

# TOGETHER WE MAKE A DIFFERENCE

ANNUAL REPORT 2014



*Presbyterian  
Support  
Otago*

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A rare opportunity  
for Stepping Stones'  
clients to visit  
Middlemarch

photographer  
Michael Schouten



# MISSION STATEMENT

## VISION

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

## MISSION STATEMENT

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

## VALUES

In fulfilling this vision, we will endeavour to act with Faith, Compassion, Respect, Integrity, Courage and Independence.

# STRATEGIC GOALS 2012–2015

## GOAL 1 OUR SERVICES

**Build strong and connected communities that meet the needs of individuals and families/whanau**

- (a) To provide quality services that are flexible, responsive and best meet the needs of older people
- (b) To provide community-responsive services which strengthen families and meet individual needs

## GOAL 2 OUR PRESENCE

**Provide leadership within the sector**

- (a) To influence social change through sector leadership, facilitation, partnership and research-based advocacy
- (b) To cultivate a reputation as a credible and accountable service provider

## GOAL 3 OUR ORGANISATION

**Maximise resource to deliver on our Mission**

- (a) To have a workplace culture that helps us deliver on our Mission
- (b) To provide a stable funding platform that resources on-going programmes, delivery of services and strategic development



## CHAIRMAN'S REPORT

It is with much pleasure that I present my first report as Chairman of Presbyterian Support Otago – a report that reflects our Mission Statement in all that we do; strengthened by the partnerships formed across many of our services.

We are an organisation that understands what it means to orientate a business around those we seek to support, so have been happy to form strategic alliances and partnerships for better outcomes in what has been a challenging operating environment.

The formation of the Family Works National Service Development Unit is just such an alliance. All seven Presbyterian Support regions in New Zealand have joined to form this unit that will provide a national approach to Family Works' practice, services and client outcomes. It will also support the submission of tenders for national contracts, and engage at a national level with government and non-government organisations on Family Works matters.

Another strategic move during the year was to form a fifty-fifty joint venture partnership with the owners of Aspiring Lifestyle Retirement Village. This partnership will build a new care home in Wanaka, offering the growing region a complete rest home, hospital and dementia care service along with a small hospice unit, together with the Upper Clutha Hospice Trust.

Throughout this report you will read of other such affiliations that drive our focus on our mission, vision and values to improve and expand our unique service offering. We are an organisation that is not afraid to learn and change; attributes, perhaps more than any others, which are essential to long-term growth.

We continued to invest in capital infrastructure. The total re-build of the Kirkness wing at Iona in Oamaru, and earthquake strengthening and maintenance work at Ross Home, Dunedin, being the two major capital items this year.

Financially, it's been yet another year of belt-tightening as we strive to achieve levels of excellence in the face of rising costs and restricted income. The generosity of donors again has been significant, and I assure them that as we carefully plan for the years ahead we will continue to be responsible stewards of their valued contributions.

In-house, we have continued to support and strengthen our staff and volunteers, which in turn benefits those who access our services. On behalf of the Board, I wish to thank these people for the sterling work they do for our clients, residents and indeed, our whole organisation.

I would like to record my appreciation of the valuable contribution made by Board member Reg Weeks. Reg was a Presbytery appointment representing Central Otago for 16 months before leaving the region in March 2014.

The calibre and commitment of our Chief Executive, Gillian Bremner, and her team continue to impress me. The person-centred service model they espouse and their encouragement of staff members to be pro-active in their roles while at the same time developing healthy, balanced personal lifestyles, is commendable.

To my Board colleagues, thank you for the time and expertise you so willingly brought to the table, and for the opportunities to make a difference, together.

A handwritten signature in blue ink, appearing to read 'David Richardson', written over a horizontal line.

David Richardson  
Chairman



## THE BOARD



David Richardson  
(Chairman)



Gillian Bremner  
(Chief Executive)



Tim Mephram  
(Deputy Chair and  
Audit Committee  
Chair)



Ray Macleod  
(Corporate  
and Finance  
Committee Chair)



Margy-Jean  
Malcolm  
(Governance  
Committee Chair)



Frazer Barton



Gaye Edwards



Lindsay Alderton



John Angus



Graham Redding



Bev Rodwell



Helen Scott



Reg Weeks  
(Resigned March 2014)

## THE SENIOR LEADERSHIP TEAM



Gillian Bremner  
(Chief Executive)



Andrew Borthwick  
(Finance Director)



Maurice Burrows  
(Services for Older  
People Director)



Paul Hooper  
(Family Works  
Director)



Lisa Wells  
(Development Director.  
Resigned June 2014)



## AT A GLANCE

<b>\$27.4m</b>	- total income for the 2013/14 year
<b>\$27.3m</b>	- total expenditure for the year
<b>\$170,000</b>	- operating surplus
<b>\$59.1m</b>	- total assets
<b>\$16.3m</b>	- total liabilities
<b>\$873,000</b>	- income from donations, grants and bequests
<b>\$19m</b>	- employment related costs; 69% of total expenditure
<b>\$228,000</b>	- revenue from sale of gifted property
<b>\$91,000</b>	- write-down of investment properties

# CHIEF EXECUTIVE'S REPORT

Presbyterian Support Otago is more than a social service agency that holds contracts with government to provide services across the age range from vulnerable children, families and young people through to the elderly.

We also work in partnership with communities to bring about a better world for those who are struggling, through a community development approach that harnesses the potential within a community for people to reach out to each other.

Advocacy services continue to be an important aspect of our work both at an individual and community level, striving for change that will make a difference.

Life is tough for many and each year the demand for services increases. So we look to how we can strengthen the work we do in partnership with others.

Particular highlights for me in the past year were:

- The broader focus of our work with youth in various ways including YouthGrow, youth budgeting, reintegration of young offenders, and youth engagement at school;
- Increased community development/community mission activity
- Continued high occupancy rates across our seven care homes.

Our increasingly ageing population continues to see strong demand for residential care services; and waiting lists were kept; the Taieri and Central Otago regions in particular struggle to keep up with demand.

Of particular note in residential care is our increased focus on quality systems, including clinical governance

that looked at particular performance indicators benchmarked with other providers. This, coupled with the continued emphasis on a service philosophy that honours the uniqueness of each individual resident, ensures our well deserved reputation for excellent care in residential services for older people.

Capital development over the past year has seen the completion of the Kirkness redevelopment at Iona and earthquake strengthening at Ross Home where some parts of the building date back 95 years.

The year ahead will see increased investment in Family Works at a national level as we demonstrate a national approach to a practice framework and outcomes. Much of Family Works will continue with 'business as usual' providing vital support to people in need where we see every day the positive impact of our services.

In Services for Older People we will expand residential care services in Wanaka with the construction of a new care facility in partnership with Aspiring Lifestyle Retirement Village.

Careful consideration will be given to overall strategic capital expansion in residential care/retirement villages.

Finally, I want to acknowledge the significant commitment from staff and volunteers to the work of Presbyterian Support Otago. Thank you to each one of you who goes out of your way to make a difference for others.

My personal thanks also to Senior Leadership Team members who are so committed to the success of this organisation and the work that it does. Of special mention is the work of Lisa Wells, Development Director, who resigned in June after ten years in the role, to take on an exciting new position with the national Presbyterian Church. Lisa led the Communication, Marketing & Fundraising Department but also played a vital role in our relationship with the Church at various levels. We look forward to working with Lisa in her new role.



*Gillian Bremner*

Gillian Bremner  
Chief Executive



# COLLECTIVELY SUPPORTING FAMILIES



The continuing upward trend of families and individuals requesting assistance, the complexity of the issues they present and their inability to make headway through other avenues, resulted in a particularly difficult year for Family Works.

More working families faced unemployment or reduced incomes. Financial limitations often led to relationship breakdowns, family violence and mental health challenges, not to mention the neglect of children. More single men and women of all ages and without children sought budgeting support – a service not available to them from other agencies concentrating on assisting families only.

Simply providing food parcels is not a solution for most of our clients; they increasingly need more intense support involving several of our services. Fighting harder battles to ensure basic human rights of clients are achieved is a daily encounter for our social and youth workers.

We are well known for our ability to provide strong advocacy for clients in challenging or unfair situations, and that work increased significantly during the year as changes within the Ministry of Social Development (Work and Income), Housing New Zealand and the Family Court system, combined with other policy changes, challenged the ability of many people to stand up for themselves. Those caring for children with disabilities faced a particularly difficult road.

By identifying where referrals originated we were able to strengthen our connections and communications with those non-government providers and government departments concerned, and as a result work more collaboratively with them and others for better outcomes for families and individuals.

A further enhancement was the number of formal and informal partnerships we established. The Fono Faufautua E Samoa I Otago (Samoan Advisory Council) Memorandum of Understanding has meant a sharing of resources and a strengthening of our capabilities when working with clients of Pacific Island descent. A contract with the Dunedin Community College saw us deliver six Youth Budgeting Courses during the year. Positive feedback from the 108 young people who attended was particularly encouraging.

We were approached by the Dunedin Secondary Schools Partnership to provide a family service for youth identified as disengaging with education in the Ministry of Social Development's Social Sector Trial in South Dunedin.

One new contract has us working closely with the Department of Corrections' Probation Service. Called Out of Gate, this service sees us supporting women released from correction facilities in their reintegration back into society.

Our Total Money Management contract with the Southern District Health Board's mental health services was reduced to just eight hours weekly, meaning this service is limited to working with 13 long-term mental health clients within the reduced hours.

Right across our services outside of Dunedin we have seen a lack of emergency housing become a major issue with some victims of domestic violence being housed in motels. Wanaka is of particular concern because our social worker, who works part-time, is the only one in the district. The disturbing increase in abusive relationships in Wanaka, the fact families have to travel to Alexandra or Queenstown for appointments with WINZ, no public transport, and lack of services for young people, continue to be of very serious concern. Referrals for the support of single mothers with young children have resulted in the formation of a group where they connect for social interaction, educational help and skill-building workshops. This has been very well received.

Our partnership with Maniototo Area School sees our part-time Ranfurly social worker gain further

## AT A GLANCE

- 3662 – a 22.6% increase in the number of people accessing welfare services
- 2205 – a 26.4% increase in the number of food parcels given out
- 222 – Buddy Programme pairs
- 100 – Young Buddies waiting to be matched with volunteer Adult Buddies
- 214 – unique counselling clients
- 108 – youth attending Youth Budgeting Courses
- 51 – referrals to Strengthening Families
- 33 – active clients at Stepping Stones
- 20 – YouthGrow students





Buddy Programme group activities continue to be popular.

photographer Michael Schouten

reach into that community's concerns around youth challenges. This has been supported by group work in school classes.

A waiting list of families asking for assistance is putting added pressure on our part-time social worker in Oamaru, a town that has recently seen two family support agencies exit the area due to funding constraints. Eveline Presbyterian Church parishioners have supported our work by providing fresh produce and emergency meals to clients. We provided facilitation and follow-up for a Sophie Elliot Foundation programme conducted in a number of the town's secondary schools.

In Alexandra we joined several other service providers and the local newspaper in easing the financial burden experienced by clients at Christmas time. Entitled 'Santa's Little Helpers', the focus was on skills-based workshops, providing financial tips and gift making ideas to help budgets stretch further. On-going support was provided to parents participating in our Incredible Years parenting programme, and inter-agency forum participation looked at the community-wide issues of transport, youth and welfare.

The Buddy Programme remains a key early-intervention service across the region although the recruitment of Adult Buddy volunteers remains a challenge, particularly in North and South Otago where there are long waiting lists for Buddy matches. This year the programme gained National Youth Mentoring Organisation accreditation. Another successful programme for children is Growing Taller; six term-long programmes were held last year catering for 33 children.

Forty two parents from Mosgiel, Balclutha and Alexandra took part in Incredible Years. With comments like 'I actually like my kids again' and 'It's easier now I'm being consistent, thanks to you', we are pleased the Ministry of Education has agreed to fund the programme for a further three years. Ministry of Education feedback indicated our parent completion results well exceeded other contracted

providers. Another family-focused contract renewed for three years was that of Strengthening Families, which had 51 referrals for families who would benefit from the multi-service meeting formula that provides better engagement and advocacy.

Counselling was in constant demand and we are aware a number of other providers have restricted their availability to free or low-cost clients. Our 214 unique clients were a mix of 50% adults, 30% adolescents and 20% family therapy interventions. Our counsellor sees a significant number of ACC sensitive-claim clients, more so than other providers. She also facilitates the Grandy's Support Group of 21 grandparents raising grandchildren.

YouthGrow continues to provide a niche service albeit one that's had to change in line with funder's requirements. The focus is now on holistic youth development outcomes including life skills, health and nutrition, group skills, social development and work readiness, using horticulture as a base for industry qualifications. In the garden centre itself, stock quality improved significantly and we now have a hawker's licence to expand market sales in Dunedin and Mosgiel.

Stepping Stones clients (adults with long term mental health diagnoses) went out and about more this year for better integration into community activities. As they gain confidence in attending public facilities like swimming pools, movie theatres, libraries and churches they will become less reliant on centre-based programmes.

The strategic move of enabling people to access our services within their immediate community has steadily built over the past three years under the community development model. We continue to refine our practice framework in this field, with residents in North East Valley, Pine Hill and Caversham in Dunedin; and Alexandra, Ranfurly and Cromwell in Central Otago, benefiting from our facilitation. Positive government confirmation that our initiatives have the desired outcomes resulted in a recent grant to the Greater Green Island Community Network from the Department of Internal Affairs.



Supporting a Green Island community expo.



## STRONGER COMMUNITIES

Coffee groups, community dinners, school holiday programmes and sports groups all sound far removed from traditional welfare services provided by our social work team, but the community development model proves that for most clients and families the chance to work together for the good of the whole community can provide better outcomes.

Pine Hill residents continued to embrace the opportunity to build on community strengths, identify gaps in local resources and support individuals in need. When it became apparent that a base was needed, a timely offer came from the Anglican Church for space in its St Thomas Church to be used as Pine Hill Community Rooms. That was a turning point for the community; residents now have somewhere to meet for quiet conversation, group meetings, fund-raising events and more recently, school holiday programmes. A public health nurse and other health professionals visit, and the number of friendships formed between residents grows by the day.

Dunedin's Caversham Presbyterian Church sought our assistance in developing community projects in their area. Within just a few months local churches, businesses, schools, groups and individuals were co-operating to create more positive outcomes for residents across all age groups.

### 'OUR CHILDREN ARE SAFER'

That was the over-riding message from families living in Dunedin's Pine Hill – a suburb where community development was embraced as a means of enriching the lives of those who live there.

For a father of three school-age children the fact he can now let them walk to school by themselves knowing others in the neighbourhood look out for them on their journey, is a big bonus of getting to know his neighbours.

"I have limited mobility and taking the kids to school and meeting them afterwards was always difficult. Now I know other parents are aware of my situation and look out for my kids, it's a big help," he said.

"The kids and me used to stay home a lot because I didn't know anyone here but now we've joined in some activities organised by Tracey (Family Works Community Development Social Worker Tracey Fuatavai) we've met others like us and it's all good," he said.

Further down Pine Hill Road a young mother of two pre-schoolers said, "It's easy to stay home when you don't have any money but Tracey persuaded me to join the weekly coffee group

and from that I've become more involved in community activities.

"She encouraged me to use my computer skills and I also helped at the jumble sale and school holiday programme, which my kids love," she said. "The programme is a safe place for them to be and meet other kids. Also they have toys to play with that we don't have at home. They're happy, I'm happy and we're getting to know more and more others who live on the hill."

Tracey said an unexpected benefit of connecting residents through various activities was the mixing of generations.

"The school holiday programme is a great example of that because we have members of our coffee and over-60s groups prepare the healthy lunches for the children and helpers, members of both the Presbyterian and Anglican Churches all contribute, as do non-working parents, and we even have residents with no children pop in to help in various ways.

"I'm amazed at how resourceful these people are. With just a little encouragement they get together and make things happen. Right now they've identified a need for an after-school homework group and a morning playgroup, and I know those new programmes will be a reality soon," Tracey added.



A healthy lunch at Pine Hill school holiday programme.



# STRENGTH ACROSS THE SERVICE

## SERVICES FOR OLDER PEOPLE

The expansion of our residential care services for Upper Clutha residents was warmly received when announced during the year. To be called Aspiring Enliven Care Centre, it is a joint venture between Presbyterian Support Otago and Aspiring Lifestyle Retirement Village and will be built on land next to the Aspiring village in Wanaka. Under PSO management, it will provide rest home, hospital, dementia and hospice, with stage one starting early 2015. Once the home opens, Elmslie House is expected to find its niche in the expanded market. Collectively the two facilities will offer staff greater employment and career opportunities.

In a year that saw serious competition amongst residential care providers, we continued to maintain high occupancy levels. Across six of the seven homes the average was 95%, the exception being Iona in Oamaru that reduced room numbers during the rebuild of the Kirkness wing. Taieri Court achieved 98.2% occupancy, the highest overall. Underpinning those figures is our reputation for excellent service built around recognising the importance of simple human values in everything

we do for residents. Demand for dementia care also remained high during the year.

During the year Iona residents helped the Iona Playgroup celebrate 20 years of meeting weekly at the home. The pre-school children are greeted warmly by many residents who take part in action songs and story reading. This group, and the St Kevin's students who regularly visit residents, are valuable inter-generational links that are important in helping residents feel they continue to be part of the wider community. Other North Otago residents contributed to the fit-out and furnishing of a dedicated family/whanau room at Iona.

The construction of a new medical centre and care home on the site of the old Tapanui Hospital, adjacent to the now-empty independent cottages, has been an exciting development for the people of West Otago. We have had a long association with this community and were pleased to assist with in-house expertise in the development phase. Funds accumulated over the life of the independent cottages were held in trust by PSO and have now been passed over to the West Otago Health Trust for the care home development, bringing our involvement to a conclusion.

Community involvement wouldn't be possible without the input of our strong volunteer base. Volunteer numbers increased throughout services for older people and many were formally recognised during the year's long-service award ceremonies. We sincerely appreciate the contribution volunteers make to the

### AT A GLANCE

- 95% – average occupancy rate across all our care homes except Iona where room availability was temporarily reduced during a major rebuild
- 99% – occupancy in the Cedars rest home level dementia unit at St Andrews, Dunedin
- 94% – the overall satisfaction level of participants in all 21 surveys in our services for older people; 17 of the 21 were 100%
- 4 – Ross Home, Holmdene, Ranui and Elmslie House all carried Ministry of Health four-year certification
- 42,664 – the number of midday Meals on Wheels provided from Taieri Court, Holmdene, Elmslie House and Ranui kitchens
- 50% – caregivers holding NZ National Health, Disability and Aged Support Core Competencies Level 3 qualifications



Iona Playgroup's weekly sessions are popular across the generations.



Life Member Isabel Van Royan cuts the Enliven Visiting Volunteer Service's 30th anniversary cake.



daily lives of residents, whether it be one-on-one visiting, book readings, assistance with outings or guiding hands over board games. In a role reversal, some Ross Home residents helped community volunteers collate and fold the local newspaper.

Also contributing to their local communities were our kitchen teams in Taieri Court, Holmdene, Ranui and Elmslie House. They provide hot midday meals for Meals on Wheels clients: 19,792 from Taieri Court; 17,085 from Holmdene; 3923 from Elmslie House; and 1864 from Ranui.

Our drive to provide more flexible, responsive services has seen more in-depth work in the area of benchmarking clinical indicators, with detailed reporting on trends and identifying areas for quality improvement initiatives. The clinical governance advisory group was strengthened with the appointment of two external representatives; a new initiative was the establishment of senior nurse forums for shared experiences and information; and we participated for a second time in Presbyterian Support New Zealand research into the use of anti-psychotics in dementia care.

Independent living continued to be provided through our three boutique villages in Wanaka, Alexandra and Oamaru. In the year ahead consideration will be given to expanding Ranui Court Retirement Village in Alexandra. Rental cottages and apartments in Wanaka, Oamaru, Dunedin and Milton continued to be popular and operated with waiting lists.

# ENCOURAGING INDEPENDENCE



It was our first full year without Enliven Positive Ageing Services home support and focus centred on community-based activities in Dunedin and Central Otago.

Enliven HomeShare, in Alexandra, gained a SouthernDHB contract during the year. HomeShare caters for older people with mild to moderate dementia. Up to three 'guests' spend a day a week in the home of a host undertaking ordinary leisure activities and sharing a hot meal. Hosts adapt activities to their guests' levels of functioning, helping them retain skills and roles, and encouraging independence and communication.

Both Enliven Visiting Volunteer Service clients and volunteers were surveyed during the year; clients confirmed the value they placed on the friendships formed with volunteers and volunteers registered their satisfaction in providing the service that celebrated 30 years in 2013. That milestone was honoured with a large gathering of current and previous volunteers, and the cake was cut by PSO Life Member Isobel Van Royan who started as a volunteer before the service was formalised.

We welcomed the expansion of the Enliven Individualised Funding service to Central Otago and Southland. Total clients supported during the year reached 37. Day activity groups Maybank and Club Enliven continued. The men's group that formed within Maybank was very well received and will continue.

Four family/whanau carer training sessions and eight young carer evenings were held during the year; all well attended and appreciated.



Ross Home residents help their local community by folding the local newspaper for distribution.



Choose Kids volunteers prepare vegetable soup.



## SUPPORTING OUR SERVICES

An increasing number of individuals and organisations assisted us in our work of providing leading services and community and sector leadership during the year. Volunteers continue to impress us with their commitment right across our services whether that is forming one-on-one friendships with care home residents, mentoring children, or with the myriad of other volunteer opportunities we have.

University of Otago medical students, under an initiative they called Choose Kids, rolled up their sleeves on a regular basis to source fresh ingredients and make them into meals that were then frozen for our Family Works foodbank. Parishes also supported us in many ways, especially at Christmas.

PresCare, the national partnership between the Presbyterian Church of Aotearoa New Zealand and Presbyterian Support New Zealand, continued to provide an opportunity for us to work together. With the support of our Community Mission Liaison Worker some churches took up the PresCare offer of funding for Neighbours Day, a time when community activities are held aimed at connecting neighbours. Our focus remains that of working with churches that want support to be more engaged with their community.

Sector leadership was reflected in Presbyterian Support NZ regions collectively establishing the Family

Works Service Development Unit to provide a national approach to services and client outcomes. Family Works Otago also took an active role in forming a NGO practice manager's group in Dunedin. During the year we conducted research into low-income rental housing in Dunedin, and our Chief Executive was a driving force in setting up the Cosy Homes steering group. We are represented on the Alzheimers Society Otago and Otago Polytechnic Nursing School Reference Group and were instrumental in the New Zealand Council of Christian Social Services conference on older people held in Dunedin.

Working behind the scenes ensuring front-line service staff members are resourced, are the support services teams that in many cases go well beyond what is asked of them in their roles. Our HR Advisor continued to deliver leadership training sessions and recommendations from reward and recognition research is being incorporated in our 'one team' framework. Surveys covering a smoke-free work place and volunteer health and safety were conducted.

Our three op shops faced challenging competition from an increasing number of other charity shops and from commercial retailers selling new clothing at charity shop prices. Therefore it was pleasing to see them achieve an overall net result of \$52,839, slightly ahead of budget. Great donations, the input of volunteers and excellent customer service provided by staff ensured a valuable contribution to Family Works services.



Volunteer Julie Orr-Wilson inspires shoppers with her window displays at Shop on Carroll.





Local business staff get in to the spirit of OCTACAN.

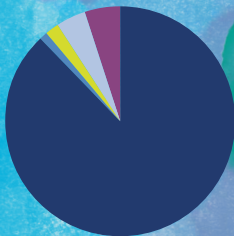
### AT A GLANCE

- \$509,586** – income from donations and bequests
- \$363,414** – grant income
- 51%** – donors with parish association
- 4039** – personal visits made to donors
- 20** – Family Works Guardian Angels

Goods-in-kind were boosted by an increase in foodbank items from Dunedin’s Foodshare service that collects surplus fresh food from commercial outlets, and in donations to OCTACAN, our mid-winter can appeal in Dunedin. Pre-schools, schools, businesses and individuals added 10,785 items to our then-empty foodbank in June.

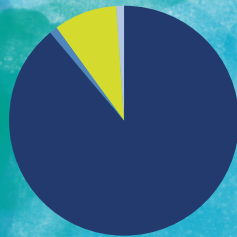
We continue to work in a challenging fundraising environment where grant income from traditional sources can no longer be relied upon. Income from appeals increased slightly while donation, grant and bequest income dropped by \$29,000; however, the outstanding overall result of \$873,000 contributed significantly to our work during the year.

For more information on financial matters, please refer to the summary accounts on the following pages, or visit our website [www.psotago.org.nz](http://www.psotago.org.nz) to download a copy of the full audited accounts.



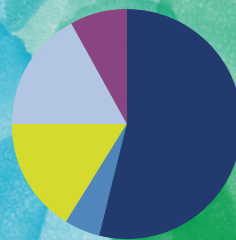
**SOURCE OF INCOME 2013/14**

- Services for Older People Residential – 88%
- Services for Older People Non Residential – 1%
- Family Works – 2%
- Investments and Other – 4%
- Donations/Grants/Bequests/Fundraising – 5%



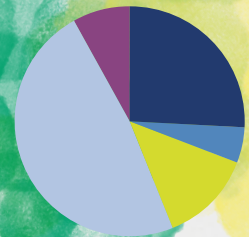
**EXPENDITURE BY SERVICE 2013/14**

- Services for Older People Residential – 89%
- Services for Older People Non Residential – 1%
- Family Works – 9%
- Other – 1%



**EXPENDITURE BY REGION 2013/14**

- Dunedin – 54%
- Taieri – 5%
- North and East Otago – 16%
- Central and West Otago – 17%
- South Otago – 8%



**PHILANTHROPIC GIVING 2013/14**

- Appeal Income – 26%
- Parish Giving – 5%
- Goods in Kind – 13%
- Grants – 48%
- Other – 8%



# PRESBYTERIAN SUPPORT OTAGO INCORPORATED

## SUMMARY INCOME STATEMENTS

For the Year ended 30 June 2014

	Group 2014 \$000's	Group 2013 \$000's	Parent 2014 \$000's	Parent 2013 \$000's
<b>Continuing Operations</b>				
<b>Income</b>				
Services for Older People	24,258	23,618	24,284	23,644
Family Works	1,370	1,535	1,370	1,535
Other Activities	1,819	1,838	1,352	1,435
<b>Total Income</b>	<b>27,447</b>	<b>26,991</b>	<b>27,006</b>	<b>26,614</b>
<b>Expenditure</b>				
Services for Older People	22,845	22,761	22,845	22,761
Family Works	2,361	2,410	2,361	2,410
Other Activities	1,929	2,042	1,516	1,666
Finance Costs	142	17	419	320
<b>Total Expenditure</b>	<b>27,277</b>	<b>27,230</b>	<b>27,141</b>	<b>27,157</b>
Operating Surplus / (Deficit) – from Continuing Operations	170	(239)	(135)	(543)
Surplus from Discontinued Operations	-	286	-	286
<b>Non-Operating Movements</b>				
Disposal of Enliven Contract	13	119	13	119
Gift of 12 Middleton Road	228	-	228	-
Movement in Obligations to Purchase Unit Titles	(15)	-	-	-
Revaluation of Investment Properties	(91)	(84)	(91)	(84)
<b>Total Non-Operating Movements</b>	<b>135</b>	<b>35</b>	<b>150</b>	<b>35</b>
<b>Net Surplus / (Deficit) for Year</b>	<b>305</b>	<b>82</b>	<b>15</b>	<b>(222)</b>

## SUMMARY STATEMENTS OF COMPREHENSIVE INCOME

For the Year ended 30 June 2014

	Group 2014 \$000's	Group 2013 \$000's	Parent 2014 \$000's	Parent 2013 \$000's
Net Surplus / (Deficit) for Year	305	82	15	(222)
Other Comprehensive Income				
Operating Property Revaluation	1,255	(3,312)	1,100	(3,312)
<b>Total Comprehensive Income</b>	<b>1,560</b>	<b>(3,230)</b>	<b>1,115</b>	<b>(3,534)</b>

## SUMMARY OF STATEMENTS OF CHANGES IN EQUITY

For the Year ended 30 June 2014

	Group 2014 \$000's	Group 2013 \$000's	Parent 2014 \$000's	Parent 2013 \$000's
Opening Balance of Equity	41,207	44,437	40,822	44,356
Plus:				
Total Comprehensive Income	1,560	(3,230)	1,115	(3,534)
<b>Closing Balance of Equity</b>	<b>42,767</b>	<b>41,207</b>	<b>41,937</b>	<b>40,822</b>



## SUMMARY BALANCE SHEETS

As at 30 June 2014

	Group 2014 \$000's	Group 2013 \$000's	Parent 2014 \$000's	Parent 2013 \$000's
<b>Equity</b>	42,767	41,207	41,937	40,822
Represented by:				
<b>Current Assets</b>	5,153	3,959	3,081	2,819
<b>Non-Current Assets</b>	54,008	52,468	51,226	49,813
	59,161	56,427	54,307	52,632
<b>Current Liabilities</b>	13,689	13,763	9,665	10,353
<b>Non-Current Liabilities</b>	2,705	1,457	2,705	1,457
	16,394	15,220	12,370	11,810
<b>Net Assets</b>	<b>42,767</b>	<b>41,207</b>	<b>41,937</b>	<b>40,822</b>

Signed for and on behalf of the Board as at 24th September 2014:



Mr Tim Mepham  
Deputy Chairperson



Mrs Gillian Bremner  
Chief Executive/Trustee

## SUMMARY STATEMENTS OF CASH FLOWS

For the Year ended 30 June 2014

	Group 2014 \$000's	Group 2013 \$000's	Parent 2014 \$000's	Parent 2013 \$000's
Net Cash flows from Operating Activities	1,569	751	1,538	705
Net Cash flows to Investing Activities	(1,248)	(3,060)	(2,471)	(3,090)
Net Cash flows from Financing Activities	1,248	1,723	1,248	1,723
Net Cash Flow	1,569	(586)	315	(662)
Opening Balance at 1 July 2013	1,528	2,114	780	1,442
Closing Balance at 30 June 2014	3,097	1,528	1,095	780



# NOTES TO THE SUMMARY FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 JUNE 2014

These are the summary financial statements of Presbyterian Support Otago Incorporated and group for the year ended 30 June 2014.

The specific disclosures included in these summary financial statements have been extracted from the full annual financial statements authorised for issue on 24 September 2014. The full annual financial statements have been prepared in accordance with the New Zealand Equivalents to International Financial Reporting Standards (NZ IFRS) and other applicable financial reporting standards as appropriate for public benefit entities.

This summary financial report cannot be expected to provide as complete an understanding as provided by the full financial statements.

An unmodified audit opinion has been received on the full financial statements for the year ended 30 June 2014. A copy of the full financial statements for Presbyterian Support Otago Incorporated for the year ended 30 June 2014 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 24 September 2014.

## **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 are the summary financial statements of Presbyterian Support Otago Incorporated and they comply with FRS 43: Summary Financial Statements. The presentation currency is New Zealand dollars, rounded to the nearest whole thousands (\$000's). The full financial statements upon which these Summary Financial Statements are based, have been prepared to comply with NZ GAAP.

## **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.





## ***Report of the Independent Auditors' on the Summary Financial Statements***

to the Board Members of Presbyterian Support Otago Incorporated

The accompanying summary financial statements, which comprise the summary balance sheets as at 30 June 2014, the summary income statements, summary statements of changes in equity and the summary statements of cash flows for the year then ended, and related notes, are derived from the audited financial statements of Presbyterian Support Otago Incorporated for the year ended 30 June 2014.

The summary financial statements do not contain all the disclosures required for full financial statements under generally accepted accounting practice in New Zealand. Reading the summary financial statements, therefore, is not a substitute for reading the audited financial statements of Presbyterian Support Otago Incorporated.

Our audit of the financial statements for the year ended 30 June 2014 was completed on 24 September 2014 and our unmodified opinion was issued on that date. We have not undertaken any additional audit procedures in relation to those financial statements from the date of the completion of our audit and those financial statements and the summary financial statements do not reflect the effects of events that occurred subsequent to the date of our report on those financial statements.

This report is made solely to the Board Members, as a body. Our work has been undertaken so that we might state those matters we are required to state to them in a report from the auditor and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Board Members, as a body, for this report, or for the opinions we have formed. In addition, we take no responsibility for, nor do we report on, any part of the annual report not specifically mentioned in our report.

### ***Board Members' Responsibility for the Summary Financial Statements***

The Board Members are responsible for the preparation and presentation of the summary financial statements in accordance with FRS-43: Summary Financial Statements. ("FRS 43").

### ***Auditors' Responsibility***

Our responsibility is to express an opinion on the summary financial statements based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) 810: Engagements to Report on Summary Financial Statements.

Other than in our capacity as auditors we have no relationships with, or interests in, Presbyterian Support Otago Incorporated or any of its subsidiaries.

### ***Opinion***

In our opinion, the summary financial statements have been correctly extracted from the audited financial statements of Presbyterian Support Otago Incorporated for the year ended 30 June 2014 are consistent, in all material respects, with those audited financial statements.

### ***Restriction on Use of our Report***

This report has been prepared for inclusion in the annual report. We disclaim any responsibility for reliance on this report or the amounts included in the summary financial statements, for any purpose other than that for which they were prepared.

*PricewaterhouseCoopers*

Chartered Accountants  
24 September 2014

Dunedin

*PricewaterhouseCoopers, Westpac Building, 106 George Street, PO Box 5848, Dunedin 9058, New Zealand  
T: +64 3 470 3600, F: +64 3 470 3601, pwc.co.nz*



# ACKNOWLEDGEMENTS

Presbyterian Support gratefully acknowledges the support of the Otago community. Bequests, grants, gifts and donations are an important part of our income and make it possible for us to live out our Mission each year. We sincerely thank those who

have supported us, who share our values and our commitment to making a difference.

We received significant support from the following companies and trusts in the year ended 30 June 2014:

## GRANTS

AAW Jones Charitable Trust  
Alexander McMillan Trust  
Callis Charitable Trust  
Central Lakes Trust  
Central Otago Lend a Hand Foundation  
Community Organisations Grants Scheme  
Community Trust of Maniototo  
Community Trust of Southland  
Dunedin Casino Charitable Trust  
Dunedin City Council  
Graham and Olive West Charitable Trust  
Healthcare Otago Charitable Trust  
HJ Wilson Charitable Trust  
JN Lemon Trust  
John Ilott Charitable Trust  
Kingston Sedgefield Charitable Trust  
Mercy Hospital  
Ministry of Social Development  
Nellie Milnes Charitable Trust  
Network Waitaki Ltd  
NZ Lottery Grants Board  
Otago Community Trust  
Otago Masonic Charitable Trust  
Patricia France Charitable Trust  
Perpetual Trust  
Presbyterian Church Property Trustees  
Ross Memorial Fund  
Sky City Queenstown Casino Charitable Trust  
Southern Victorian Charitable Trust  
St Joan's Charitable Trust  
The Lion Foundation  
The Tindall Foundation  
The Trusts Community Foundation  
Timothy Blair Trust  
William Downie Stewart Charitable Trust  
Z Energy Trust

## GIFTS-IN-KIND

Blue Water Products Ltd  
Campbell's Butchery  
Cubro  
Ebos Healthcare  
Fonterra New Zealand  
Foodshare

MediaWorks  
Otago Daily Times  
Otago Furniture  
Packaging Plus Cleaning  
Packaging House  
Quality Bakers  
South City Print  
Stephen Duff Motors  
T&D Marketing  
Trents Foodstuffs  
Waitaki District Council  
Watties

## BEQUESTS

Ken Robertson  
James Scoular  
B M Nelson  
R H Clark  
A L Fitzgerald  
E Marshall  
H Muller  
A P Muller  
A Jardine  
J Lauder  
Johnstone Trust

## LIFE MEMBERS

Gerry Gillespie - 1995  
Huntly Skinner (d) - 1995  
Jean Ballard (d) - 1995  
Alex Luke (d) - 1995  
Keith McCaw (d) - 1996  
Ian Tough - 1997  
Angus Black (d) - 1997  
Frances McNamara (d) - 1998  
Colin Fitzpatrick - 2001  
Royden Somerville QC - 2001  
Isobel van Royen - 2001  
Betty Simpson - 2002  
Phyllis Varcoe - 2002  
Jean Begg - 2006  
Huia Ockwell - 2006  
Ken Irwin - 2006  
Ruth Houghton - 2008  
Peter Callachor - 2008



# DIRECTORY

## DUNEDIN

Presbyterian Support Otago Support Centre  
407 Moray Place Ph 03 477 7115  
PO Box 374 Fax 03 479 2020  
Dunedin 9054  
www.psotago.org.nz  
Email: enquiries@psotago.org.nz

### FAMILY WORKS

Buddy Programme 03 477 7116  
(Dunedin, Taieri & Palmerston)  
Social Work, Budget Advice & Counselling 03 477 7116  
Food Bank & Welfare Assistance 03 477 7116  
Stepping Stones 03 470 0815  
Total Money Management 03 477 7116  
YouthGrow 03 473 1334

### SERVICES FOR OLDER PEOPLE

Enliven Family Carers 03 477 7115  
Enliven Individualised Funding 03 477 7115  
Enliven Visiting Volunteers 03 477 7115  
Enliven Maybank Activity Group 03 473 0890  
Ross Home, NEV 03 473 0029  
St Andrews, Kew 03 455 4396  
Taieri Court, Mosgiel 03 489 6044

### RETAIL

Shop on Carroll, 10 Carroll Street 03 471 8249  
Shop on Taieri, 135 Gordon Road, Mosgiel 03 489 1351  
The OpShop on St Andrew, 59-61 St Andrew Street 03 477 5019  
Ross Café, 360 North Road, NEV 03 473 0029  
YouthGrow Garden Centre 03 473 1334

## CENTRAL OTAGO

Buddy Programme, Alexandra area 0508 283 236  
Buddy Programme, Wanaka 0508 399 2625  
Family Works Social Worker, Alexandra 0508 392 5392  
Family Works Social Worker, Wanaka 0508 399 2625  
Elmslie House, Wanaka 03 443 7899  
Enliven HomeShare 03 448 8280  
Club Enliven Activity Group 03 448 8280  
Ranui Home & Ranui Court, Alexandra 03 448 8280  
Wanaka Retirement Village Manager 03 443 7899

## NORTH OTAGO

Buddy Programme 03 437 1156  
Family Works Social Worker 0508 396 267  
Columba Court Manager 03 437 1870  
Iona, Oamaru 03 437 1870

## SOUTH OTAGO

Buddy Programme South & West Otago 027 311 0069  
Holmdene, Balclutha 03 418 1468  
Milton Cottages 03 477 7115



Eveline Church harvest festival benefits Family Works clients in Oamaru.





[WWW.PSOTAGO.ORG.NZ](http://WWW.PSOTAGO.ORG.NZ)  
[WWW.OTAGO.FAMILYWORKS.ORG.NZ](http://WWW.OTAGO.FAMILYWORKS.ORG.NZ)  
[WWW.OTAGO.ENLIVEN.ORG.NZ](http://WWW.OTAGO.ENLIVEN.ORG.NZ)  
[WWW.WANAKA-RETIREMENT-VILLAGE.CO.NZ](http://WWW.WANAKA-RETIREMENT-VILLAGE.CO.NZ)



*Presbyterian  
Support  
Otago*