



October 1

# Emerge Annual Report

# 2012

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*Emerge will facilitate the employment and training of people with disabilities in non-segregated settings by providing a range of high quality supported employment and transition services that promote choice and individual empowerment.*

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## Our Vision

A supported employment and transition agency that achieves meaningful, equitable and long-term employment outcomes for people with disabilities, particularly those who are currently poorly served or excluded from work and education/training support services.

A supported employment agency and transition service that works for its local community.

An organisation that is widely respected for its integrity and creative ability to develop and deliver supported employment and transition services.

An organisation that is committed to providing a high quality, highly valued service to all those who use Emerge services.

To provide information about effective and creative practice in the field of supported employment and transition programmes.

## Statement on Service Provision

Emerge is a Charitable Trust that provides a range of professional supported employment and transition services for people with disabilities in Wellington.

Emerge provides the support that the job seeker and employer requires, before, during and after job placement.

This is to ensure successful long-term employment outcomes for people with disabilities in the regular workforce.

Emerge is committed to providing a quality service that assists people with disabilities into mainstream employment opportunities

## Board of Trustees October 2012

<b>Chairman</b>	Chris Lipscombe	<b>Deputy Chair</b>		
<b>Treasurer</b>	Gordon Smart			
<b>Trustees:</b>	Maree Bregman, Hina Short,	Janet Dixon, Lesley Shanahan	Paula, Hine	Jo Maling
<b>Secretary</b>	Susan Finlay			

## Emerge Staff 2012

<b>Operations Manager</b>	Linda Fisher	<b>Business Manager</b>	Susan Finlay
<b>2IC &amp; Employment Consultant</b>			Kellyanne Tong
<b>Employment Consultants</b>			Elizabeth Ellis, Cecilia Kumar
<b>Transition Coordinator</b>			Susan Wilson
<b>Transition &amp; Employment Consultant</b>	Jo Lucre		

## Agenda for AGM 2012

*Monday, 1<sup>st</sup> October at 5.30pm,  
Boardroom, Level 3, 203-209 Willis Street, Wellington*

1. Welcome and Apologies for Absence
2. Minutes of Previous AGM
3. Chairperson's Report
4. Treasurer's Report, Financial Position and Annual Accounts
5. Managers' and Staff Report
6. Appointment of Trustees
7. Other Business
  - Amendments to Constitution and Mission Statement
  - Adoption of Maori name

## Minutes AGM 7th November 2011

Held at Level 4, 203 Willis Street, Wellington

### Meeting opened at 6pm.

**Present,** Janet Dixon, Jason Doughty, Elizabeth Ellis, Sue Finlay, Linda Fisher, Chris Lipscombe, Kellyanne Tong, Gordon Smart, Hina Short, Maree Bregmen, Rhonda Swenson, Jo Maling

Meeting Chaired by Chris Lipscombe, with a quick round of introductions

1. **Apologies:** Peter Ledingham, Lesley Shanahan, Jo Lucre

2. **Minutes of last Meeting**

The minutes were confirmed as a true and correct record

**Moved** Gordon. Seconded: Janet. All in favour. Carried

**Matters Arising:** No matters arising from the previous minutes.

3. **Chairperson's Report read by Chris Lipscombe.**

**Chris** read his report which reviewed the last 12 months and began with thanks to the Managers, staff, trustees and employers.

Chris also reviewed the year of governance activities, planning, policy as well as looking forward to the year ahead especially organisation and transition. .

Chris moved that the Chairperson's report be accepted, seconded Jo Maling. All in favour. Carried.

4. **Emerge Team Service Report**

The service report was completed by the Emerge team.

**Suse Wilson** read the transition report, Elizabeth Ellis read the Supported employment report, Jason read out the report on the Focus Group, Kellyanne Tong reported on our marketing activities and Wellington Women's Refuge pilot, followed by Linda and Sue who outlined some of the successes and challenges of the year.

Comments following the reports:

Rhonda clarified wording in the SE report i.e. public versus government funding, and clarified that the Mainstream funding was now being piloted in Auckland and is available to private employers.

**Kellyanne** asked if the AGM report could be put onto the website.

Janet was impressed at how Kellyanne always makes room in her day to take on more work.

**Linda** reflected on how the AGM report can help us recognise what good work we do, and said what a privilege it was to meet so many amazing people and amazing stories in the course of our jobs.

Chris thanked all for a comprehensive and interesting review of the year.

Janet commented – 11 years ago we had a dream.

Chris moved that the managers' and team reports be accepted, seconded Hina. All in favour. Carried.

5. **Treasurer's Report:**

**Gordon Smart** read and tabled a financial report. He thanked KPMG for supporting us through their free audit service.

Gordon remarked that we had received another unqualified audit report. Emerge had another good year, and was in a favourable position going forward. We have the resources to complete our SE and Transition contracts. With our contract delivery expectations at the same level, this will provide a challenge to our financial buffer, and we would expect that our surplus will reduce over the next year.

Gordon Smart, moved that the Treasurer's report be accepted, seconded Maree. All in favour. Carried

9. **Any other business**

**Sue** thanked Gordon for his continued support as Treasurer. Chris noted that Trustees appointments were made last year for two years so there was no need to confirm them at this meeting.

### AGM Meeting Closed at 6.52 pm

## Chairman's Report by Chris Lipscombe



Good evening, and welcome to Emerge's Annual General Meeting for 2012.

In my report to last year's AGM, I began by referencing the tough year we had been through, with staff changes, uncertainty around funding, and the need to upgrade or replace much of our technology support structures. I'm pleased to be able to acknowledge over the past year – on these measures at least – Emerge is in better shape. Fewer staff changes, more certainty around funding (being in the middle of our two year MSD contract), and the introduction of new mobile, desktop and server tools and technologies have all been achieved in what has continued to be a challenging political and economic climate.

And in this tough political and economic climate, Emerge has continued to place clients, and provide satisfying and life-enriching experiences for those with experience of disability. By the end of the financial year we were achieving 103% of our MSD target of 70 placements of over five hours per week. Congratulations to our managers and staff for this tremendous achievement.

Over the past twelve months the Board has continued to change and develop, both in its composition and its focus. The emphasis on policy development and sharpening our governance practice has continued, with significant effort going into HR policy development by Trustee Hina Short, and into the development of Board capability by Business Manager and Board Secretary Susan Finlay.

Many of our activities over the past year have already been covered in managers' reports. At a more strategic level, I'd like to talk about the moves we've made to expand Emerge's relationships, capability and strategic direction.

### *Profile-building*

Building on the launch of the Emerge website last year, we now have a number of vehicles for telling our stories to clients, families, employers, and funders. Our Operations Manager Linda Fisher and 2-i-C Kellyanne Tong have continued to develop and distribute success stories about our clients and employers,

appearing on the website and in regular Emerge newsletters. Emerge once again played a pivotal role in this year's Transition Expo, and will continue to develop innovative ways to engage with existing and prospective clients in their families – for example, Transition Whanau Circles, entering their second year of operation with support from J R McKenzie Trust.

It is a personal source of frustration to me that the expertise represented within Emerge is not more widely recognised outside the immediate circles where we work. This is particularly galling when we see "new" government initiatives on disability attracting publicity and funding, whilst the level of funding we receive from MSD has remained unchanged for twelve years. Despite our best efforts – for example, our work with Wellington Employers' Chamber of Commerce and Southern Cross – we obviously still have some way to go to establish our credentials in the wider community.

### *Capability-building*

As signalled in my AGM report last year, the renewal of our contract with MSD gave us eighteen months to ensure that we were seen to be effective in our areas of work, efficient in the way that we handle and make use of the funding we receive, and essential to our key stakeholders in meeting their organisational objectives. I had asked Thought Partners to work with our managers to test and refine Emerge's structure, roles and responsibilities, in order to meet these goals.

Feedback from managers through their annual appraisals seems to have demonstrated the value of this approach, especially in clarifying areas of personal accountability and measures of success. In the six months that remain before our MSD contract once again comes up for renegotiation, we have a window of opportunity to extend the exercise with Thought Partners to the rest of the organisation, ensuring that we are in the best possible shape to deliver on our existing plans and strategies, and to achieve our strategic goals.

### *Goal-setting*

Last year we were working towards some big audacious goals for Transition, but the financial support required to make this a reality has been difficult to obtain. Initial conversations with Todd Foundation have advanced to a point where we now have a proposal short-listed for consideration. A successful conclusion to this funding bid may still allow us to support some more modest objectives in the area of transition, including increased staffing.

### *Strategic Planning 2012*

Thanks to Kirsty Ferguson who facilitated our strategic planning session held with Board members, client focus group members and staff on Monday 3rd September. I look forward the final results of this exercise, and in particular how it will enable us to refine our objectives for transition and supported employment.



### *Changes to the Board of Trustees*

During the year we have welcomed **Paula Hine** onto the Board as a Trustee. Paula has performed a sterling job of supporting our Business Manager in the preparation of monthly financial statements and KPI reports. Our Treasurer Gordon Smart has been unable to contribute as much time as previously to this work, owing to family and study commitments. This year Gordon has indicated that he is prepared to stay on as Treasurer of Emerge, but not as a Board member. This external role is permitted by our Constitution and I'm delighted that Gordon has agreed to continue his work with Emerge under this new arrangement. I hope the AGM will confirm Gordon in this redefined role.

I also have the sad task of farewelling **Peter Ledingham**, who has decided that he can no longer continue his role as a Trustee of Emerge. I'm sure I am not the only one who has appreciated Peter's deep experience and wise counsel, both inside and outside of Board meetings. On behalf of the Board I'd like to wish Peter well, and thank him for his service.

I have now completed two terms as Chair of Emerge and would be happy to take on a third term, if you'll have me. I would however like to signal that this will be my last term as Chair. Given my shift to full-time work in Porirua it has become more difficult for me to give managers the support they rightfully expect from the Chair. I am also a firm believer in the law of diminishing returns. The longer I hold this position, the less change I will be able to effect. I look forward to the next 12 months with Emerge, and in working with you to identify a new Chair by this time next year. *Thank you.*

### *Treasurers Report 2012 by Gordon Smart*

Total income for 2012 was \$11k lower than last year (2012 \$369k versus 2011 \$380).

- MSD income was \$7k lower due to lower than budgeted transition income.
- Donations were \$3k higher as funding was sought for capital expenditure for a database and a new phone system.
- Interest income was \$3k higher.
- Other income was \$3k lower as there was no Transition Expo Coordination contract this year.

Total 2012 Expenditure was \$8k lower than last year (2012 \$351k versus 2011 \$359k). The decrease was mainly due to the drop in rental expenses as possible rent increases had been accrued in the previous year.

Emerge reported a surplus for the year of \$17k (2011 \$21k surplus) which was ahead of budget (\$18k deficit). The net result increases the accumulated funds from \$160k to \$177k.

The Trust remains in a positive net asset position and has the resources to complete its (combined) Supported Employment and Transition Contract (to 30 June 2013). Government capping of funding levels funding levels will put pressure on the organisation to maintain its current financial buffer in the face of rising costs.

## Independent Auditors Report



### Independent auditor's report

#### To the readers of the financial statements of Emerge Supported Employment Trust

We have audited the accompanying financial statements of Emerge Supported Employment Trust ("the trust") on pages 2 to 7. The financial statements comprise the statement of financial position as at 31 March 2012, the statements of financial performance and movements in accumulated funds for the year then ended, and a summary of significant accounting policies and other explanatory information.

#### Board of Trustees' responsibility for the financial statements

The Board of Trustees is responsible for the preparation and fair presentation of financial statements in accordance with generally accepted accounting practice in New Zealand, and for such internal control as the trustees determines is necessary to enable the preparation of financial statements that are free from material misstatement whether due to fraud or error.

#### Auditor's responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with International Standards on Auditing (New Zealand). Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgement, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the trust's preparation of the financial statements that give a true and fair view of the matters to which they relate in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the trust's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates, as well as evaluating the presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Other than in our capacity as auditors we have no relationship with, or interests in, the trust.

#### Opinion

In our opinion the financial statements on pages 2 to 7 present fairly, in all material respects, the financial position of the trust as at 31 March 2012 and of its financial performance for the year then ended, in accordance with generally accepted accounting practice in New Zealand.

6 September 2012  
Wellington

## Audited Accounts 2012

### Emerge Supported Employment Trust Statement of Financial Performance For the year ended 31 March 2012

	31-Mar-12	31-Mar-11
Note	\$	\$
<b>Income</b>		
Department of Work and Income	294,044	301,156
Donations & Subsidies	4 60,941	58,687
Interest Income	7,825	11,393
Other	6,677	9,405
<b>Total Income</b>	<b>369,487</b>	<b>380,641</b>
<b>Expenditure</b>		
Administration	27,633	31,331
Depreciation	5,657	3,262
Payroll Expense	292,601	293,671
Rental Expense	25,717	31,025
<b>Total Expenditure</b>	<b>351,608</b>	<b>359,289</b>
<b>Net Surplus for the year</b>	<b>17,879</b>	<b>21,352</b>

The attached notes form part of, and should be read in conjunction with, these financial statements.





## Audited Accounts 2012 (Cont)

### Emerge Supported Employment Trust Statement of Movements in Accumulated Funds For the year ended 31 March 2012

	31-Mar-12	31-Mar-11
	\$	\$
Equity at Beginning of year	159,643	138,291
Add Net Surplus for the year	17,879	21,352
Equity at End of year	<u>177,522</u>	<u>159,643</u>

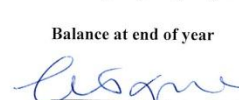
The attached notes form part of, and should be read in conjunction with, these financial statements.

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### Emerge Supported Employment Trust Statement of Financial Position As at 31 March 2012

	31-Mar-12	31-Mar-11
Note	\$	\$
<b>Current Assets</b>		
Petty Cash	300	300
National Bank Call Account	9,288	12,507
National Bank Current Account	33,467	40,638
National Bank Term Investments	150,000	130,000
GST Receivable	1,561	1,789
Accounts Receivable	847	-
<b>Total Current Assets</b>	<u>195,463</u>	<u>185,234</u>
<b>Fixed Assets</b>	<u>2</u> 12,765	<u>11,316</u>
<b>Total Assets</b>	<u>208,228</u>	<u>196,550</u>
<b>Current Liabilities</b>		
Accounts Payable and Accruals	26,387	33,109
PAYE Tax Payable	4,319	3,798
<b>Total Current Liabilities</b>	<u>30,706</u>	<u>36,907</u>
<b>Net Assets</b>	<u>177,522</u>	<u>159,643</u>
<b>Accumulated Funds</b>		
Balance at beginning of year	159,643	138,291
Net Surplus/(Loss) for year	17,879	21,352
<b>Balance at end of year</b>	<u>177,522</u>	<u>159,643</u>

  
Chris Lipscombe Chairman  
Date 6 September 2012

  
Gordon Smart Trustee  
Date 6 September 2012

The attached notes form part of, and should be read in conjunction with, these financial statements.

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## Audited Accounts 2012 (Cont)

### Emerge Supported Employment Trust Notes to the Financial Statements For the year ended 31 March 2012

#### 1. Statement of Accounting Policies

##### Reporting Entity

Emerge Supported Employment Trust ('the Trust') is a registered trust under the Charitable Trusts Act 1957.

Emerge Supported Employment Trust is a not for profit organisation that provides a range of supported employment services for people with disabilities seeking employment in the Wellington region.

The financial statements comprise statements of the following: financial performance; movements in accumulated funds; financial position; accounting policies; as well as the notes to these financial statements.

The financial statements of the Trust have been prepared according to generally accepted accounting practice in New Zealand as defined by the Financial Reporting Act 1993.

The financial statements have been prepared on the basis of historical cost. All accounting policies have been applied consistently by the Trust.

##### Adoption of International Financial Reporting Standards (IFRS)

In September 2007, the Accounting Standards Review Board announced the delay of the mandatory adoption of NZ IFRS for certain entities. The Trust satisfies the deferral criteria and has therefore decided to delay the adoption of the IFRS standards.

##### Specific Accounting Policies

The following specific policies which materially affect the measurement of financial performance and financial position have been applied:

##### Goods and Services Tax

The financial statements have been prepared on a GST exclusive basis, except for payables and receivables which are stated inclusive of GST.

##### Taxation

The Trust has been registered as a Charitable Trust and is therefore exempt from income tax under the income tax legislation.

#### Differential Reporting

The Trust qualifies for differential reporting as it has no public accountability and it complies with size criteria. The Trust has taken advantage of all available differential reporting exemptions.

#### Income

Income is recognized on an accrual basis, except for income from donations and subsidies which is recognized on a cash basis in the year it is deposited to the bank account. At balance date there was no donation or subsidy income received that had not been deposited to the bank account.

#### Fixed Assets

The cost of purchased fixed assets is the value of the consideration given up to acquire the assets and the value of other directly attributable costs incurred in bringing the assets to the location and condition necessary for their intended use.

#### Depreciation

Depreciation is calculated on a straight line basis to allocate the cost of an asset, less any residual value, over its useful life.

##### Depreciation Rates

Computer	33%
Furniture and Fittings	20%

#### Change in Accounting Policies

There have been no changes in accounting policies. All policies have been applied on bases consistent with those used in previous years.

#### 2. Fixed Assets

Fixed Assets comprise of the following:

	Cost	Current Depreciation	Accumulated Depreciation	Carrying Value
<b>2012</b>				
Computer	66,046	4,797	58,018	8,028
Furniture & Fittings	19,097	860	14,360	4,737
	85,143	5,657	72,378	12,765
<b>2011</b>				
Computer	63,627	2,759	53,221	10,406
Furniture & Fittings	14,410	502	13,500	910
	78,037	3,261	66,721	11,316



## Audited Accounts 2012 (Cont)

### 3. Commitments and Contingencies

There were no known commitments and contingencies at 31 March 2012 (2011:nil).

### 4. Donations and Subsidies (Excluding GST)

	2012	2011
Anonymous	7,337	\$7,418
ANZ Staff Foundation	-	\$7,028
Community Grants Foundation (COGS)	5,000	\$3,000
Guardian McLachlan	-	\$6,957
Guardian – JR Lewis	-	\$2,174
Guardian- Ferrier Trust	4,000	-
JR McKenzie Trust	5,000	-
Lion Foundation	2,000	\$2,222
Lotteries	5,000	\$3,000
NZ Federation of Vocational & Support Services	3,384	\$666
Payroll Giving	720	-
Pub Charity	2,000	-
Southern Trust	2,000	\$2,222
Springhill & Frimley	10,000	\$10,000
TG McCarthy Trust	3,000	\$4,000
Wellington Methodist Trust	1,500	-
Winton and Margaret Bear Trust	10,000	\$10,000
<b>Total</b>	<b>60,941</b>	<b>\$58,687</b>
KPMG	Honorary Audit Fees	
NZ Post Office	300 free envelopes	

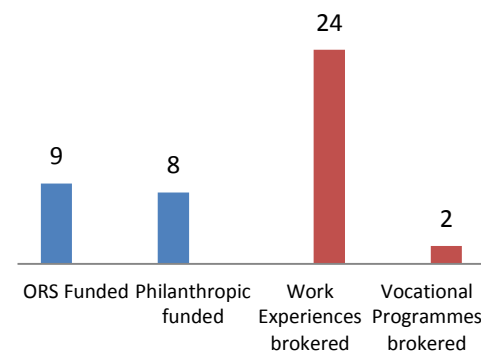
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## Emerge Services - Team Report Transition 2012, by Suse Wilson

2012 has disappeared very quickly indeed. Those who have been with EmERGE Transition Services (from Wellington Central and Porirua) have some clearer ideas about where to and they are now determining options they wish to pursue.

### Transition Programme Stats 2012



Students enrolled on the programme come from the Wellington and Porirua regions.

The following comments have been taken from work experience provider reviews, student reviews and school/ whānau feedback throughout the year. This feedback is a good indication of the continued need and benefits of EmERGE's Transition service.

*"We are certainly very appreciative of all you are planning to do. For the first time in quite a while I feel more confident that we are offering V. something which will go a long way to meeting his needs."* Parent.

*"As I've said before you have been amazing to work with, the best ever."* – HOD Learning Support

*"EmERGE has been great to work with both times that we have had work experience students in. Our contacts are helpful and supportive when needed"*

*but also allow the students room to settle in and get work done with some independence.” – Work Experience Provider*

*“Having students from Emerge and assisting them with work experience has been a very satisfying and rewarding experience. J. has proved himself to be fully capable of the tasks given and is a very cheerful and happy worker” – Work Experience Provider*

*“I get to do something that I really enjoy doing and that is helping people” – Transition participant.*

### Whānau Circles



The Transition team has now run three whānau circles in the Northern suburbs for whānau who have young people attending Mana, Aotea, Mahinawa, Newlands and Onslow Colleges. Numbers at each meeting have been between 10-20 people.

The first meeting looked at what it was whānau wanted to get out of the group and how we might implement this. The group determined that they would like to hear from speakers regarding living options beyond home so we invited Community Connections to speak about Supported Living at the following meeting. The next group query was about Enduring Power of Attorney and Family Trusts so we invited Whitireia Community Law to talk to the group.

The remaining meeting in 2012 will be an opportunity to feed back on how people think the whānau circle has gone so far and look at future direction. This group will also act as a model for other whānau circles to be rolled out in Central and Southern Wellington.

### Transition Expo 2012

Suse spent around 60 hours involved in the organising for the 2012 Exploring Futures and Beyond booklet alongside six other service providers (Idea services, Hutt Valley Disabled Resources Trust, Ace House, Q-Nique, CCS Disability Action and the Ministry of Education).

At the Expo the Emerge stall was very busy. We talked to many young people (and whānau) already in their last year of school who had not engaged with a transition provider and many whānau interested in Emerge's transition service.



Many people were keen to sign up for:-

Emerge Newsletter

The Ministry of Education Transition Listserv

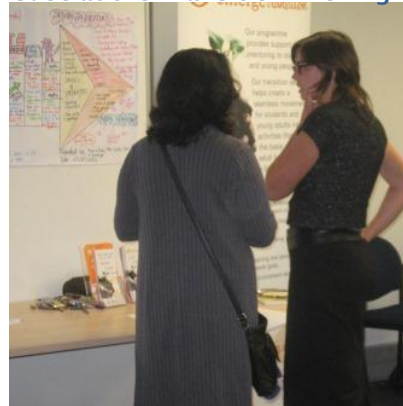
Updates about the Whānau Circles.

### Presentations

We had the opportunity to speak at the New Zealand Disability Support Network (NZDSN) conference – “Light the Fire on Inclusion” earlier this year. We discussed the Supported Employment and Transition services that Emerge provides and were followed by Scott Bregmen from Weltec who spoke about the Community and Vocational Learning Skills programme.

The Transition team also spoke at an NZDSN forum on “Transitioning” where we work shopped some of the challenges for Transition providers and some of the solutions and initiatives that could be undertaken in future

### Suse at the Transition Evening



Other marketing opportunities have included the Transition evening at MoE offices in the Hutt in February as well as general promotion to schools, families, young people and the community.

### To Round off the year

As we roll in to the final stage of the year the Transition team will be running 6 x 1 hour sessions for transition participants. The format will be similar to Supported Employment ‘Job Jam’. However, the focus will be on putting into practice what was learnt in their transition year around starting out towards independence and

adulthood. A guest speaker will be invited from Whitireia Community Law to speak on life skills such as budgeting and consumer awareness. We will also address such items as personal presentation, accessing and using email, texting, filling in application forms and where to gain support in order to do so. We are expecting up to 15 young people to participate.

### Supported Employment, by Jo Lucre

It has again been a busy year for supported employment with demand for supported employment services exceeding our staffing levels. We continue to meet the needs of our current clients and our future clients, where possible, while they wait for service. Such high demand is reflective that Emerge remains a vital and sought after service.

New to our supported employment team this year is Cecilia Kumar who started with us in March, she has already been instrumental in securing three new jobs in her short time at Emerge.

As part of our role as S.E consultants we rely on funding agencies to provide additional avenues for supporting our clients into work, one of which is Mainstream who have recently announced changes. On 1 July 2012, eligibility for the Mainstream Employment Programme was extended to private sector employers. For supported employment this has the potential to create a wider diversity of employment for our clients bearing in mind that the competency and integrity of Mainstream processes, along with mainstream staff will largely underpin our ability to effectively support and initiate Mainstream placements to the high standard Emerge aspires to.

In addition to including the private sector, a 16-week Mainstream Internship will be available for 15 current tertiary students to work in areas that relate to their study. Mainstream has also indicated that preference will be given to favouring those participants who are young and have recently graduated with a diploma or tertiary qualification. The impact of the new Mainstream developments will only be apparent when they have been rolled out for longer and its effectiveness or lack thereof can be determined.

It remains a challenging time for securing employment in the current economic climate with New Zealand's unemployment rate rising over this past year to 6.8 percent.

One of the key reasons attributed for this is that the Christchurch rebuild is lagging, meaning there have not been as many jobs as expected. The state of the global economy is another influencing factor. In reflection of this workplaces seem increasingly unsupportive with these economic and restructuring pressures.

Despite the above Emerge has continued to make placements and will continue to work towards employment opportunities for our clients.

### Focus Group Report by Cecilia Kumar



The Emerge Focus Group has now been running for over 18 months, its purpose being to provide feedback on service delivery to staff and board members, and be representative of Emerge service users. With the initial Terms of Reference as a base point the Focus Group is continually reflecting and reviewing its direction and progress. I believe this illustrates the commitment that the members have to being an effective voice, not just for us at Emerge to improve our performance, but in the wider disability community as well.

A typical meeting may consist of members giving feedback about conferences they had recently attended, analysing and assessing whether we are fulfilling our strategic planning aims; exploring and suggesting ways to achieve this if we are not, and discussing more general issues related to disability. Everyone is very engaged at the meetings and we all aim to create a space in which people can be free to speak their mind but with an overall purpose, and this is brilliantly facilitated by one of our board members, Jo Maling.

The Group has effectively communicated with the Board on a range of issues, such as identifying that they would like to see Emerge working on being a more approachable service to people of all cultures, one result of which was that Emerge staff undertook a very valuable Cultural Competency Training day, in addition to a number of other ideas being suggested which the Board was equally enthusiastic about undertaking.

For the first time members were invited to our Strategic Planning meeting so thank-you to Richard Humphries and Rhonda Swenson for attending and providing significant input.

The plan for 2013 is to continue to build on what the Focus Group has achieved thus far, for members to be attending more conferences and share and gain increased understanding and knowledge which can assist in improving the service Emerge provides for all users.



## Marketing Report by Kellyanne Tong

The purpose of Emerge's marketing activity is to improve/increase our brand profile within the community in particular with employers and potential supporters of Emerge. With a focus on increasing job seeker placements, work experience opportunities, funding (grants and contracts) and donations and sponsorship opportunities, we have continued to seek new and creative opportunities.

2012 has seen the steady development of Emerge's Marketing plan, although we have been challenged with limited resourcing (financial, staff time etc.) to invest in these plans we have been successful in considerably growing the subscription rate for our e-newsletter. Since the last AGM we have doubled our number of subscribers without a decrease in newsletter open rates which consistently exceeds the sectors average. We continue to explore ways of using the Newsletter to drive people to our website, and have been successful to some extent as demonstrated through click records (the number of people who have clicked on a newsletter link).

The Emerge website has continued to develop alongside the newsletter and provides the service with an excellent forum for sharing the work we do, as well as profiling our supporters and initiatives. We hope that it will become an increasingly useful tool in generating income through payroll giving and site donations.

This year we have been successful in adding to our list of Partners through the new Partnership with Southern Cross. We were selected for the Charity of the Month after I approached them about this initiative. Our Charity of the month status in August successfully generated some untagged Marketing funds. From this interaction we have been encouraged by The Cross to continue to work with them, in particular around profile building and fundraising events, which The Cross would be eager to organise with Emerge and support the success of.

Going forward we want to focus on increasing payroll giving and direct donations these untagged funding sources supports Emerge to work independently of other funding sources. We would also like to develop a plan for fundraising and profile raising events.

## Operations Manager's Report by Linda Fisher

2012 seems to be over in the blink of the eye – it seems only weeks ago since we were gathered for our last AGM. In this year, we have achieved much and

we are going to continue our tradition of all our team members contributing to the annual report.

### Our Team



We have gathered around us a great team with a mix of abilities, personalities, ages, lengths of service with the organisation (experience) – but with a shared goal and vision of an inclusive New Zealand/Aotearoa. Jason moved to another employer early in the year, and while it is always sad to see someone go, we are happy to welcome Cecilia to the team – she is proving a real asset and it feels like she has been around for much longer than her actual 6 months.

I believe we are a particularly good workplace at supporting one another and our clients – contributing to finding the best processes,

sharing our knowledge and at times sharing our workloads.

I see us moving from strength to strength as we work collaboratively as a team and our confidence in each other grows. Central of this is understanding our various roles and responsibilities, and taking responsibility for the many external relationships our organisation has – our transition team with schools, students and their whanau and work experience providers, our supported employment team with MSD, employers, allied organisations, government and non-government agencies, clients, etc. etc.

### Our Board

The staff and particularly the managers are fortunate to have a strong and supportive board comprised of able and engaged people who generously give their time to steering our ship through turbulent waters.

### The Opportunities Ahead

As the financially straightened times in which we operate become just an established fact of the world we live in (and will live in for the foreseeable future) we can easily slip into survivalist thinking as we seek ways to continue and grow our service we keep our ears open and eyes wide to anything that we can align ourselves with that resonates with our goals and philosophy – and to have this view takes discipline and effort. We do do this - we need to do this

more! – no-one is going to beat our door down and beg us to accept their commission, so we are going to have to saddle up and ride out and find them.

### *The Risks*

The risks largely remain the same from year to year, that is the possibility of the withdrawal of funding that underpins our continued existence (our short term MSD contract). This makes it difficult to confidently provide assurance of continuity to all of our stakeholders. It can also make it difficult for our service not to be shaped by our contract, thereby deforming our essential character. The fact is that we are being supported by our major funder at an annually decreasing level – i.e. the amount we are receiving has not increased since our establishment 12 years ago, whereas our costs increase yearly. However, a replacement for this income stream is not featuring largely on the horizon.

### *The Tasks Ahead*

The big task is ensuring that supported employment is recognised and valued for what it delivers and is funded accordingly. This can be done by continuing to deliver a service of great value to our clients, and that this fact is communicated directly to those that are in a position to help us to continue to do so. Our further task is that our service in particular does not remain a really well-kept secret. This can be achieved through a campaign of promotion by everybody associated with Emerge.

## **Business Manager's Report, by Susan Finlay**

It has been a busy year as we forge ahead with our strategic and business plan which is essentially to secure more funders increase the number of young people to whom we can offer transition services and to extend the geographical reach of this service. In line with this plan we have updated our phones, IT and database systems and redesigned our offices. We are ready!

### *Funding*

Emerge Transition continues to be supported by several core funders, Winton and Margaret Bear, Springhill and Frimley, TG MacCarthy Trust and JR McKenzie Trusts, COGS and Lotteries. In line with our strategic plan of expanding transition services to meet the needs of our community we have made a push this year to bring more funders on board. We have applied to 14 funders, so far 4 have declined, one grant of \$5,000 accepted and we are awaiting decisions from the remaining 9. We are hopeful!

### *Office infrastructure*

Following on from the computer and phone systems upgrade, Emerge undertook to replace our (technically unsupported) client database. We secured funding from Pub Charity for the initial purchase of the Recordbase system which is accessed through the Internet.

The design and installation process began in mid January 2012 with a roll out of date of early April. This was a huge project. We began with many hours of staff input as to how we could best use the system. Once we had decided upon the organisational design we began the process of data transfer. This was Emerge's responsibility, and it involved extracting the current data and placing it into many Excel spreadsheets preformatted by Recordbase. No high-tech programming here, just hard slog and a lot of checking for accuracy. Recordbase provided a day of user training and we went live at the end of April with few hitches and glitches.

This year we have also renegotiated more favourable lease terms and renovated the office space to provide more usable and private meeting/training rooms for our clients. The physical renovations began in late June and were completed by the end of July.



**Our old furniture**

We are very grateful to The Lion Foundation and The Southern Trust for provision of funds to replace our very aged furniture.

The whole result is spectacular!

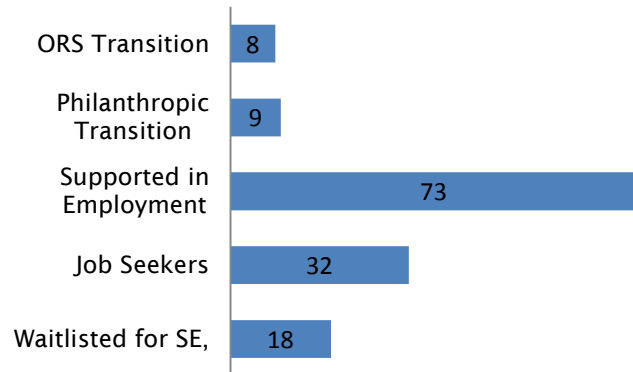
**Boardroom with new furniture**



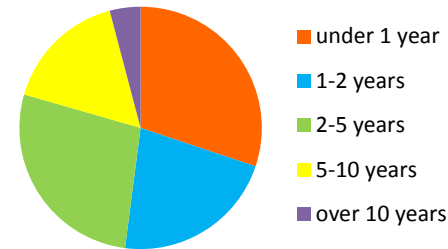
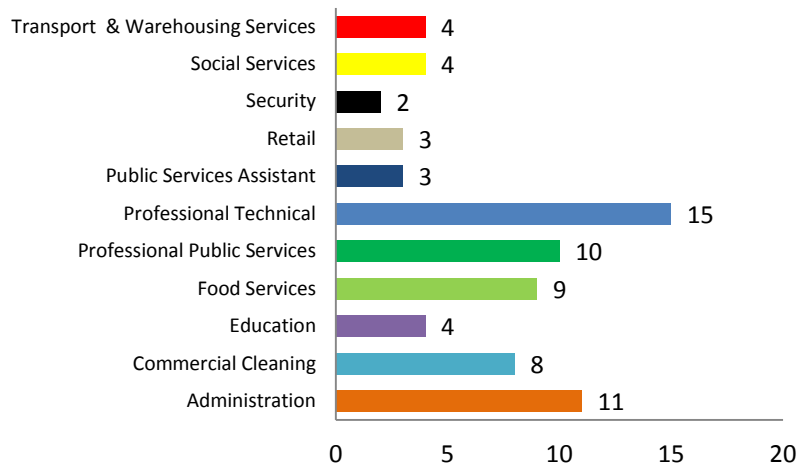
## Service Statistics

Our services continue to be in demand with several enquiries every week from people requiring support in their employment, asking for support to get a job and parents and schools about transition services.

Clients Currently in Service, and Awaiting Service

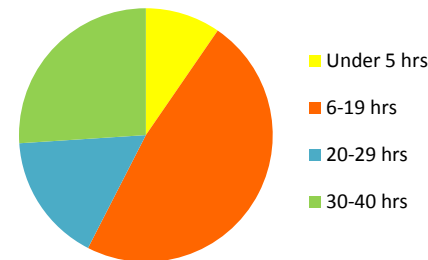


Employment Breakdown by Job Type



Employment Support Duration

*We are supporting 73 clients in Employment*



Clients Hours of Work per Week

## Special thanks to our Volunteers

Brent Manning, Ed Loudon and David Bennett from KPMG for facilitating and implementing the audit of the 2012 Emerge accounts.

Richard Finlay who has continued to provide IT support and implemented the recent software upgrades;

Kirsty Fergusson, (ex-Chair of Emerge) who continues to provide on-going support and supervision to management and also the facilitation of this year's strategic planning meeting.

Jo Maling, for facilitating our client focus group meetings;

Chris Lipscombe, Chairman of Emerge, who continues to provide many hours of business advice and mentoring;

The Emerge Trustees whose enthusiasm and passion continue to provide good governance.

*and thanks to:- our dedicated staff, our funders, both private and public, our board for their support, passion and continued interest, our clients, for choosing Emerge as their service provider and the generosity of other organisations within this field for their assistance, information.*