



2017 ANNUAL REPORT

CHAIR AND CEO REPORT

Over the 2016-2017 period Avalon has focused on embedding our facilitation model, following the significant transformational change process in 2015. Avalon is no longer providing a traditional site-based, programmed day service. We now work alongside disadvantaged individuals, one person at a time and strive to enhance their knowledge, skills and abilities in seven domains of an ordinary life. These seven domains include: independence; relationships; health and well-being; having a home; creative leisure; employment and self-agency.

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We aim to reduce barriers to inclusion in a client's community and support the development of valued roles, so they can live an ordinary life of their choosing.

The principles of Enabling Good Lives and Social Role Valorization have provided the framework for Avalon's new way of working, with a person-centred approach, utilising the mainstream as a first option wherever possible. Government contracts also now require services to align to the principles of Enabling Good Lives. For most clients, this has been a significant change and as a team we have been extremely humbled and encouraged by the results which are reflected in more individuals achieving their aspirations and making informed choices around how they want to live their lives.

CLIENTS

The successes for individual clients have been many and varied. For some, the past year has seen completion of tertiary study or further education, gaining employment, volunteering, or moving into their own home. For others, successes may be more incremental but are by no means less significant.

The following provides a snapshot of clients involved in various aspects of an ordinary life.

Paid Employment	22
Volunteering	20
Toi Ohomai Work Skills	9
Main Stream Education/Training programmes	13
Job Seekers (working with employment support services)	9



TE WHIRONUI

In May, Ngati Ranginui and Avalon completed the co-design of a Kaupapa service model. The new service, Te Whironui, was launched and Kurt Macalister was appointed into the role of Kaiarataki. The first year for Te Whironui has been very successful with 75% of the contract fulfilled. We look forward to developing Te Whironui further over the next year, providing Maori who have a disability and their whanau a quality Kaupapa service to achieve their lives of value.

AVALON TEAM

To provide optimal support for our clients to achieve their good lives it is critical that Avalon continues to invest in the growth and development of our staff. During the 2016-2017 financial year, Avalon has made a significant investment into our team to ensure that they are equipped with the skills and knowledge to be effective in their roles.

We thank each member of the Avalon team for their commitment and dedication in working alongside their clients to support the achievement of an ordinary life of their choosing.

VOLUNTEERS

Avalon is grateful to have a team of dedicated volunteers, whose time and commitment has been critical to our success. We appreciate all they do and look forward to working together in the future.



32 volunteers



1002 hours from
September 2016 – June 2017

COLLABORATION

During the 2016/2017 year Avalon has worked hard to establish regular meetings with several agencies, both individually and collectively. For optimal client outcomes it is critical that providers across the Bay of Plenty region seek to collaborate wherever possible.

Furthermore, Avalon, in conjunction with several other agencies, is leading the re-establishment of a community of practice.

Avalon continues to be involved wherever possible within sector leadership and are active members of :

- Inclusive NZ (Tania Wilson is now a sitting board member of Inclusive NZ)
- NZDSN (New Zealand Disability Support Network)
- Western Bay of Plenty Disability Trust
- Multi-agency Task Force for Employment in Tauranga
- Disabled Persons Assembly
- Enabling Good Lives Leadership National Road Show
- Volunteering Bay of Plenty

Members of the Avalon team have presented at several conferences and forums over the course of the year.

FINANCIAL SUSTAINABILITY

The 2016-2017 financial year resulted in surplus of \$157,302 against a forecast deficit of \$32,550. Additional operational funding was received in grants from TECT, Acorn Foundation, and Te Pou as well as from our working partnership with Ngati Ranginui which contributed to this positive financial result. We would like to acknowledge and thank the funders and our ministry partners for their support and contribution.

The recent central Government announcements of the Pay Equity Settlement and Disability System Transformation will likely have a financial impact on Avalon as we move forward. Our work and focus over the next year will be to create financial models that will ensure Avalon's long-term financial sustainability in the changing contracting environment.

BOARD MEMBERS

Avalon is very fortunate to have a board of volunteers who generously provide their time and experience for the benefit of our organisation. We sincerely extend our thanks and appreciation for their contribution and for their guidance as we look to continue our progress and development into the future.



FINANCIAL STATEMENTS

Avalon (BOP) Incorporated Year Ended 30 June 2017

Revenue

Donations, fundraising and other similar revenue	73,358
Revenue from providing goods or services	798,193
Interest, dividends and other investment revenue	77,983
Other revenue	16,120

Total Revenue **965,654**

Expenses

Employee and volunteer related expenses	583,372
Expenses related to providing goods or services	196,236
Other expenses	28,745

Total Expenses **808,353**

Surplus for the Year prior to Distribution **157,302**

Distribution to Avalon Aotearoa Charitable Trust 463,875

(Deficit)/Surplus for the Year **(306,574)**

Assets

Current Assets

Bank accounts and cash	119,989
Debtors and prepayments	32,266

Total Current Assets **152,255**

Non-current Assets

Property, Plant and Equipment	43,907
Investments	167,508

Total Non-Current Assets **211,415**

Total Assets **363,670**

Liabilities

Current Liabilities

Creditors and accrued expenses	41,246
Employee costs payable	7,144

Total Current Liabilities **48,389**

Total Liabilities **48,389**

Total Assets less Total Liabilities (Net Assets) **315,281**

Accumulated Funds

Accumulated surpluses or (deficits)	197,396
Reserves	117,884

Total Accumulated Funds **315,281**

SUMMARY

2017 was the first full year of trading since the transformation to supporting individuals on a pathway to independence, to achieve their goals and aspirations and live a good life of value. The society had a trading surplus of \$157,302 for the year. The society distributed excess funds to Avalon Aotearoa Charitable Trust before balance date. The transition from the society to the Charitable Trust was completed after balance date.

Michelle Mortlock

Treasurer

BOARD MEMBERS



Vaughan Anderson



Helen Brownlie



Paul Curry



Raymond Eberhard



Robert Mangan



Michelle Mortlock



Mary Mullany



Wendy Neilson



Scott Wikohika



CEO: Tania Wilson

Avalon works with individuals and their circles of support, to identify and map out pathways towards a good life of their choosing. The work of the Avalon facilitators is informed by the principles of Enabling Good Lives, Social Role Valorisation (SRV) and “The Lightest Touch”. Avalon works alongside disadvantaged individuals to enhance their knowledge, skills and abilities. We aim to reduce barriers to inclusion in their community and support the development of valued roles so they can live an ordinary life of their choosing.

Avalon (Aotearoa) Charitable Trust

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