – as a not-for-profit – are 'suppliers that put purpose alongside profit'.



Outlook Environmental has over 105 employees with 40% of who have a disability and 70% identifying as being from a priority job seekers group, including long term unemployed, asylum seekers /refugees and those with a mental illness.

We have been successful in securing waste contracts for most of the large infrastructure projects around Victoria, including Metro and Westgate Tunnels, Western Roads Upgrade, Mernda Rail Extension, Rail Infrastructure Alliance and Level Crossing Removals. Outlook receives waste from these projects at our Darebin and Hampton Park sites and diverts up to 95% of the material from landfill through resource recovery. From January to June 2019, we received 3,417 tonnes of waste from these projects.

Outlook Environmental has over 105 employees, of who 40% have a disability and 70% identify as being from a priority job seekers group, including long term unemployed, asylum seekers /refugees and those with a mental illness.

Outlook also expanded its footprint during 2019, successfully winning a contract with Melton City Council to manage their waste recycling facility – including a recycled goods store – commencing 1st July 2019.



40% of employees have a disability

Achieving up to 95% diversion from landfill



Over the next two years the Council will undertake extensive improvement works to the site to further increase resource recovery rates.

The Council, in conjunction with Outlook, will officially open the site on 28th October 2019. This new partnership has created exciting opportunities and enabled a smooth transition to the site.

We are also looking to expand further west, with a new site currently being investigated. This will increase jobs and provide further opportunities for equality and diversity amongst our workforce.

Outlook are always open to obtaining new partnerships that align with our mission and provide social impact.

#### Ariana Evans

CFO/GM of Commercial Services

Left: The Site Management Team at our Hampton Park facility

Above: James Wynne, Regional Manager Western at our Melton site

#### Some of our key customers

**JOHN HOLLAND**



**McCONNELL DOWELL**



#### Some of our key projects

**MERNDARAIL**



# Outlook Employment



Travis has transitioned from our STEPS to Employment Readiness program to our DES

Outlook Employment assists people with disability to find and maintain paid employment in the Casey Cardinia area. Operating offices in Pakenham, Narre Warren and Cranbourne, we have assisted more than 300 people with disability secure meaningful employment over the last year. In addition, Outlook assists job seekers to access appropriate education options that will help them achieve their career goals. We have worked with over 600 employers in the last year.

## Contracts

In June 2018, Outlook Employment successfully achieved a strong star rating under its Federal Disability Employment Services Contract (we are currently not permitted to publicly disclose the actual rating). In July 2018 we also commenced a new Disability Employment Service (DES) contract for the period up to 2023. A great result by the employment team in what is a very competitive market (we now have three times as many competitors in DES).



Another big feature of the last year has been our collaborative work with other Outlook divisions including Disability Services, Commercial Services and the Community Centre.

## Disability Services

The continuing collocation of DES and Disability Services at Narre Warren, and working closely with our STEPS program at Cheltenham, is providing avenues for STEPS customers to transition to DES at the end of their Employment Readiness Program. We are now seeing these motivated young job seekers gain meaningful

permanent employment, a life-changing accomplishment that sees them achieving similar outcomes to their peers from mainstream schools.

This program is growing both our geographical footprint and number of participants. We look forward to a positive ongoing relationship that provides sustainable paid employment outcomes for young people.

## Commercial Services

We continue to work with the Commercial Services Division through placement of candidates into our environmental work sites and partner businesses, through to our labour hire service.

## Community Centre

This relationship has led to a number of benefits:

- A range of educational outcomes for our participants, giving them skills that enhance their employability.
- The development of motivational programs for job seekers, run under the Community Centre banner by Employment Services staff and other trainers.

Overall, this has been a good year. Commencing the DES Contract (2018-23) and achieving strong outcomes – in spite of greatly increased competition – while maintaining quality service provision and financial viability has been the standout achievement for Outlook Employment. Outlook, as a whole organisation, has a suite of service offerings that make us unique in a crowded market for DES. Consolidating our place in the new contract has been crucial to our future success in DES. I appreciate the support of a strong employment team that has made this success a reality.

**Michael Upston**  
GM Employment Services

# Outlook Disability Services

95% of our  
Disability Services  
customers have  
fully transitioned  
to the NDIS

The National Disability Insurance Scheme (NDIS) was introduced in the Casey Cardinia region from September 2018. The NDIS aims to give Customers more 'choice and control' over the services they access. This flexibility of service delivery has long been a feature of Disability Services but the NDIS has given us the opportunity to expand our offerings and the flexibility of service we deliver.

As of the end of the 2018/19 financial year 95% of disability service Customers had fully transitioned to the NDIS. Each person has an individual plan with goals to suit their personal needs. To manage this transition effectively and to ensure the ongoing viability of the program Disability Service embarked upon changes to the structure of the service delivery model to meet customer needs and NDIS requirements.

The programs we are currently offering include:

**Steps to Employment Readiness** is specifically designed to provide individualised support, training and work readiness activities. Steps to Employment Readiness provides a realistic pathway to achieving future employment through further education training, volunteering, work trials in readiness for future employment when transitioning to Disability Employment (DES) or other employment options. The Steps to Employment Readiness offering is now available from both the Narre Warren and Cheltenham centres in conjunction with our DES.

**Steps to Independence** works with individuals to obtain life skills and experiences that enhance independence. This service commenced in the Casey Cardinia Region in 2018 and expanded to include Cheltenham in 2019.

**Steps to Participation** continues to explore dynamic options and services looking at ways people can actively engage with their community. Steps to Participation team

now has an additional Team Leader and Practice Lead who manage a large customer base in this program. Respite and leisure has always been a focus for the program and this will be expanded in the coming year to widen Customer choice.

## Supported Employment

During 2018/19 Supported Employment roles were offered at our Officer, Mornington, Reservoir and Hampton Park sites. Our approach sees supported employees working as integrated, integral team members at our Environmental sites.

The opening of the new Melton site will provide further opportunities for Supported Employment roles.

## Staffing

Roxanne Higgins, General Manager Disability Services oversaw much of the preparation for an initial transition to the NDIS. Roxanne left Outlook in December 2018 to pursue other opportunities, and I'd like to take this opportunity to thank her for her work in what has been a significant transition to a different service delivery model.

There have been substantial changes in staffing over the last year that have enhanced Disability Services position to maximise the opportunities provided by the NDIS for Customers while ensuring we run a viable Disability Service within a very competitive market.

## Michael Upston

Acting General Manager Disability Services

# Outlook Community Centre

Community centres and neighbourhood houses play a vital role in building and strengthening communities. Outlook's Community Centre provides valuable social, recreational, educational and training opportunities to support people of all ages, abilities and backgrounds to achieve their full potential. We are proud to bring together members of the community to participate in learning and experiences that contribute to their social, emotional and economic development as individuals and members of the community.

The Community Centre is open to the public for approximately 90 hours each week, during which time over 1,000 people enter our doors. In 2018-2019 there were over 240 classes providing opportunities for a diverse range of community members – computer training, professional/employment skills, self-development, health & wellbeing, and support groups.

Outlook partnered with COTA (Council on the Ageing) to provide the *Aged Care Navigator Trial Hub*. This project supports people to learn more about Government

supported aged care programmes and how to access them. A series of information sessions, drop in days and one-on-one appointments have been provided to the community.

The Community Centre also received a grant in relation to *Be Connected*, a new Australian Government program aimed at increasing the confidence, skills and online safety of older Australians when using the internet. This has enabled us to provide one-on-one group training and seminars to seniors at no cost.

The Community Centre is open to the public for approximately 90 hours each week, during which time over 1,000 people enter our doors.







Our relationship with Employment Services has resulted in many benefits for those seeking employment – providing employability skills, resilience, and increased confidence to help improve employment prospects, health and wellbeing.

Room hire at Pakenham continues to be popular with the community, local groups, organisations and businesses. The venue is used seven days and nights a week, providing a platform for community connectedness, networks and opportunities for people in their own community. Churches, registered training organisations, service organisations, sporting groups and community members use the centre for a wide variety of purposes.

The Community Centre also plays an important role in providing a platform that supports the development of individual capabilities, fosters connections and nurtures community resilience and wellbeing in people of all abilities.

### Alison Ryan

Manager Community Centre

Far left: The COTA project team

Centre left: Laurie participates in the *Be Connected* program

Left: The men's evening discussion group

Below: Room hire at Pakenham continues to be popular with the community, local groups, organisations and businesses



# Outlook Corporate Services

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**C**orporate Services and Finance teams provide support to the organisation that includes risk mitigation, quality, learning and development, HR, IT, OHS, RTW, marketing, volunteering, Finance, Property Management, Maintenance and Contract Management.

## **New Staff Positions**

Corporate Services has been very busy supporting the growing organisation and to enhance this support two new positions (part time) were established; Training Coordinator – to focus more specifically on training needs across the organisation and provide assistance to staff to meet those needs; Quality Systems Coordinator – initially focused on transitioning the Document Management System to SharePoint, reviewing and continuous improvements to our existing system and setting up a more robust internal audit management system; Return to Work and Safety Officer supporting the Return to Work and Safety Coordinator in our Social Enterprise.

## **IT Systems**

An IT Systems Security Audit and mapping of Business Process to IT solutions was conducted in Q4 of 2018.

The security audit highlighted a few areas where additional measures could be put in place to further strengthen our systems but overall our current measures were assessed as appropriate to meet organisational needs. The business process mapping identified the key processes the organisation would need to incorporate into any systems we purchase to support our business activities.

Scoping of appropriate business systems has been ongoing throughout the year and to date an online induction program (iinduct) has been implemented and projects to move to Office 365 and SharePoint commenced. As well as providing a cloud based platform

which enhances security and makes storage and sharing of information easier SharePoint will also host our new Document Management System.

A new OHS system has been selected and the project is underway to configure the system and roll it out to employees by mid November.

## **Compliance Standards**

Outlook successfully achieved recertification for ISO 9001, ISO 14001, AS/NZS 4801, DHSS and NSDS.

The Auditors observed that, in respect of Outlooks Quality Management System (ISO 9001), the system continues to be implemented and maintained to promote continual improvement in quality performance and has performed particularly well in identifying client needs and service delivery.

In respect of Outlooks OHS Management System (AS/NZS 4801) and Environmental Management System (ISO 14001), they are effectively implemented and appropriate to the activities for the organisation.





'As well as providing a cloud based platform which enhances security and makes storage and sharing of information easier SharePoint will also host our new Document Management System.'

We now have more than 70 volunteers

Both NSDS and DHHS audits were successful, with the Auditors particularly noting the passionate staff... across all of the areas visited... people accessing the services feeling respected and like 'one of the team'... enabled true employment integration where all employees, whether they may require some additional supports or not, were treated equally.' 'Clear focus on person centred service delivery that was reflected in practice and verified through staff and participant interviews.'

Outlook is now focused on the new Quality and Safeguarding Framework to ensure we meet compliance requirements of the NDIS Practice Standards.

#### OHS

A number of key staff across the organisation have completed or near completed their Certificate IV in OHS to increase skills and knowledge across the organisation at site level.

The new OHS, cloud based, system will increase the effectiveness of our management of OHS through a systematic and structured workflow that enables all aspects of safety to be simply and effectively managed.

#### Marketing

As part of our Marketing Strategy and Plan, Outlook has refreshed our website and is focused on increasing our digital presence through social media, particularly through the sharing of stories about the achievements of our staff and customers and new business opportunities.

**Debbie Barnard**  
GM Corporate Operations

Left: Outlook volunteer, Vicki, helping out in the Community Centre

**Outlook (VIC) Inc.**

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**Outlook**  
an inclusive society for all



Registered NDIS Provider