



Annual Report for the National Director

AGM Thursday 24 August 2017

Kia Ora Koutou,

My journey with The Personal Advocacy Trust started in March of 2016 when I commenced work in the capacity of an Administrative Assistance alongside then Manager Phil Burt. At that time the Trust was undergoing major organisational restructure, having thanked and farewelled a team of volunteers over 100 strong and recently welcomed a small team of Advocates employed around the country. The Trust owes great debt to those who worked throughout 2015 and 2016 to help the Trust transition to this point; Jan Dowland, Sue Kobar, Lyn Dawson and our own Trustee Board.

Following Phil Burt's departure in late 2016, I commenced work as the Acting National Manager of the Trust, a role which was formalised in June 2017 when I accepted the position of National Director. In the last 18 months the Trust has continued to build upon this foundation to further strengthen its position and ability to advocate for its members for decades to come.

Technology and Communication Projects

Updating the Trust's technological systems and approaches to harness modern efficiencies and workflows has been a major project and emphasis. Prior the tools of the trade had been a pen and paper; The Trust had held duplicate copies of paper files (in the field with Advocates and centralised at National Office) spanning the entire 50 years of the Trust's lifetime. In April 2016 Advocates were alternatively equipped with tablets and smartphones, utilising electronic record keeping and cloud based data storage. This technological revolution was furthered in late 2016 with the launch of our custom built database and comprehensive case management system, affectionately known as "Te Kete".

Te Kete allows Advocates to access all information and advocacy notes for individuals through a secure internet connection from any location in the world. Te Kete additionally allows for robust reporting and accountability measures, and is an evolving system that will continue to grow and adapt as new technological advancements and Trust circumstances demand.

A more recent component of this IT project has been the scanning and uploading of historical paper files in to Te Kete and the cloud. The completion of this scanning work also resulted in the closure of a physical National office space. As National Director I now work from a home office, as do all staff around the Country.

Reopening of Membership

During the period of restructure of 2015 and 2016, The Personal Advocacy Trust closed its membership and was not taking new enrolments. Much work has been done to understand and tailor the service that we deliver to become sustainable in to perpetuity, including the commission of an Actuarial review in 2016 that assisted in identifying a graduated fee scale based on the applicant's age. Thus informed, the Trust reopened membership on 1 April 2017. To date there have been several tentative and confirmed new enrolments, and we are planning for a future trajectory of growth.

Advocacy Delivery

The past 18 months have seen many advocacy successes, ranging from simple everyday achievements to major life changing triumphs. These include the reclamation of many thousands of dollars for a member whose funds had been unjustly withheld from her, recognising unsuitable

residential accommodation and services for a member and assisting in the transition to better facilities, collaborating with other stakeholders to ensure a member received appropriate urgent and serious medical assistance, and supporting a member to raise an issue with their local city council regarding public wheelchair access.

Many thanks are due to our legal counsel John Hanning, who has worked with the Trust and its members towards successful advocacy outcomes since the Trust's inception in 1967. John Hanning's work and influence is woven throughout the fabric of the Trust's history, and many a member lead happier lives because of his involvement.

I would also like to take this opportunity to thank our Team of Advocates who are champions for and in behalf of our membership, who work tirelessly to help our members achieve the best possible outcomes in life they can. Thank you to Kaeti Rigarlsford, Sally Hartley, Rachael Hindrup, Melanie Douds, Jennifer Shaw, Lynne King, Patrick Doherty, Marion Bayley, and Wayne Winder. Thanks also to previous staff members Pauline Harris and Nicola Dick, and newly appointed Advocate Wendy Rattray.

Disability Sector Connection Projects

The Personal Advocacy Trust has also begun the project of initiating conversations and relationships with other like-minded organisations working within the disability sector. In addition to the connections being built at a regional level, I have attended consultation forums on the 2016-2026 Disability Strategy and System Transformation, and have had an article published in Parent to Parent magazine. This continues to be an area with much more work to do.

Finances

In 2016 in lieu of a full audit BDO Chartered Accounts issued a Disclaimer of Opinion and Report to the Board. The 2017 financial year statements have now been fully audited by BDO, and are presented at this AGM.

2016 also saw a shift in the way the Trust manages its capital investments. For many years the Trust has benefited from the financial acumen of its Board Trustees in the management of its investments. Investments now have been transferred to Harbour Asset Management, and continue to enjoy healthy growth.

Thank you to Les Buttimore for overseeing the Trust's financial statements.

What's Next

The Trust continues to meet the need in New Zealand for advocacy that is proactive and completely independent and unaffiliated with external parties. Our strategic discussions have identified offering pay-for-service advocacy in the future is a priority, in addition to the current model of membership and enrolment advocacy.

We will also look to help our membership and their families navigate the many changes being implemented throughout the landscape of disability service provision and recognition in New Zealand. This is an exciting time of opportunity with a bright future for New Zealanders living with disability.

Erika Butters
National Director
The Personal Advocacy Trust