

Presbyterian Support Otago

Annual Report

2020

*People
helping
People*

*for over
100 years*



Presbyterian Support
Otago

enliven
PRESBYTERIAN SUPPORT OTAGO

 Family
Works

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Mission Statement

Our Vision

Presbyterian Support Otago works for a fair, just and caring community.

Kaihapai Perehipitiriana o Otagou i mahi ai mo te tika me te hapori e manaaki ana.

Our Values

In meeting our Mission, we will endeavour to act with Faith, Compassion, Respect, Integrity, Courage and Independence.

I te kua oti ai aua moemoea, kia haere tonu kei raro i tewhakapono, te atawhaitanga, te maruwehe, te ngakau tapatahi, te hautoa me te mana motuhake.

Our Mission

Motivated by our Christian heritage, and in partnership with others, we work across the generations for positive change, strong families and healthy communities.

Mai i aua whakapono a te karaitianatanga me aua rangapu o o ratou, kia mahi tahi ai i te tahataha o nga reanga katoa hei whakaumu pai, hei whakapakari ai te whanau nga hapori hoki.

Strategic Plan 2017 - 2022



Chairman's Report

As I write this report, I have just listened to the 1pm COVID-19 update on National Radio. For most of us this has become a daily exercise as we learn to live in a completely different world.

For PSO it has been another year of change. Late in 2019 we said farewell to Paul Hooper who had been the Director of Family Works for 14 years and welcomed Carmen Bachelor into this role. We have also recently made a key appointment with Karen Philip taking on the role of Human Resources Manager, strengthening the HR team as they manage the administration and needs of over 800 employees.

The Board has also said farewell to retiring Board Members Bernie Lepper after 5 years' of service and Phillip Broughton after 3 years. Thank you, Bernie and Phillip for your important contributions over this time.

The impact of COVID-19 on the activities of PSO during the period covered by this annual report has been significant and has proved a huge challenge to this organisation.

Since the beginning of the COVID-19 outbreak in March 2020, protecting older people in our care homes, hospitals and villages has been a key focus for PSO and we continue to follow clinical best practice as well as Ministry of Health and Aged Care Association guidelines. The commitment and effort of our Enliven staff has been fantastic during the nationwide lockdown and this continues as we face the constant threat of community transmission. Thank you to all our staff who have contributed to the care of our most vulnerable.

I also wish to acknowledge our Family Works staff who have continued to provide invaluable support especially via the food bank and financial capability services, to individuals and families facing COVID-19 related pressures. We are only just beginning to see the pandemic's longer-term economic and psychological effects and Family Works is well placed to identify and meet the resulting need across our communities.

At a time when PSO has been providing support, we have also very gratefully received two notable gifts. The first was a significant donation from a supporter of our work within the community, and the second was a \$700,000



legacy from an estate. We are incredibly grateful for the generosity embodied in these gifts. It is gifts like these that encourage and enable PSO to deliver services and make investments beyond that funded within our normal budgets.

To enhance PSO's financial sustainability and to meet unmet housing need, the Board has adopted a strategy of expanding its retirement villages. During the year, strategic land purchases have been made alongside our retirement villages in Wanaka and in Alexandra. Work is underway with concepts for this development. The Board has also made available undeveloped land to the Just Housing Trust as they consider how best to meet the needs of those requiring homes in Dunedin.

A significant focus for myself and the Board this year are the governance principles of compliance, accountability and delivering strategy. The Board's role and responsibility is to ensure that these principles are clearly articulated for management and staff, as they underpin the organisation's culture.

In this regard the Board has established and approved new governance policies that establish clear guidelines for Human Resource management and Health and Safety. We are also currently reviewing Risk Management and Compliance policies. We will continue to review policies that strengthen governance and support the organisation and its management.

The Not for Profit sector has undergone significant changes over the years with professionalism, complexity around funding and compliance with legislative developments placing an increased emphasis on strong and progressive

professional governance. The increased workload and professionalism required from the Board is now beyond what might be reasonably expected from volunteer Board Members.

PSO, over the years, has grown in size and complexity and it is now one of the largest employers in Otago with an annual turnover of around \$35m with significant investment in rest homes, hospitals and retirement villages. Alongside this, the responsibilities, commitment, and on-time performance of duties for Board Members has increased. Currently the work of the Board is not recognised by PSO as an in-kind donation.

A new model for the Board would allow a mix of voluntary service and professional governance. Accordingly, at the AGM the Board will be proposing changes to the constitution that will establish a minimum number of Board members, while maintaining the existing proportions of Presbytery representatives. It will be further proposed that Board Members can be remunerated, if they choose. The proposed changes to the constitution will facilitate effective governance and will attract and secure high-performing future Boards.

PSO is a fully independent organisation which, like

the other regional Presbyterian Support entities, has an affiliation with Presbyterian Support New Zealand (PSNZ). During the year Jo and I have attended several workshops held in Wellington to examine how as a nationwide organisation PSNZ can be more effective as an influencer and service provider nationally. The strategy that is developing is based around a stronger national office that may take a larger role across marketing, communications, fundraising and act as a resource and support for regional Boards. This is a work in progress but could become a means of addressing duplications that currently exist around the regions.

Finally, I would like to acknowledge the commitment and hard work of all the staff of PSO and also the leadership of Jo Rowe, our CEO. It has been a pleasure meeting with Jo on a weekly basis as we develop the essential working relationship between the Board Chair and the CEO; a relationship that is required to deliver the strategy and establish a culture that is based on the Christian values that founded Presbyterian Support Otago 114 years ago.

Tim Mepham
Board Chair

All Masked Up

Left to right: Ray MacLeod, Stephanie Pettigrew, Rev. Kerry Enright, Tim Mepham (Chairman), Jessica Palmer, Frazer Barton, Helen Scott, Lindsay Alderton (Inset Bev Rodwell)

The Board



Chief Executive's Report



Tēnā koutou katoa,

This is my first CEO report for Presbyterian Support Otago, having been appointed in September 2019. Firstly, I would like to thank all the staff at PSO who have made me feel so welcome and who are committed to the PSO values; your heart for our organisation is palpable. Since my tenure began, a great deal of focus has been on creating a clear vision for the future which aligns with the strategic plan and mission of PSO.

Getting to know the Senior Leadership Team, their strengths and capabilities, as well as their hopes and dreams for the organisation has been an important part of creating the vision.

Carmen Batchelor was appointed in January 2020 as the Family Works Director, bringing with her a passion and enthusiasm for our community nurtured through years of working for the Ministry of Social Development, and involvement in community groups. Seeing our Family Works Team develop and strengthen under her leadership has been wonderful. An example has been the recent signing of a Memorandum of Understanding between PSO and the Tangata Moana committee to deliver the Talanoa Ako cultural education program, showing a clear commitment to cultural partnership in meeting the needs of our community.

Our organisation's journey to greater cultural awareness is being led by Ngā Tikanga Whanaungatanga Whakahiko E Rōpū ("Cultures as a whānau on a never ending journey group"). Known more colloquially as Te Rōpū, this group and our commitment to the creation of a kete (resource) inform our approach as program deliverers and community champions. I am very grateful

to all the members of the Rōpū who commit their time to advancing our understanding and appreciation of bi-cultural and multi-cultural practices and how to provide a culturally safe environment. This is important as we have employees from over 30 different cultures around the world providing professional and heartfelt care across our facilities, as well as an increasingly diverse client base.

As Enliven Services Director, Maurice Burrowes has supported and strengthened his team through what has been an unprecedented period with the emergence and progression of the COVID-19 pandemic. There have been many trying times with management of staff 'bubbles', care home lockdowns and anxious families and residents, all of which has been weathered by Maurice and his team with remarkable leadership and resilience. Excellent communication has been crucial to the success of our pandemic management, and the appointment of Sally Knox to the Communications Advisor position just weeks prior to lockdown was miraculous. Communications and IT capability provided an environment for PSO to thrive through extremely trying times.

Technology is such an important part of everyday life now, and our ICT program of work that commenced over 2 years ago with the identification of significant IT issues has evolved dramatically. ICT Director Sandy Shea has developed a highly knowledgeable team who have ensured the flow of information between our people, teams and facilities is increasingly efficient, thereby strengthening our ability to achieve future development and growth.

Finance is a fundamental element of any business, but one which is often unappreciated. Alongside the CEO's

vision, Andrew Borthwick, Finance Director for PSO, continues to respond and adapt with a highly skilled corporate, accounting and payroll team who often work under great pressure and weighty expectations. As part of the vision to strengthen the organisation, and to ensure we meet the increasingly complex needs of our operational arms, our Corporate Services division is currently being reviewed. The resulting renewed structures and processes will enable us to be agile, respond effectively and preempt future community needs. I am very grateful for the commitment the Corporate Services and Finance Team have shown to the review project which is foundational to achievement of the vision.

The vision for PSO's future is one of strengthening our foundation (Corporate Services), fortifying our PSO home (delivering responsive and agile services in line

with our core business capabilities and community needs), and growing our garden of sustainability (consolidating future revenue through expanding our investment in retirement village opportunities). All of this aligns with our purposeful intention to serve others, develop our people, and provide security to the most vulnerable in our communities.

To all our funders, donors, volunteers, workers and supporters, thank you! Without you we could not do what we do.

I am grateful for all who are on this journey with us.

Nāku iti noa, nā

Jo Rowe

CEO Presbyterian Support Otago

Senior Leadership Team

Left to right: Andrew Borthwick (Finance Director), Sandy Shea (ICT Director), Jo Rowe (CEO), Carmen Batchelor (Family Works Director) and Maurice Burrowes (Enliven Director)



Family Works

Kia Ora Koutou, Talofa Lava, Kia Orana, Malo e lelei, Warmest Pacific Greetings.

The Unprecedented Impact of COVID 19

The impact of COVID-19 on our current clients, tamariki, rangatahi and whānau created further financial hardship and distress. This led to an increase in demand for food, power and heating fund assistance, financial mentoring and our group programmes. Family Works across the region experienced an increase in new referrals from those who either lost their jobs or who had their hours significantly reduced due to the pandemic.

Our staff continued to provide urgent food assistance, social work support, financial mentoring and micro-financing loans via phone or on-line via Zoom during the COVID-19 lockdown.

A COVID-19 Pulse Survey undertaken in July 2020 and

conducted with Oranga Tamariki and MSD service providers found that providers were most concerned about social or physical isolation and mental health issues for tamariki and rangatahi. The survey also found that financial difficulties were the main issue identified for families/whānau, with family or parenting stress also being highlighted as an issue.

Building and Growing our Financial Capability Services

Family Works continues to grow its provision of wrap-around financially inclusive support services. Our staff see the daily impact of clients becoming trapped with high interest debt, including having no options but to access and be exploited by 'predatory' lenders. This can lead to increased distress, further poverty and we see this reflected in the increase in food bank requests due to

How we helped



Food parcels supplied **2,922**

4,791 Family Works clients



253

Children who participated in Family Works programmes



The Buddy programme is an excellent initiative, both for the Big Buddy and for the Little Buddy. My partner Andy and I became involved as we could see the benefits - new experiences and opportunities for all parties.

Past volunteer, Mylrea Bell, speaking about the Buddy Programme.

unmanageable debts and rising living costs such as rent, power, phone and internet.

We have long provided general 'budgeting advice' but more recently we are using the term 'Building Financial Capability' to capture the range of specific and tailored services we offer to empower people in managing their finances and reaching their goals. These services include:

- One to one Financial Mentoring (setting financial goals and putting a financial plan of action in place)
- Money Mates Groups (small groups having safe conversations around money)
- Access to interest free loans to repay existing debt via our Financial Mentors
- "Good Loans" - Low and No Interest Loans made in partnership with Good Shepherd and BNZ. These are safe and affordable loans and are often used to buy a second-hand car, household items or for education related expenses. Microfinance offers another option for people on limited incomes, adverse credit history or who may not fit tier one lender criteria. This provides clients with a fairer, safer and more affordable option and aligns with the PSO vision of a fair, just and caring community
- Accessing the Dunedin City Council Electricity Fund (clients needing help with a power bill)

- Accessing the Central Lakes Heating Trust Fund (clients needing help with power and/or heating costs, includes wood, coal and diesel)
- ERANZ in-home energy coaching. We continue to see our clients struggling to pay their power bills and keep their homes warm, so we were delighted to partner with ERANZ (Energy Retailers Association New Zealand) in March 2020. Families receive an in-home energy coaching visit to assist them to understand their plans and payment options, create an energy-efficient action plan to reduce non-essential power usage and connect with services such as budgeting/financial mentoring support as well as other home energy support services e.g. Healthy Homes Initiatives. Families are also provided with free energy efficient lightbulbs for participating in the programme

We are active members of the Whangaia Nga Pa Harakeke (WNPH) Thriving Children, Strong Families, Resilient Communities – Rōpū Manawhakahaere / Governance Group which provides sector governance and leadership in the Southern Region to support the strategic goal of reducing family harm.

WNPH is a collaborative approach and is designed at a local level with Iwi, the community and partner agencies.

This approach encourages innovation, leading to tailored responses based on community needs.

Agencies and providers work together to help families who have reported a family harm episode to police.

It is a privilege as Family Works Director to represent both PSO and the NGO Sector as part of WNP. Our Social Work Practice Manager is also a member of the WNP Operations Group. As well, we have two Social Workers working with other agencies in responding to individuals and families affected by family harm.

During Alert Level 3 and 4 and continuing today, we provide regular food parcels to the WNP based at the South Dunedin Police Station. These food parcels are delivered by Police or Family Harm Team community agency partners to families impacted by family harm.

Strengthening Pasifika Engagement

Following on from the successful delivery of Pacific PowerUp FlexiPlus in 2019 we recently signed a Memorandum of Understanding with Dunedin Tangata Moana Committee to deliver Talanoa Ako. To date, delivery of this programme has been impacted by COVID-19 but is on track for the latter half of 2020.

Talanoa Ako aims to equip and empower Pacific parents, families and their communities with the skills, knowledge and confidence to champion their children's education.

This programme is delivered through a series of educational workshops delivered over 10 weeks.

Talanoa Ako is part of the Pacific Parent Responsiveness Programme and is a core component of implementing the Pacific Education Action Plan. Parents, their families and their children have access to a full teaching team of registered teachers, academic mentors and community champions.

There are 4 cohorts covered: Early Childhood (ECE), Primary/Intermediate, Secondary and Parents/Caregivers.

The objectives are to accelerate participation in early learning and lift achievement in primary and secondary education by building the capability, knowledge and voice of Pacific parents, families and communities to accelerate and drive Pacific educational success.

Koloa'o o Tonga Programme (Treasures of Tonga)

Family Works are proud to partner with MSD Pasifika Proud and Fusifonua Partners (made up of young NZ born Tongan women leaders) to provide workshops to enable NZ-born Tongans to better understand Tongan identity and concepts and to provide insight and awareness about the island-born way of thinking. This involves comparing and contrasting the two worlds, identifying communication gaps and strengthening understanding so Tongan youth can communicate better with their



Strengthening Pasifika Engagement Presbyterian Support Otago (PSO) staff with the Tangata Moana Committee

Left to right: Rev. Alofa Lale, Jo Rowe (CEO for PSO), Satele Faa'toese, Janice Tofia, Kathryn Tofia, Michelle Schaaf, Pule Tofia, Carmen Batchelor (Director of PSO Family Works), Lili Faa'toese, Pip Laufiso, Pania Tulia (Family Works PSO)

parents and move forward to build strong and vibrant Tongan families (fāмили kaukaua mo kaukauola). The Fofola e fala kae Talanoa e kāinga framework is the underlying method used to facilitate each workshop.

Group Programmes (Growing Taller, Incredible Years, Harakeke)

Demand for our Group Programmes remains high across our region with a noticeable increase in requests from parents and other agencies during Alert Level 1 and 2. Apart from the Incredible Years (IY) Programme which is funded by the Ministry of Education, none of our Group Programmes receive direct government funding and therefore rely on the generosity of donors, grants and PSO's internal funding.

We continue to receive fantastic feedback from parents in terms of the difference these programmes make to their parenting and confidence.

Family Works Foodbank

Our Dunedin based foodbank is well known in the community and we are very grateful for the generous donations of money and goods received during this challenging year. We also partner with regional foodbanks to provide parcels in Central Otago and other locations across the Otago region. Our foodbank is often the first point of contact with us for our clients, and it is an opportunity for us to let them know about our other programmes that may empower them to strengthen their families and help them to reach their goals.

*He aha te mea nui o te ao?
Hei Tangata, Hei Tangata, Hei Tangata
What is the most important thing in the world?
It is people, it is people, it is people.*

91%
of clients say our services were accessible

83%
of clients say they felt better prepared for the future

81%
of clients say they met their goals

94%
of clients were satisfied with their relationship with their worker

86%
of clients say they learnt useful new skills/strategies

75%
of clients report improved relationships

Constable Charlotte Davies (Police Family Harm Team) sent us an email to say: "I just wanted to say a huge thank you for the amazing food parcels that were available for us to collect on Friday. We also received several boxes of dried goods from Kiwi Harvest so we can make up additional parcels if necessary. Thank you for your continued support, Charlotte"

Whangaia Nga Pa Harakeke (WNP)



Enliven Services

ENLIVEN – A VERY CHALLENGING YEAR

Early 2020 saw the spread of COVID-19 to New Zealand. In response to this and in the face of the increased risk, we introduced restricted visiting to our Enliven Care Homes on March 16. Then on March 23, we placed our homes into strict lockdown. The whole country went into lockdown two days later.

This lockdown period was a difficult time for residents, many of whom were very frightened of catching the virus, especially in light of the high number of older people dying from the virus overseas. Staff bore an enormous sense of responsibility for the safety of the residents and their own families. Some of our staff were vulnerable themselves, being over 70 years of age or immune-compromised, and thus needed to stay home to stay safe. For some of our homes, this meant as much as a 25% reduction in available workforce. Our volunteers were also advised to stay at home, to keep themselves and our residents and staff safe. Staff who were able to work safely, were required to work in different ways and a lot of time went into establishing tight work 'bubbles' within each home to reduce risk of internal transmission.

We all breathed a sigh of relief when we finally moved to Alert Level 1 and things could almost get back to normal, although measures such as visitors signing in and heightened hygiene practices still applied. The fact

that our homes were able to successfully get through the lockdown and the months since then, is due to the outstanding work of our staff and strong support from residents and their families, and we are very thankful to them all. At the time of writing we are back at Alert Level 2, and we will continue to navigate the pandemic with the safety and wellbeing of residents, families and staff as our highest priority.

Enliven Overview

In addition to the 755 older people who were in our Enliven Care Homes during 2019-2020 we supported just over 180 older people through Enliven community-based services. Club Enliven is the largest of these services and continues to run to capacity in Dunedin and Alexandra. We also continue to provide Visiting Volunteers in Dunedin, and Home Share in Alexandra as well as Individualised Funding services across Otago. In addition to these services we provide a full food service to Oamaru Hospital and food and laundry services for Clutha Health First in Balclutha. Under our Enliven Service we also hold contracts to provide Meals on Wheels in Oamaru, Mosgiel, Balclutha and Wanaka. This is an important service that supports older people to remain living at home and within their local communities.

Right: Visiting Volunteer Aaven with Natalie.

Natalie and I are coffee snobs with sweet tooth's and enjoy trying the great cafes of Dunedin. We both love intellectual and philosophical pursuits so we often frequent the museums, art galleries, and the public library to spark discussions. Natalie and I have transcended the volunteer relationship and have begun a wonderful friendship. We are grateful that Enliven Presbyterian Otago has brought us together. This is a picture of us at one of our favourite places, Nova in the Octagon.



Enliven Residential

Our eight Enliven Care Homes continue to maintain high occupancy levels, averaging an impressive occupancy rate in excess of 96%. This compares favourably with the wider sector national occupancy rate of just 87%. These occupancy rates reflect the quality of our staff in addition to the valuable contribution that volunteers make to our service.

One of the highlights this year was the completion of the stage 2 development at Aspiring Enliven in Wanaka which included 12 new bedrooms opening in December 2019. The increase in capacity was well received by the local community.

We also operate Wanaka Retirement Village which offers independent living in modern, well-appointed self-contained apartments and townhouses.

Enliven Community

In August 2019, Club Enliven in Dunedin moved from a small lounge at Ross Home, which had served them well for the past 25 years, to a more spacious setting of the First Church former Manse. Since the move, we have

been able to offer Club members a much wider range of activities as well as being able to make good use of the outdoor space. The Club now has a nine-seater van, which has enhanced our ability to take Club members out and about and to participate in community events.

The Future

Enliven will continue to provide the highest quality care across all its services and aims to remain an employer of choice for staff in this sector. We are also looking to expand our retirement village offerings in Wanaka, Alexandra and Dunedin, which will provide more choice for older people across our region.

What stands out most for me when I reflect back over the past 12 months is the dedication and commitment of our hard working Managers and the resilience and resourcefulness of our staff, and this stands us in good stead for the challenges to come.

Maurice Burrowes

Director, Enliven Services

83%

of residents agree "This support service has made a positive difference to my life".

How we helped



755
Residents of our care homes



1,782
Older people participated in community-based activities



52,057
Meals on wheels delivered

ICT - Future Proofing

PSO's Information Communications and Technology (ICT) department supports approximately 300 PSO staff which will increase to 730 as PSO continues to migrate to a new cloud platform in 2020. This is part of a 2.5 year program of work to establish a platform that supports a modern workplace which is business centric, empowers staff, connects people, and encourages innovation.

In 2019/20 significant progress has been made delivering this program of work. These achievements are a testament to the commitment and talent of the ICT Team and our technology provider Computer Concepts Ltd (CCL) who have worked in partnership with PSO to make this possible.

In July 2019, an upgrade to our data network was commenced. This network connects all PSO's 21 locations and provides access to staff working on those sites to internet services and PSO systems operating from the CCL Data Centre. Delays to the rollout of Chorus ultra-fast fibre broadband network in some regions caused some frustrations but the network project was completed on 29 June 2020.

In November 2019, the server platforms that house PSO's software applications and systems were successfully moved to the CCL Data Centre. The significance of this achievement is the management, oversight and technology-redundancy offered through the Data Centre, providing surety that the network and core business systems are monitored 24/7.

In March 2020 planning was completed for the rollout of cloud-based email in parallel with the upgrade to PC Desktops. This was a key milestone as it was the

first stage for migration of business systems from traditional 'on-premises server-based' platforms, to cloud technology. It also signalled standardisation of PSO's technology to a Microsoft platform away from an historical mix of solutions that made integration of systems difficult.

Whilst Covid-19 delayed the Stage 1 rollout of Microsoft 365, an alternative plan to maximise staff's ability to work from home was successful. Through nimble and adaptive thinking the ICT team was able to provide equipment at home, new solutions, training and learning material – all of which enabled most staff that could work at home, to do so. The video conferencing solution "Zoom" was championed as a viable and popular means for communication and remains a favourite for distance communications currently.

The learning gained from lockdown provided immense value as the ICT team revisited the planning for the cloud-based email rollout, scheduled for mid-August 2020.

In closing I want to acknowledge the ICT Team – Scott Mosley, Nic Mair, Simon James and Alex Tatu, who were supported by Jo Sime from Enliven. They have all been professional, determined, hardworking, helpful and gracious. The next 12 months will see PSO emerge as a fully digitised and integrated workplace and the team is well placed to lead the organisation into that exciting future.

Sandy Shea
ICT Director

Left to right: Jo Sime, Scott Mosley, Sandy Shea, Alex Tatu, Nic Mair and Simon James.



The Year in People



1,517 Donors



812 Employees



550 Volunteers



13,046 People we helped through Family Works

The Year in Dollars



\$41,126,000
Income



\$1,925,000
Donations, grants
& bequests



\$41,654,000
Expenditure



\$528,000
Net deficit

Our Supporters *Thank you!*

Our mission at Presbyterian Support Otago is to work across the generations for positive change, strong families and healthy communities, motivated by our Christian heritage and in partnership with others, to assist those in need.

We simply could not do this without the generous financial support and goodwill we receive from many incredible individuals and organisations. We are very grateful to you all.

Sadly, we needed to postpone one of our annual major planned fundraising events - The Taieri Gorge Rail Walk - due to the pandemic.

On a brighter note, we held Octacan a little later this year and were rewarded with a day of bright sunshine!

Through Octacan we received over fifteen thousand cans and \$3500 in financial donations.

We extend our heartfelt thanks to our amazing volunteers, donors and supporters who made this event such a success.

Generous grants from philanthropic trusts continue to be received, and these contribute greatly to the provision of vital services across Otago by Family Works and Enliven.

Your support is critical to our success. Thank you.

Jude McCracken
Supporter Development Manager



OCTACAN July 2020

Total cans donated: 15,713
Total money donated: \$3,507

Filling our Food Bank (Emergency Food Appeal) - April / May 2020

\$96,174	Total money donated
457	Donors
1,413	Clients needing immediate assistance and access to foodbank
788	Food Parcels Distributed



How you helped



550
Volunteers across our organisation

\$367,000
Received from grants for programmes and services

2,735
Individual donations received.

123,349
Gift in kind items were donated

30,000
Customers were served in our retail charity stores

\$1,558,000
Financial donations & bequests received



Photo courtesy of Tama Samuels

Financial Statements

Presbyterian Support Otago Incorporated Summary Consolidated Statement of Comprehensive Revenue and Expense

For the Year ended 30 June 2020

	Group 2020 \$000's	Group 2019 \$000's
Income		
Income from services	36,261	34,093
Sale of Goods	1,248	1,159
Donations, Grants and Bequests	1,925	855
Other income	1,692	1,340
Total Income	41,126	37,447
Expenditure		
Employment related	28,443	26,328
General operating	6,666	6,541
Office & Administration	3,104	2,605
Other expenditure	1,633	1,554
Finance Costs	58	83
Total Expenditure	39,904	37,111
Operating Surplus before increase in ORA expense	1,222	336
Increase in ORA Expense	1,263	-
Net Operating Surplus / (Deficit) for year	(41)	336
Share of net surplus / (deficit) Joint Venture	(487)	3
Net Surplus / (Deficit) for the Year	(528)	339
Other Comprehensive Revenue and Expense		
Gain on revaluation of Operating Property	8,834	-
Total Comprehensive Revenue and Expense	8,306	339

Summary Consolidated Statement of Changes in Net Assets / Equity

For the Year ended 30 June 2020


	Group 2020 \$000's	Group 2019 \$000's
Opening Balance of Equity	47,747	47,408
Plus:		
Total Comprehensive Income	8,306	339
Closing Balance of Equity	56,053	47,747


Summary Consolidated Statement of Financial Position

As at 30 June 2020

	Group 2020 \$000's	Group 2019 \$000's
Equity	56,053	47,747
Represented by:		
Current Assets	7,053	6,134
Non-Current Assets	71,864	60,866
	78,917	67,000
Current Liabilities	21,201	19,253
Non-Current Liabilities	1,663	-
	22,864	19,253
Net Assets	56,053	47,747

Signed for and on behalf of the Board as at 23rd September 2020:


Mr Timothy Mepham
Chairman


Mrs Stephanie Pettigrew
Deputy Chair



Financial Statements

Presbyterian Support Otago Incorporated Summary Consolidated Statement of Cash flows

For the Year ended 30 June 2020

	Group 2020 \$000's	Group 2019 \$000's
Net Cash flows from Operating Activities	2,538	1,797
Net Cash flows to Investing Activities	(3,072)	(405)
Net Cash flows to Financing Activities	1,370	(1,441)
Net Cash Flow	836	(49)
Opening Balance at 1 July	1,914	1,963
Closing Balance at 30 June	2,750	1,914

Notes to the Summary Consolidated Financial Statements

For the Year ended 30 June 2020

These are the summary financial statements of Presbyterian Support Otago Incorporated group for the year ended 30 June 2020.

The specific disclosures included in these summary financial statements have been extracted from the full annual financial statements authorised for issue by the Board on 23 September 2020. The full annual financial statements have been prepared in accordance with Generally Accepted Accounting Practice in New Zealand (NZ GAAP) and they comply with the Public Benefit Entity (PBE) Accounting Standards applicable to not for profit entities.

This summary financial report does not include all the disclosures provided in the full financial statements and cannot be expected to provide as complete an understanding as provided by the full financial statements.

An unmodified audit opinion dated 23 September 2020 has been received on the full financial statements for the year ended 30 June 2020. A copy of the full financial statements for Presbyterian Support Otago Incorporated for the year ended 30 June 2020 may be obtained by contacting Presbyterian Support Otago on (03) 477-7115 or by writing to PO Box 374, Dunedin.

These summary Financial Statements have been examined by our auditors for consistency with the full financial statements. These Summary Financial Statements were approved for issue by the Board of Presbyterian Support Otago Incorporated on 23 September 2020.

Basis of Preparation

Presbyterian Support Otago Incorporated is a public benefit entity and was registered on 12 October 1907 under the provisions of "The Religious, Charitable and Educational Trust Board Incorporated Act 1884" (now the "Charitable Trusts Act 1957").

These summary financial statements of Presbyterian Support Otago Incorporated have been prepared in accordance with PBE FRS 43: Summary Financial Statements. The presentation currency is New Zealand dollars, rounded to the nearest whole thousands (\$000's).

Impact of COVID-19

On 11 March 2020, the World Health Organisation declared a global pandemic as a result of the outbreak and spread of COVID-19. On 25 March 2020, New Zealand went into a Level 4 lockdown status requiring all non-essential businesses whose employees could not work from home to close for a four week period (extended by a further 5 days to 27 April 2020). The Group's core operations (aged care - rest homes and retirement villages) were deemed essential services and, as a result, the Group was able to operate in a reduced capacity with no material impact on the balances or disclosures in the financial statements, except for a greater degree of uncertainty attached to the valuation of the Group's properties, as described in Notes 9 and Note 12 of the full financial statements. Management and the Board have considered the impact of Covid-19 on relevant balances and disclosures in the financial statements and have a reasonable expectation that the Group will continue operating on a financially sustainable basis for the next 12 months. For this reason the financial statements have been prepared on a going concern basis, consistent with the prior period.

Specific Accounting Policies

All specific accounting policies have been applied on the same basis as those used in the full financial statements of Presbyterian Support Otago Incorporated.



PWC Auditor's Letter



Report of the independent auditor on the summary financial statements

To the Trustees of Presbyterian Support Otago Incorporated

The summary consolidated financial statements comprise:

- the summary consolidated statement of financial position as at 30 June 2020;
- the summary consolidated statement of comprehensive revenue and expense for the year then ended;
- the summary consolidated statement of changes in net assets/equity for the year then ended;
- the summary consolidated statement of cash flows for the year then ended; and
- notes to the summary consolidated financial statements.

Our opinion

The summary financial statements are derived from the audited consolidated financial statements of Presbyterian Support Otago Incorporated ("the Charitable Trust"), including its subsidiary (the Group) for the year ended 30 June 2020.

In our opinion, the accompanying summary consolidated financial statements are consistent, in all material respects, with the audited consolidated financial statements, in accordance with PBE FRS-43: *Summary Financial Statements* issued by the New Zealand Accounting Standards Board.

Summary Consolidated financial statements

The consolidated summary financial statements do not contain all the disclosures required by Public Benefit Entity Standards (PBE Standards). Reading the summary consolidated financial statements and the auditor's report thereon, therefore, is not a substitute for reading the audited consolidated financial statements and the auditor's report thereon. The summary consolidated financial statements and the audited consolidated financial statements do not reflect the effects of events that occurred subsequent to the date of our report on the audited consolidated financial statements.

The audited consolidated financial statements and our report thereon

We expressed an unmodified audit opinion on the audited consolidated financial statements in our report dated 23 September 2020.

That report also contains an emphasis of matter paragraph, drawing attention to the material valuation uncertainty attached to the valuation of the Group's residential facilities and retirement village land and buildings.

Information other than the summary consolidated financial statements and auditor's report

The Trustees are responsible for the annual report. Our opinion on the summary consolidated financial statements does not cover the other information included in the annual report and we do not express any form of assurance conclusion on the other information.

In connection with our audit of the consolidated summary financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the summary consolidated financial statements, or otherwise appears to be materially misstated. If, based on the work we have performed on the other information, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Responsibilities of the Trustees for the consolidated summary financial statements

The Trustees are responsible, on behalf of the Charitable Trust, for the preparation of the consolidated summary financial statements in accordance with PBE FRS-43: *Summary Financial Statements*.

Auditor's responsibility

Our responsibility is to express an opinion on whether the summary consolidated financial statements are consistent, in all material respects, with the audited consolidated financial statements based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) 810 (Revised), *Engagements to Report on Summary Financial Statements*.

We are independent of the Group. Our firm carries out other services for the Group in the areas of compliance advice as well as providing Trust Deed Compliance services in the form of a separate Deed of Supervision report. The provision of these other services has not impaired our independence as auditor of the Group.

Who we report to

This report is made solely to the Trustees, as a body. Our audit work has been undertaken so that we might state those matters which we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charitable Trust and the Trustees, as a body, for our audit work, for this report or for the opinions we have formed.

Chartered Accountants
23 September 2020

Dunedin

PricewaterhouseCoopers, Level 1 Westpac Bldg, 106 George St, PO Box 5848, Dunedin 9058, New Zealand
T: +64 3 470 36000, F: +64 3 470 3601, pwc.co.nz

Acknowledgements

Thank you!

We gratefully acknowledge the support of the entire Otago community. Bequests, grants, gifts and donations are an important part of our income and make it possible for us to carry out our Mission each year. We simply couldn't do what we do without the generosity of you all. We thank each and every one of you who has supported us, who share our values and our commitment to making a difference.

We received significant support from the following organisations and trusts during this financial year.

Grants

Callis Charitable Trust
Central Lakes Trust
Clutha Foundation
Department of Internal Affairs
Donald & Nellye Malcolm Trust
Dunedin City Council
Estate of JDS Roberts
J N Lemon Charitable Trust
Kingston Sedgfield (NZ)
Charitable Trust
Mercy Hospital Dunedin Limited
Nellie Milnes Charitable Trust
Network Waitaki
Otago Community Trust
Patricia France Charitable Trust
Ross Memorial Fund
The Campbell Charitable Trust
The Lion Foundation
The Presbyterian Church
Property Trustees
The Timothy Blair Trust
The Tindall Foundation
The Trusts Community
Foundation Ltd
William Downie Stewart
Charitable Trust

Gifts-in-kind

Abbotsford School
ABC Business Sales
Absolute Free Range Eggs
ACC – Social Club
Agreeable Nature
Alsco NZ Dunedin
AMI
Anderson Lloyd
Anzco Green Island Ltd
Arana College
Ariki Running Club
ARISE Church Dunedin
Arjo Huntleigh
Arthur Street School
Aukaha
Aurora Energy
B@tCH
Balmacewan Intermediate
School
Beacon Group
Beca
Better Moves
Blueskin Garden Club
BP Dunedin North
BP Mornington
Café Mokha
Campbell's Butchery
Cedars of Lebanon Club Inc
Church of Christ
Coastal Unity Parish
Columba College
Computer Concepts Limited
Couplands Andersons Bay
Couplands Kaikorai Valley
CrestClean
Cumberland College
Danish Delights
Darling's Fruit Orchard
Department of Corrections
Dunedin City Council
Dunedin Hospital
Dunedin Public Library
Dunedin Railways
Dunedin South Presbyterian
Church
East Coast Holdings Limited
Ebos
Education Perfect
ENZA Dunedin
Firebrand
First Church
Fisher & Paykel
Flagstaff Community Church
Fonterra New Zealand Limited
Foodstuffs Dunedin Distribution
Centre
Frances Hodgkins Retirement
Village
Fresh Choice Green Island
FreshChoice Roslyn
Gilmour Motors
Goodman Fielder NZ Ltd
Grant's Braes School
Harraway and Sons Limited
Hayward College
High Performance Sport
Highgate Presbyterian Parish
Honey by Wrights
Housing New Zealand
Inland Revenue – Social Club
Inner Wheel Club of Dunedin
South
John's Furniture Warehouse
Kaan's Catering Supplies Limited
Kaikorai Presbyterian Church
Kaikorai Valley College
King's High School
Kingsgate Hotel Dunedin
KiwiHarvest
Knox Church, Dunedin
Knox College

Kordia
Kowhai Bush Farms
Lions Club of Dunedin South
Charitable Trust
Manuka Doctor
Maori Hill School
Marinoto Clinic
Marks & Worth
McDonald's Dunedin
MediaWorks
Mercy Hospital
Ministry of Social Development
Mornington Presbyterian Church
Mornington School
Musselburgh School
Nando's Dunedin
Nations Church
New World - Centre City
North Dunedin Pacific Island
Presbyterian Church
North East Valley Normal School
Norwood Distributors Ltd
NZCU South
NZI
NZNO
One Agency
Opoho Presbyterian Church
Ospri
Otago Boys' High School
Otago Cleaning Supplies
Otago Corrections Facility
Otago Daily Times
Otago Girls' High School
Otago Highlanders
Otago Peninsula Presbyterian
Parish
Otago Polytechnic Student
Village
Otago Polytechnic Te Punaka
Owheo
Otago Regional Council
Otago University
Pacific Radiology Otago
PEI Limited
PGG Wrightson
Pizza Hut
PKF Bredin McCormack
Rewcastle
Pleasant River Produce
Port Chalmers Four Square
Port Chalmers New World
Port Chalmers School
Potpourri Vegetarian Café
Public Health Service
Rabobank

reThink Children's Therapy
Ricoh New Zealand Limited
Ritchies Transport Dunedin
Robertson's Meats
Roofing Solutions Dunedin
Roslyn Baptist Church
Rotary Club of Dunedin Central
Rotary Park Kindergarten
Salmond College
Scott Technology
Selwyn College
Southern District Health Board
Southern Receivables
SPCA Dunedin
St Clair School
St David's Presbyterian Parish
N.E.V.
St Paul's Presbyterian Church
St Philips Church Grants Braes
St Stephen's Leith Valley Parish
Stonelake Trust
Tahuna Normal Intermediate
School
Taieri College
The Athlete's Foot
The Perc
The Warehouse Dunedin
Trents Wholesale Limited
Unichem Centre City Pharmacy
University College
University of Otago
Volunteer South
Waikouaiti Karitane Parish
Wakari School
Watties
Webb Farry Lawyers
Who Ate All The Pies
York Place Preschool & Nursery
Zeagold Foods

Legacies

Estate of H Gray
Estate of M Malcolm
Estate of DS Malcolm
Estate of J P Schwass
Estate of LE Watson
Estate of NJF Dy
Estate of P Weipers
Plowman Estate
Estate of R Leonard
Estate of RG Atkinson
Estate of RH Clark
Johnstone Trust

Make a Difference!



YES, I WANT TO SHOW MY SUPPORT!

My contact details are:

First Name Surname

Address

Phone

Email

Amount \$

Credit Card Payment Details

Card number

Name on card

Expiry date CVC

Signature

How to return this form:

POST Fundraising Team, Presbyterian Support Otago, FREEPOST 845, PO Box 374, Dunedin 9054

EMAIL fundraising@psotago.org.nz

Please tick payment method

- Cheque** (To Presbyterian Support Otago)
- Credit Card**
- Internet Banking**
Account Name PSSO
Account Number 06 0901 0005597 00
Ref: Your first name and last name and include the word AR-DONATION. For receipt purposes, please fill out the Contact Details part of this form and return it to us.

- Donate Online**
If you would like to support us with an online donation, visit www.psotago.org.nz/get-involved/donate/



Please direct my gift to :

- Family Works
- Enliven
- Where the greatest need is

Please let us know if:

- you have left a gift to PSO in your will
- you would like more information about leaving a gift in your will
- you would like more information about volunteering for PSO

(All donations are receipted. Gifts over \$5.00 are tax deductible. Charities Commission number CC 20878)

Getting Involved

Our supporters have contributed significantly to our work across Otago during the past year. Our volunteers generously gave their time to support our foodbank, our care homes and older people in the community. They also joined the Buddy Programme and supported children and young people facing challenging times. Some have left bequests, and many have contributed financially. The achievements noted in this report would not have been possible without this support. Thank you.

There are three ways you can join our team and become a supporter:

Make a donation: All donations help us to give assistance and support to children, families and older people in need across Otago.

Leave a gift in your will: Presbyterian Support has cared for the people of Otago for over a century. Help us continue to care for the Otago community into the future by including Presbyterian Support Otago in your will.

Volunteer: Do something extra special with your day and volunteer with us. With lots of jobs to choose from, we are sure to find the right fit for you; Charity shop assistant, Adult Buddy, YouthGrow assistant, Visiting Volunteer, foodbank assistant and driver are just some of the roles we need help with.

Denise says the smiles on the residents' faces when she arrives is the thing that motivates her to continue volunteering at Ranui. "The residents really appreciate it. The staff are also fantastic". She says it's a really nice place to spend time in between her daily walks and keeping busy with the gardening club she is involved with in Alexandra.

Denise Phillips is a dedicated volunteer at Ranui in Alexandra.

If you would like to find out more about making a donation or joining our team please visit our website – psotago.org.nz



Presbyterian Support
Otago

Family Works Wanaka
All Enquiries 03 477 7116
Wanaka Community Hub
34 McDougall Street Wanaka

Enliven Wanaka
Elmslie House 03 443 7899
81 Stone Street Wanaka
Aspiring Enliven Care Centre
03 555 3010
21 Cardrona Valley Road Wanaka
Wanaka Retirement Village
03 443 4474
5/7 Meadowstone Drive Wanaka

- Support Centre**
- Family Works**
- Enliven**
- Cottages and Villages**
- Retail Shops**

Family Works Oamaru
All Enquiries 0508 396 262
Good Shepherd 0800 477 711
Oamaru Community House
100 Thames Street, Oamaru

Enliven Oamaru
Iona 03 437 1870
549 Thames Highway, Oamaru, 9400



Family Works Alexandra, Ranfurly, Cromwell & Queenstown
All Enquiries 03 477 7116
Good Shepherd 0800 477 711
Alexandra Community House
14/20 Centennial Ave, Alexandra

Enliven Alexandra
Ranui 03 448 8280
4 Chapple Street, Alexandra

PSO Support Centre/ Head Office

All Enquiries 03 477 7115
407 Moray Place, Dunedin, 9054
PO Box 374, Dunedin, 9054

Family Works

All Enquiries 03 477 7116
407 Moray Place, Dunedin

Macandrew House Family Works
Stepping Stones 03 470 0815
Good Loans 0800 477 711
186 Macandrew Rd, South Dn

Green Island Family Works
198 Main South Rd, Green Island

Youthgrow 03 473 1334
146 Norwood St, Dn

Enliven Dunedin

Club Enliven 03 473 0890
407 Moray Place, Dn

Ross Home 03 473 0029
360 North Rd, Nth East Valley, Dn

St Andrews 03 455 4396
8 Easter Crescent, Dn

Taieri Court 03 489 6044
5 Hartstonge Avenue, Mosgiel

Shop On - Charity Shops

Shop on Carroll 03 471 8249
10 Carroll St, Dunedin
www.shopon.org.nz

Op Shop on St Andrew
03 477 5019
59-61 St Andrew St, Dunedin

Community Finance / Good Loans
All Enquiries 0800 477 711
Offices in Dunedin, Alexandra, Oamaru, Timaru, Nelson & Blenheim

Family Works Balclutha
All Enquiries 03 418 0463
PO Box 95, Balclutha

Enliven Balclutha
Holmdene 03 418 1468
15 Elizabeth Street Balclutha



8 care homes
3 retirement villages
Club Enliven
Visiting Volunteers

Foodbank
Social support and programmes
YouthGrow

Shop on Carroll
Op Shop on St Andrew
Shop On Online

812 STAFF

550 VOLUNTEERS

www.psotago.org.nz