



Annual Report for the National Director

AGM Thursday 28 June 2018

Kia Ora Koutou,

It has been a pleasure and a privilege to be involved in the work of The Personal Advocacy Trust for another year. The year ending 31 March 2018 was one that continued the Trust's trajectory of steady and progressive development and growth.

Technology and Communication

Our custom-built database called "Te Kete" continues to serve the Trust well. By gathering and storing our advocacy information electronically, we are able to capture valuable data around who we are advocating for, when that advocacy is happening, how it is delivered, and what issues are being confronted.

For the coming year we are also hoping to gather similar information directly from our members, their family and support workers. A Survey was recently distributed across the country that we hope will inform us of how our advocacy service is perceived, and in turn, how we might improve and enhance our service delivery.

An organisation and country wide Trust newsletter was also issued for the first time in February of 2018. This was well received and is anticipated to be issued bi-annually.

Advocacy Training and Professional Development

This year staff have had the opportunity to engage in online Professional Development through Open Future Learning, a training platform developed specifically for the developmental disability workforce. A video suite of training resources and modules are available to Advocates, and feedback has been positive.

Alongside this digital learning we have successfully hosted training and development conferences for our Advocates with presentations by disability lawyers, disability information and advisory services, Needs Assessment and Coordination services, Parent to Parent, Work and Income, and the Enabling Good Lives and System Transformation team. We are grateful for the high level of engagement from staff and other agencies, and are committed to continued delivery of quality training opportunities.

Reopening of Membership and Introduction of Fee-for-Service Work

Since reopening membership on 1 April 2017, the Trust has had modest new enrolments, and it is anticipated several more prospective members will finalise their arrangements for enrolment within the next few months. Despite this, our overall membership numbers are decreasing as the demographic we serve are aging. The Trust is working to address this by engaging directly with families of younger prospective members, notably at the upcoming Disability Connect Transition Expo hosted in Auckland.

In the year ending 31 March 2018 the Trust also took the step to extend service provision in a Fee-for-Service format to individuals who are not enrolled members of the Trust, or who would like advocacy support above and in addition to their membership entitlements. This service stream has had a promising start, with short term contracts to date being arranged by Service Providers and family members. It is anticipated that there will be continued and significant growth to our Fee-for-Service work.

Advocacy Delivery and Trust Administration

Advocacy continues to be a vital need in our communities, and the past year has brought many opportunities for our Advocates to work alongside our members to enhance their human rights and wellbeing. In many cases Advocates have worked in conjunction with extended family to accomplish this. Unfortunately, at other times Advocates have worked to protect members from extended family who have exerted unwelcome and abusive influence. The past year has also highlighted the value of advocacy in assisting across the intersection between disability, mental health and age-related health concerns.

Through its administration of Discretionary Trust funds on behalf of some of its members, the Trust has also been empowered to effect meaningful change and improvement for these members. In 2017 and 2018 Discretionary Trusts have been used to fund furniture, holidays, dental and medical bills, and the employment of an Activities Companion, among other things. The Personal Advocacy Trust is proud of its Discretionary Trust administration work, and will actively seek to grow this service in coming years.

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 Rigarsford, Sally Hartley, Jennifer Shaw, Gail Bingham, Wendy Rattray, Lynne King, Patrick Doherty, Marion Bayley, and Wayne Winder. Thanks also to previous and outgoing staff members Rachael Hindrup and Melanie Douds.

For much of the last year, Wayne Winder also worked alongside me as a Team Leader for the Central and Southern contingent of our Advocates. I am grateful to him for his valuable contributions and work. As the Trust grows and to enable us to better access future opportunities, we have recruited for and will be appointing an Administrator and national Team Leader.

Disability Sector Connection Projects

The past year has seen The Personal Advocacy Trust join the ranks of The New Zealand Disability Support Network. This has led to PAT participation in National and Regional forums, including regarding the launch of the Employment Support Practice Guidelines, workforce development and qualifications, and transitioning to an environment of personalised budgets.

NZDSN membership has also heralded increased exposure and networking opportunities at both regional and National levels. These contacts have in turn led to Fee-for-Service contract work commissioned by providers and fellow members of NZDSN. PAT has also recently met and presented to representatives from the Federation of New Zealand Disability Information Centres.

Looking forward The Personal Advocacy Trust are optimistic about future collaborative working relationships with SAFA (Safeguarding adults from abuse), Oranga Tamariki, Special Olympics, IHC Advocacy, and the Ministry of Health in the Enabling Good Lives context.

Strategic Plan Development

In March of this year, The Personal Advocacy Trust was very fortunate to have worked with Jan Dowland in the development of a Strategic Plan to guide the next several years. This identifies several key strategic priorities, such as diversifying the service, strengthening internal capacity, promoting and marketing our services, and strengthening relationships with other stakeholders.

Work has already commenced on realising this plan, with several immediate tasks already underway and near completion.

Finances

In the financial year ending March 2018 the Trust introduced a Pre Support subscription. This was an optional donation for all previously enrolled members who had already paid their Full Support

enrolment fee, but a compulsory payment for all new members or previously enrolled members who had not paid their Full Support enrolment fees. Thank you to all who have paid this subscription. As it is an annual donation or payment, invoices for the Year Ending 2019 Pre Support subscription will be issued shortly.

The Trust closed the year in a stronger financial position than the previous year, with a surplus of \$18,438. Thank you to our accountant Les Buttimore and our auditors BDO for their work in overseeing the Trust's financial statements.

What's Next

The Trust has many opportunities in the months and years ahead through which it hopes to extend its reach to more New Zealanders in need of advocacy. Some of these opportunities will be regional while some others may be in a nation-wide context. All opportunities leave me with great anticipation for this time next year when writing my report for the 2019 AGM.

Thank you to our tremendous Trust Board who work as volunteers to govern our organisation. In particular, I would like to thank Barney Cooper who has been instrumental in her leadership and of great personal assistance in mentoring me. Barney's service across the sector was also recognised earlier this year through her receipt of an NZDSN Life Membership award.

And thank you to our membership and their families across the country for your continued and ongoing support.

Nga Manaakitanga,



Erika Butters
National Director
The Personal Advocacy Trust