



halo  
CARE & SUPPORT



# Halo Care promotes independence with information for those thinking about and those who may require community care services and support

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## Carer support

Promoting independence with information and help for those who are caring for others



## Dementia support

Promoting independence with information and help for those who need support living with dementia



## Mental health

Promoting independence with information and help for those who may need assistance with the challenges of mental wellness



## Disability services

Promoting independence with information and help for those who may need NDIS, disability services and support



## Senior support

Promoting independence with information for those thinking about and those who may require aged care services and support



# How we can help

Halo (Home and Lifestyle Options) is a benevolent organisation committed to ensuring quality care to all who require support to remain active and independent members of our local community. We have been providing individual and innovative care tailored to our clients' needs since 1992.

Halo can assist you to negotiate the challenges you face. We can help you to reach your goal of remaining active. We can assist with ensuring you live a life filled with all the activity, community spirit and engagement that you wish to have.

Halo walks hand in hand with those caring for others. We can help you with information and assistance negotiating the aged care market place. We can help you when you are dealing with changing health needs and abilities of those you care for.



# The start of change

I am so pleased to present the annual report for halo for the year 2023. This has been a year marked by change, resilience, growth and a steadfast commitment to providing exceptional care and support to people receiving aged care and disability services in our community.

A year of change as we moved from a name that has served us very well for 30 years. We said goodbye to Southern Districts Support Association (SDSA) and hello to halo. As part of the name change I felt it timely to rebrand the organisation to ensure we had a new feel and a renewed commitment to excellence in the quality of services we provide. The decision to embark of such an enormous transformation was necessary because we wanted our name to:

- ✓ Say what we do
- ✓ Resonate with staff and the people we support
- ✓ Be one we are proud to represent and be associated with
- ✓ Allow for expansion outside the southern districts of Perth
- ✓ Be modern, professional and represent quality
- ✓ Recognise our Christian foundations and our upholding of Christian values and behaviours in all that we do

Around the time we were changing the name and brand of the organisation, we were working on the new Strategic Plan. It was important we had as much input as possible into this by those needing to deliver on it and so the Board and staff had sessions to ensure these voices were represented. We now have a strategic plan that will help guide us over the next three years that is focussed on quality of services to those receiving support, risk management, growth and sustainability.

We have required to be resilient in our approach as there have been a number of significant changes in the landscape of our business, in particular, aged care. With necessary reforms to the way services are delivered, including legislation, compliance obligations, quality improvements and wage changes for employees, it's been a busy year ensuring a smooth translation and transition of these factors to those we support and those we employ. We have also had a number of internal changes with our technology to allow for greater efficiencies, security and more modern ways of doing things.



Our growth strategy to date has been to grow the business organically using a simple and effective method providing exceptional quality services and diversity in our offerings. I am delighted to report a significant increase in our annual turnover and diversity of our offerings by including a new program offering friendship to people receiving aged care services, called Bespoke Befriending.

Our steadfast commitment to those we support has seen us not only continue to deliver compassionate and person-centred support to empower those we support to live independent and meaningful lives but a complete dedication to improvements to the quality of services. We have expanded our quality and health and safety department to include a manager, a coordinator and an officer, ensuring the work is prioritised and achieved. We have also seen a greater collaboration with other organisations with aligned values and a number of developing partnerships there to assist us in enhancing the experience of service to those we support.

As we move into the next year, our focus remains on continuous improvement, growth and innovation. We are dedicated to further enhancing the quality of our care, expanding our reach and further adapting to the changing landscape of support services. We will continue to invest in technology and our people to ensure we are at the forefront of best practice.

In closing, I would like to extend my heartfelt gratitude to our dedicated staff, passionate volunteers, supportive Board members, collaborative partners, the community and very importantly those we support and their families for believing in us, supporting us as we go through change and trusting us with their loved ones. Together, we have made a last impact on those we support and I am very excited about the opportunities that lie ahead.

*Bridget Harvey*  
CEO - halo

*“ Our focus remains on continuous improvement, growth and innovation ”*



# Chair report 2023

The 2023 financial year started with us (the Board and the new leadership team) working on a new strategic plan. It was a great opportunity to reflect on things we hold dear and want to keep and also think on things that we want to do better or in some cases more of. Things that didn't change were our vision, which remains:

“As a Christian Association, halo will be recognised as an agency of choice for providing aged and disability care. The passion and commitment of our people will provide the basis for innovative, high-quality services and programs that enable and transform the health and well-being of the individual”

and the mission which underpins it, which

**“Is to provide practical services in a respectful manner to enable the individual to remain living in their own home with dignity and confidence and where possible to enhance their social interaction and contentment in life.”**

We undertook a program of work to implement new technology to better equip us and to help us be more efficient and effective. By all accounts it was a bit of a bumpy ride, but most the work is now behind us. Those who spent many long hours setting the new systems up most likely have stories to tell, but looking in from the outside it has brought people together and encouraged us to challenge how we did and do things. We do need to thank our valued clients and their extended support networks for their patience as we made this transition, but we did this because we want to serve you better.

Our professional development as a Board continues and I recently completed the Company Directors Course with the AICD – the same one Thomas Parayil (Deputy Chair) did last year. It is a challenging course, but it is not the end for any of us and we look to fulfil our duties as directors more effectively by staying abreast of the issues that impact our organisation – strategy and risk is a seesaw in constant tension.

We have been blessed and we seek to honour the trust placed in us by our funders, our staff, and the people we serve – our clients. We do this for them, knowing the great blessing and privilege it is to serve those entrusted to our care.

“And let us not grow weary while  
doing good, for in due season we  
shall reap if we do not lose heart.”  
Galatians 6:9 (NKJV)

May God bless and keep you all.

*Adrian Bennett*  
Chair of Board





# Get to know us

## Our story



For more than 31 years, Southern District Support Association – now halo – has been caring for those who need it most. We've been providing services to help make life easier for people across the South Metro region, encompassing the City of Armadale, Gosnells, Canning, Cockburn, and surrounds, as well as semi-rural area of Serpentine Jarrahdale Shire.

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## Our growth



1992: Southern District Support Association (SDSA) was established by a small group of Christian people, to help address the drastic need for respite and specialist transport needs for the elderly and those with disabilities in the South East Metro area. From humble beginnings, staffed by volunteers in a small shed offered by the church, the increased demand from the local community led us to seek additional financial support and partners for growth in our activities and service area.

1996: SDSA received its first round of funding from Home and Community Care (HACC), Health Department program. With our aim to provide a range of services that provide basic support to seniors and people with disabilities and their carers, so they can remain living independently in their homes and the community.

2022: With a new and energised leadership team, we have grown significantly since this time and now have 115 employees and offer support through 8 programs.

2023: Name change from SDSA to halo along with new branding and strategic plan to grow further and extend the reach of the services we provide.

## Our Vision



As a Christian Association, halo will be recognised as an agency of choice for providing aged and disability care. The passion and commitment of our people will provide the basis for innovative, high-quality services and programs that enable and transform the health and well-being of the individual

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## Our Mission



Our mission is to provide practical services in a respectful manner to enable the individual to remain living in their own home with dignity and confidence and where possible to enhance their social interaction and contentment in life.

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## Our Values



Our values of Justice, Respect, Service, Care and Unity are paramount in assisting us to achieve our mission of offering flexible, dignified and responsive care services to enable our clients to maintain their independence, connect with their community and strengthen carer relationships.

we are for you *wherever you are*

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# Our approach

It's your life and your story; we value and respect your freedom to make choices and live in an active, healthy way at every stage of life.

This means doing things with you, not for you, to help you maintain or reclaim the highest quality of life. We'll help you focus on the things that you can do (and love to do) to build on your strengths, nurture independence and build self-esteem.

We encourage you to be involved in the creation of your Support Plan, so it can include your goals for what you would like to achieve, and how we can be there to help you reach them.

It's all about enhancing your independence. You may not need ongoing service, or may only need a reduced level of service over time. As you are able to do more for yourself; your dependence on services may reduce, allowing you to be able to live actively and independently in the community for as long as possible.

Together, we build your social, emotional and physical wellbeing, offering our help when needed. That's the halo's approach.

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## Our people



**Bridget Harvey**  
CEO



**David Selvendra**  
CFO



**Wendy Brown**  
Manager of Operations



**Veronica Phillips**  
People & Culture Manager



**Jodie James**  
Quality & WHS Manager





*Compassion is passion  
within the heart*





## Our people. Our culture.

We remain committed to developing a workplace where our people can feel safe, bring out the best out in each other and achieve their true potential. Our staff are invited to attend exciting events, keep communication honest and inviting feedback from all levels of the business, this fosters great working relationships.

We are proud that our journey has begun with reconciling with First Nations People and embedding a deep understanding of the culture that was here long before us. This involves a knowledgeable Aboriginal Cultural Advisor joining and guiding us through the origins and our future prospects to engage fully with the country in which we work on.

In conclusion, People and Culture have played a pivotal role in supporting the growth and success of halo. We remain committed to attracting, developing, and retaining top talent, fostering a positive work culture, and ensuring we maintain compliance. We look forward to a successful year ahead strategising diversity and retention and are excited to do so.





*"To care for those that once  
cared for us is one of the  
highest honours"*



# Our growth in detail

It has been a very exciting year for the whole team at halo celebrating our 30th Anniversary and launching our brand-new name!

In Operations we were also busy rolling out our new client management system, Visual Care, to assist our scheduling team in maintaining consistent client rosters and to foster seamless communication among our various teams. The new system also allows our clients to have access to their live roster and budget and they can request changes to their supports via the client App.

This year we have seen substantial growth in our client base and have provided a total of 51,082 services supporting over 1,100 clients to remain living at home safely and independently.

We have increased staffing resources in our Scheduling and Care co-ordination teams and introduced two new Team Leader positions to support our staff in the community. We now have 94 support staff in our team - increasing from 65 last year. We have also introduced a pivotal role- Operations Manager. This position is dedicated to assisting the Executive Manager in ensuring comprehensive oversight of the various funded programmes we provide.

## Number of services provided 2022-2023



37,922

In home support services provided



6,518

Transport services provided



5,366

Gardening services provided



1,276

Clinical & Allied health services provided

Our dedicated support staff assisted clients with over 11,000 personal care services and our clinical and allied health team completed over 1,200 home visits.

We understand how important social connections are to our clients and our support staff provided 11,238 social support services while our Lifestyle Centre increased their Out and About programme from monthly to weekly. The Centre has also introduced a monthly swimming group and clients also regularly play Bingo at a local Bowling Club.

Our application for funding for the Aged Care Volunteer Visitors Scheme was successful, and as a result, we have introduced a "Bespoke Befriending" program. This program enables us to provide an exclusive in-home visiting service to clients receiving home care packages and permanent residents in aged care facilities across the Southeast Metro area. The program is specifically designed for individuals experiencing social isolation or loneliness and we match them to a volunteer with similar interests. We are working closely with nearby aged care facilities, enabling our volunteers to pay regular visits to their residents.

One of our home care package clients became a part of the program and shared how halo has made a significant positive impact on his life. We also received some wonderful feedback from our clients throughout the year, with one acknowledging the compassion and care given to her mother during her end of life, thanking the Care Coordinator and support team, for the care given to her mother enabling her to fulfill her wish to remain living at home. She expressed immense gratitude to the support worker who cared for her mother in the end stages of her life.

We look forward to the year ahead

*Wendy Brown*  
Executive Manager of Operations







*This is how change happens.  
One gesture. One person.  
One moment of time.*



# Our five guiding strategic principles for 2023 to 2026

These principles and measurable intentions will continue to guide us over the next three years

## ✔ Services

Quality Services delivering independence, connection and care

## ✔ People

Values driven, motivated, skilled, diverse people delivering our purpose

## ✔ Organisation

Governance, systems and infrastructure that sustains performance and culture

## ✔ Financial

Strong financial position, enabling quality outcomes

## ✔ Reputation

Well-regarded and positioned in the sector and beyond

These will always be guided by our values of

## Justice, Respect, Service, Care and Unity

And aligned with our purpose of Enriching Lives and supporting independence and our mission of offering flexible, dignified and responsive care services to enable our clients to maintain their independence, connect with their community and strengthen carer relationships

# Quality and Work Health and Safety

Reflecting on our 2022/2023 year brings me a sense of great pride, as often you need to take a step back to see just how far you've come. The challenges we have faced have all been met with a ferocity that is based on the team at halo sharing the same goal; to provide exceptional care and support to those who need us. One thing I know to be true is that you can only provide excellence in quality to the people we support, by taking great care of the people who provide that support; our hard-working and passionate team.

## Work Health and Safety

During the 2022/2023 year, halo continued to face the uncertainty of the pandemic and we worked determinedly to ensure the safety of our people. April 2023 also saw the introduction of new Psychosocial regulations, which is perfectly timed for halo as the leadership team has spent the past year focusing on improving the wellness aspect of our organisation including rebuilding how we work. Our recent Employee Wellbeing Survey showed that 86.88% of our people believe that Halo is a workplace that allows a good work-life balance. We take the health, safety, and well-being of our people very seriously, and I look forward to an even greater safety reach in the coming year.

## Quality

Halo's genuine passion for continuous improvement in the services we deliver has been in full force over the 2022/2023 year. This was also reflected in our Employee Wellbeing survey with a nearly 30% improvement on last year's results when staff were asked to reflect on how committed management is to continuous improvement. We undertook our Aged Care Quality Commission audit and faced the improvements required head-on. We strive for strong clinical governance with our new framework, as well as quality care which is the backbone of our Strategic Plan. 2023/2023 also saw the introduction of the Code of Conduct for Aged Care, which is in line with the NDIS Code of Code of Conduct which both aim to further strengthen the quality and safety of the services delivered to those who require them.

In line with our strategic plan, we have updated our Client Feedback survey and work has been done on improving the areas our clients have mentioned, including making sure we are reviewing services more regularly. Also, stay tuned for our Consumer Advisory Board which launches in the last quarter of 2023 for more improvements based on direct feedback from the people we support.

*Jodie James*  
Quality & WHS Manager

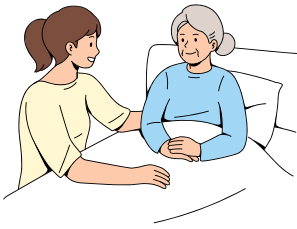


# Client Feedback Survey Stats

We received 218 responses to our March 2023 Client Survey



When asked if our staff are polite and helpful when our clients contact us 94.79% of respondents agreed. Not a single survey captured a disagreement in this area!



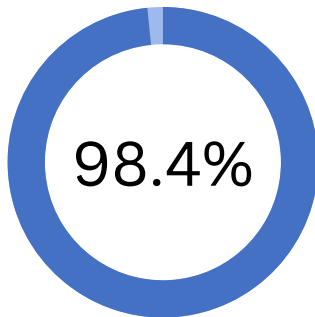
When asked if our staff are kind, caring and respectful, an amazing 92.89% agreed.



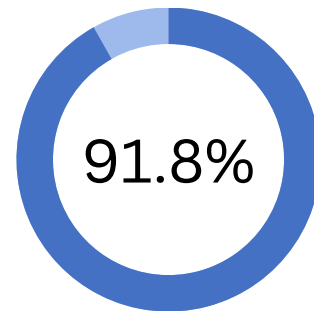
87.92% of our clients agreed we support them to maintain independence

# Employee Wellbeing Survey Stats

61 Responses from our staff



agreed halo is committed to creating a safe and healthy environment for staff, participants and visitors



of halo employees agreed their job has meaning and makes a difference



agreed that they enjoy their work at halo



# Working at Halo

Our people are at the heart and soul of what we do, and our workers personify what Halo is all about. The past year has seen massive improvements, achievements, challenges, and initiatives undertaken to support the growth and success of halo.

## Our Focus

Over the past year our focus has mostly been with the implementation of new HR Software, the focus of improving compliance and automating admin processes and achieving 90% paperless onboarding, which is dedicated to ease employee use and efficiency.

## Workforce

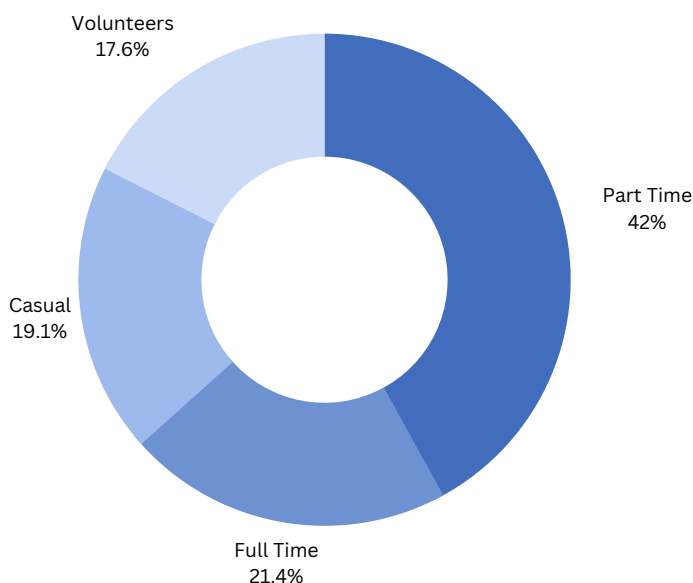
Our growth of worker numbers is indicative of the increased service demands at Halo, especially in the past 6 months, and offering a supportive workplace and flexible work rosters.

## Recruitment

We continue to attract top talent from a wide range of sources including job providers, offering members of the local community opportunities to work with us.

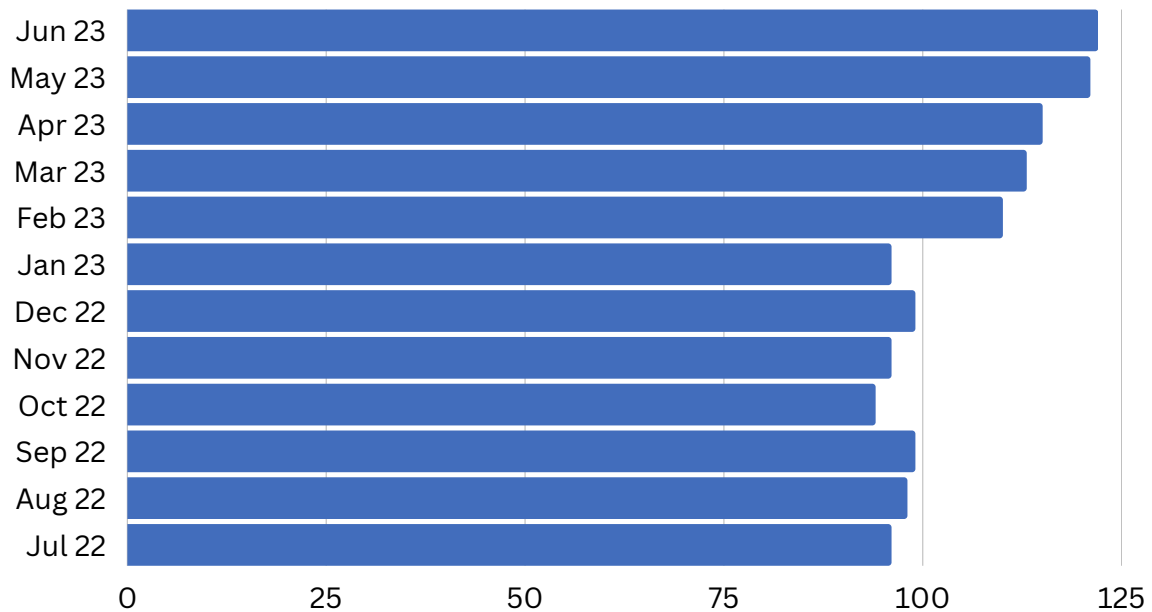
## Interns and Traineeships

We are proud to support local Universities and students by engaging with 2 interns this year, from a range of disciplines, to utilise resources offered for zero cost. We are developing our workforce by offering training and career opportunities including Traineeships in Aged Care for our Support Workers.



Our strong investment in employees is evident with an impressive yearly spend on training of \$73,246.00

## Employee growth by month



## Volunteers in 22/23

The cost-of-living crisis means more people are working more than ever, leaving little time for volunteering. Realising this, our efforts are limitless to attract and retain volunteers and we are committed to keep the momentum up.

We currently have 23 dedicated volunteers that donate their time to our two programs offered to our service users. Bespoke Befriending – visiting vulnerable people in the community. And Transport, where volunteer drivers take clients to their appointments, five days a week.

## Employee gender

Impressively, Halo consists of 80% women in leadership roles. Considering the industry predominantly features female workers, the focus for the next 12 months is on increasing male numbers but not just in leadership roles.

Male Support Workers make up only 8% of their total numbers.



*Veronica Phillips*

People and Culture Manager

# Navigating Cultural Pathways

As we reflect upon the past year's accomplishments and look ahead to our cultural journey, it is evident that our commitment to fostering inclusivity, respect, and understanding remains unwavering. Our endeavours have been directed towards creating a more inclusive environment that honours the Aboriginal and Torres Strait Islander communities and their rich cultural heritage.

## Aboriginal & Torres Strait Islander Policy Letter of Expression of Interest (EOI)

Our journey began with a resolute step as we drafted and submitted the Aboriginal & Torres Strait Islander Policy Letter of Expression of Interest (EOI). This letter served as a proclamation of our dedication to acknowledging and respecting the unique histories and contributions of these communities. Through this, we expressed our intention to create positive change through collaboration and partnership.

## Reconciliation Action Plan (RAP) Reflection and Progress

Our commitment was solidified with the inception of our Reconciliation Action Plan (RAP). We embarked on the process by reflecting on our existing policies and procedures, evaluating their suitability for First Nations people. This introspective examination paved the way for a more inclusive and equitable approach, aligning our organization's values with the values of the communities we serve.

## Developing RAP Working Group and Terms of Reference

To steer our RAP journey, we are looking to establish a dedicated working group. This team, comprising individuals from diverse backgrounds, worked collaboratively to define the Terms of Reference for the RAP Working Group. This foundational step laid the groundwork for our future endeavours.





## Drafting RAP Reflect Policies and Procedures

The drafting of the DRAFT RAP Reflect Policies and Procedures will mark a pivotal moment in our commitment to cultural inclusivity. Our policies and procedures were scrutinized to ensure they resonate with the needs and expectations of First Nations people. This ongoing process is a testament to our unwavering dedication to meaningful change.

## Board Engagement and Rebranding

Our Board of Directors took a front seat in this journey, engaging in discussions that fostered a deeper understanding of the cultural nuances and challenges. A Steering Committee was convened to guide the rebranding process, focusing on how to authentically represent our commitment. This included planning culturally rich events, such as featuring First Nations dancers at our grand opening, infused with engaging storytelling.

## Community Engagement and Partnerships

In forging partnerships, we aimed to expand our outreach to the Aboriginal and Torres Strait Islander communities. Collaborations with organizations like Meerilinga, Cahoots, and Langford Aboriginal Corporation have strengthened our efforts, opening doors to shared learnings and experiences.

## Creating Cultural Spaces and Community Building

We recognize the importance of providing physical spaces where the community can gather. By opening our doors to Elders for their meetings, we aim to offer a warm and welcoming environment for sharing stories, wisdom, and traditions. During NAIDOC week, a smoking ceremony was held on the grassed area outside, underscoring our commitment to meaningful cultural practices.

## Cultural Advising and Trust Building

Central to our journey has been the practice of cultural advising. By liaising closely with the community, we have established meaningful connections built on trust. This iterative process has ensured that our initiatives and strategies are culturally sensitive and relevant.





# halo

CARE & SUPPORT

we care  
for you  
*wherever  
you are*

[halocare.org.au](http://halocare.org.au)





# Finance and Corporate Services

FY2022/23 has been an eventful year for the organisation. At the beginning of the financial year, the focus was on the transformational changes to our internal processes which included implementing a new CRM system and a cloud based accounting software, along with building capacity through recruitment and training.

After embedding the new systems and processes, standing on solid grounds, the focus switched to preparing the organization for the future: As part of this the following improvements were made:

- ✔ To complement the new branding, we also renovated our reception area with a more modern and welcoming outlook. Our vehicle fleet was branded with customized number plates, new website was launched, social media platforms developed among many other changes to support the new branding.
- ✔ Concurrently, the focus was also on making sure the organization was financially compliant and kept an eye on improving the financial performance through price revisions and finding operational efficiencies to tackle the ever increasing cost of service.
- ✔ Towards the end of the financial year, the organization succeeded in bringing the payroll function in-house operating on a new payroll / HR platform which has enabled to support staff seamlessly between those functions.

Whilst throughout the year many IT related improvements were made taking advantage of technology, we have managed to strike the right balance to ensure vast majority of our clients who are less IT savvy are not left out. As a testimony to this statement, we still send paper based newsletters to more than 1000 clients, even though sending an electronic newsletter would only be requiring minimum administrative work. Currently we are working on a cyber-security project to make our organization even more safer for our clients and staff alike.

*David R S Selvendra*

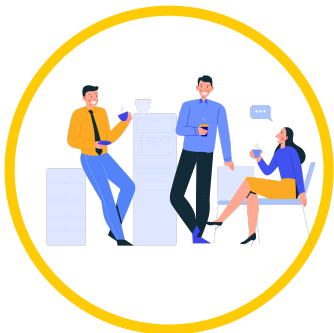
Executive Manager Finance and corporate services





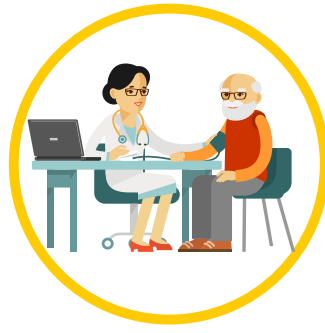
# Finance and Corporate Services

The organisation had made a sizeable investment in the vicinity of \$800K through the "Tomorrow project", a project that was designed to make drastic changes to our internal processes and systems. Even though the project itself faced monumental challenges due to Covid and staff transition, with a change in management approach, the project came to fruition and the organization has started benefiting from the investment during the financial year onwards.



100 +

Dedicated staff



1000 +

Clients supported



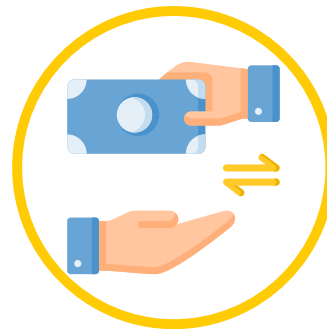
\$9,000,000 +

Annual turnover



10,000 +

Invoices raised  
annually



100,000 +

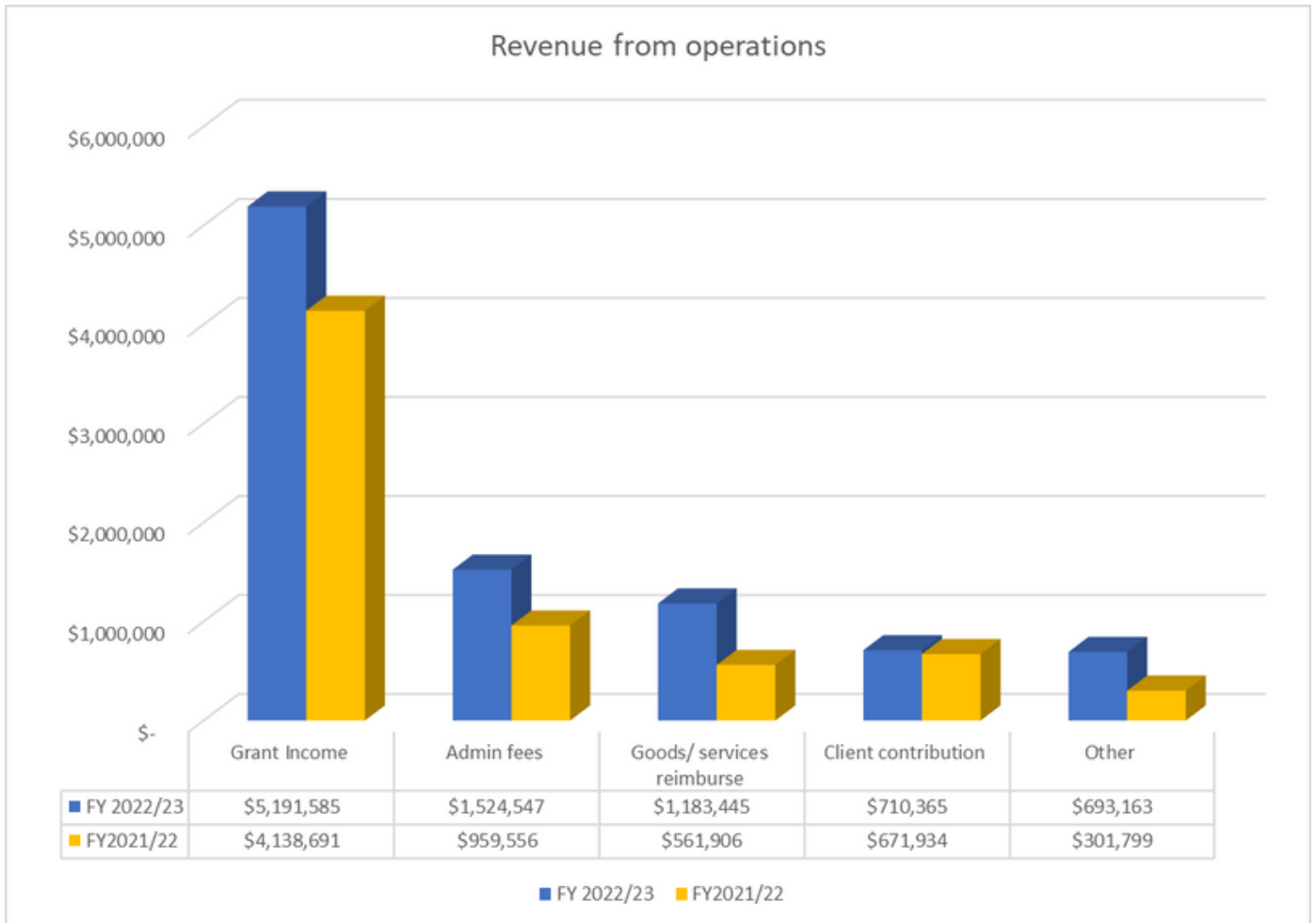
Transactions  
processed annually

**Yet, only 1 Purpose –  
Provide the best care for our clients**

# Financial report

As a not for profit entity, halo provide its Full financial report to the Australian Government's Australian Charities for Not for Profits Commission annually.

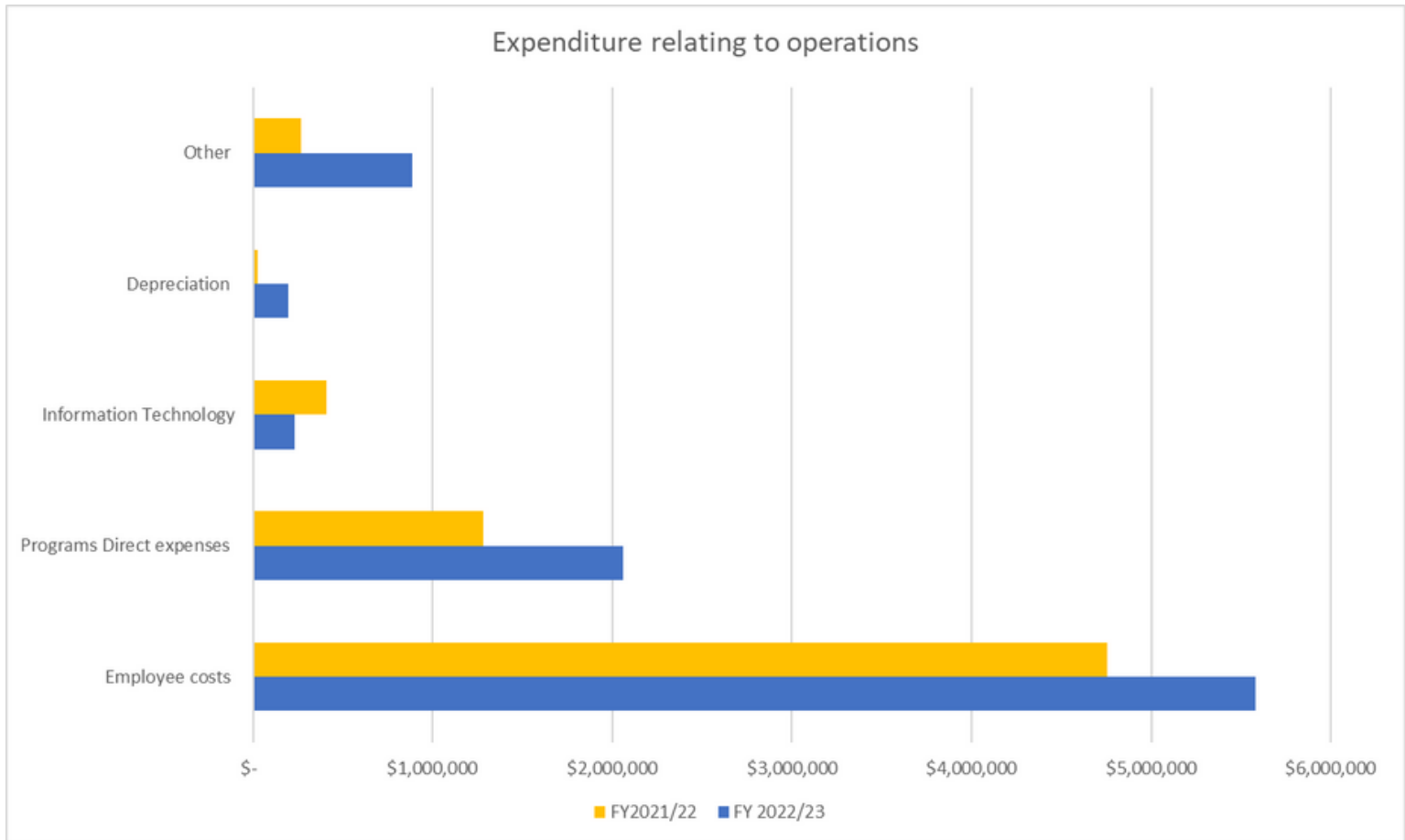
## Revenues from Operations



	FY 2022/23	FY2021/22
Grant income	\$5,191,585	\$4,138,691
Admin fees	\$1,524,547	\$959,556
Goods/services reimburse	\$1,183,445	\$561,906
Client contribution	\$710,365	\$671,934
Other	\$693,163	\$301,799
<b>TOTAL</b>	<b>\$9,303,105</b>	<b>\$6,633,886</b>

# Financial report

## Expenditure relating to Operations



	FY 2022/23	FY2021/22
Employee costs	\$5,577,240	\$4,754,941
Programs direct expenses	\$2,057,237	\$1,278,868
Information technology	\$234,746	\$411,213
Depreciation	\$194,489	\$25,546
Other	\$884,804	\$270,127
TOTAL	\$8,948,517	\$6,740,695



# Financial report

## Expenditure overview

Consolidated Statement of Comprehensive Income For the year ended 30 June 2023

	2023 \$	2022 \$
Revenues from Operations	9,303,105	6,633,886
Expenditure relation to operations	8,948,517	6,740,695
Surplus/(Deficit) from operations	354,588	(106,809)

Consolidated Statement of Comprehensive Income For the year ended 30 June 2023

	2023 \$	2022 \$
Current Asset	3,781,606	3,629,912
Non Current Assets	1,302,811	1,298,624
Total Assets	5,084,417	4,928,536
Current Liabilities	1,137,650	1,336,358
Retained earnings	3,946,767	3,592,179
Total Liabilities	5,084,417	4,928,536

Covid -19 reimbursement grant and the income derived from previously under utilized grants have contributed to a positive financial position in FY 2022.23

*Kevin Parry*  
Treasurer

## Funding partners

Department of Health WA  
Department of Health and Ageing  
Department Social Services  
Department of Veterans Affairs  
Armadale City Council  
Serpentine Jarrahdale Shire

Gosnells City Council  
Canning Council  
Lotterywest (State Lotteries WA)  
National Disability Services  
Disability Service Commision  
My Aged Care







# halo

CARE & SUPPORT







# halo

CARE & SUPPORT

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