

Presbyterian Support Otago

# Annual Report 2023

*People helping people*



Presbyterian Support  
Otago



**enliven**  
PRESBYTERIAN SUPPORT OTAGO

**Family  
Works**  
PRESBYTERIAN SUPPORT  
OTAGO

The Family Works Stepping Stones whānau, who live with mental health challenges, enjoy some fun at their annual camp in North Otago.

# Contents

Thanking our supporters	3
Chair's report	4
Chief Executive's report	5
Family Works	6
Enliven services	8
How you helped / Volunteering / Year in dollars	10
Summary general purpose financial report	11
PWC auditor's report	14
Acknowledgements	15
Contact details	Back Cover

## Our Vision

### **Tō Mātou Matawhānui**

Every person is valued and grows in a safe and strong community.

## Our Mission

### **Tō Mātou Whakatakanga**

We walk with people across the generations to create together places to live, learn and thrive. We call out injustice and advocate for positive social change.

## Our Values

### **Ō Mātou Uara**

Founded in our Christian faith we act with the values of integrity, respect, courage, manaaki and aroha.





*thank you!*

## To our supporters

We are incredibly fortunate to have so many people supporting our social services work so everyone can feel valued and live in a community where they are safe and strong.

Whether its gifts-in-kind, financial donations or your valuable time, you, our donors and supporters make a real difference.

Your generosity means we can help vulnerable and less fortunate people by providing necessary food parcels, financial and budgeting advice, access to social services, and parenting and children's programmes, to name just a few.

We have heard many heartbreaking stories from people who have endured a lot in this past year. We have walked beside them, guided them and helped them and this is because you see the value of what we can do together to make a real and positive difference.

Our annual fundraiser for our foodbank, Octacan, once again saw just how generous people are. We received an incredible 18,689 cans and packets of food, \$12,283 in cash donations and had countless schools and organisations contributing to this appeal.

Our quarterly People magazine is produced in-house and helps keep our supporters up-to-date with our latest challenges and good news stories. It is available by email or post, and if you would like to receive a copy, please email me at [fundraising@psotago.org.nz](mailto:fundraising@psotago.org.nz).

A big thank you from me to you!

Warm regards

**Jude McCracken**  
Supporter Engagement Manager

# Chair's report

Tēnā koutou.  
Ko Hereweka te mauka.  
Ko Rotopateke te moana.  
Ko Ngāti Pakeha te iwi.  
No Kōtarani ōku tīpuna.  
Ko Clark te whānau.  
Ko Stephen Clark rāua ko Fienie Clark kā mātua.  
Ko Daniel Pettigrew tōku hao rakatira.  
Ko au tēnei.  
Ko Stephanie Pettigrew tōku ikoa.  
Nō reira, tēnā koutou katoa.

It is a privilege to write my first report as the Chair of the Presbyterian Support Otago (PSO) Board.

Tim Mephram stood down as Chair in December 2022 after being elected to the Otago Regional Council, and he finished his time on the PSO Board in June 2023. I would like to thank Tim for his many years of service to PSO and for the work he did as Board Chair. I am grateful to Tim and to many others who have gone before me in this role, and I hope that I can continue their good work in serving PSO and the people of Otago.

PSO is an amazing organisation to be a part of. Jo O'Neill and the senior leadership team work exceptionally hard, as do all our staff and volunteers. PSO is lucky to have committed people who believe in our vision that every person is valued and grows in a safe and strong community. I am grateful to every one of our staff, volunteers, and

donors. Without your ongoing support, PSO could not continue its mission of walking with people across the generations to create together places to live, learn, and thrive. Without you we could not call out injustice and we could not advocate for positive social change. Thank you for everything that you do.

It will be clear from this annual report that the financial year ended 30 June 2023 has been another difficult year. We have experienced the biggest operational loss in the living memory of this organisation. We have been hit hard by continual underfunding of aged care by the government, the lack of parity in wages for aged care nurses, the increasing cost of providing services combined with the increased need for support in our community. We are deeply concerned by the growing inequality in Aotearoa. The ongoing sustainability of charitable organisations like PSO is at risk if real change does not happen soon.

Despite our difficulties we remember that we are founded in our Christian faith and that we have hope in a God who promises strength to the weary. We need that strength to continue, and we need your prayers and your support more than ever as we face the challenges of the coming year.

Grace and peace.

**Stephanie Pettigrew**  
Board Chair



## *Our Board*

Left-right: Stephen Willis, Gillian Musuka, Mark Shirley (Clinical Governance Chair), Kerry Enright (Deputy Chair), Stephanie Pettigrew (Board Chair), Stephen Christensen (Governance Committee Chair), Craig Wyatt (Finance, Audit & Risk Committee Chair), and Jessica Palmer

# Chief Executive's report

It won't come as any surprise to you that there has been a lot of public commentary about the high cost of living and the impact this has had on many New Zealanders.

We have seen first-hand how this is having serious repercussions for Kiwi whānau and their tamariki. Our foodbank has seen increased demand (12% increase between January and April 2023 compared to the previous year), but we have also experienced incredible generosity by people donating much-needed food to keep our shelves stocked. Our annual Octacan appeal saw almost 20,000 cans of food donated. That's a wonderful example of how people in our community care for others.

Our strategic plan continues to be implemented. This included the sale of non-strategic assets such as Guthrie House (Moray Place) and the former YouthGrow site in North East Valley. We have been heartened to have the Flagstaff Community Church in Wakari reach out to us and offer a space for the YouthGrow team. This partnership demonstrates the special relationship we have with the Presbyterian Church which was formalised when a Memorandum of Understanding was signed earlier this year.

Late last year we also made the difficult decision to close the Lindsay Unit at Ross Home. The good news is that the unit has been transformed and will reopen as the Macara Unit, named after Ross Home stalwart, Betty Macara, who was matron of Ross Home for many years and then became a resident, passing away aged an incredible 102! This unit will provide much needed hospital-level care to our community.



We have much to do as many vulnerable people struggle in these difficult times but together we continue making a positive difference.

The team at PSO have worked incredibly hard in difficult times and continue to commit to our mission every day. Their mahi and dedication is greatly valued and the impact they have on those in need in our communities is much appreciated. Thank you to everyone in the PSO team.

Thank you also to our donors, supporters and volunteers who make the work that we do possible!

Finally, I would like to thank the PSO Board for their guidance, support and commitment to PSO. I'd also like to acknowledge our new Chair, Stephanie Pettigrew and Deputy Chair, Kerry Enright.

Noho ora mai

**Jo O'Neill**  
Chief Executive

## Senior Leadership Team



**Jo O'Neill**  
Chief Executive



**Carmen Batchelor**  
Family Works Director



**Andrew Borthwick**  
Finance Director



**Joanne Greatbanks**  
Corporate Operations  
Director



**Ronda Keen**  
Executive Administrator



**Sally O'Connor**  
Enliven Director

# Family Works



**Kia Ora Koutou, Talofa Lava, Mālō e lelei, Kia Orana, Mālo Ni, Fakalofa lahi atu, Ni sa Bula Vinaka, Taloha Ni, Nā Lāo, Greetings.**

Living life in the post-COVID world, yet still navigating the detrimental and exhausting ripple impacts of what COVID has done to our tamariki, rangatahi and whānau, our staff and our community, has presented increased challenges, changes and complexity in ways we could not have imagined.

The persistent and devastating impact of the cost-of-living crisis, further entrenchment of poverty, including lack of adequate income to afford basics, such as food and energy, insecure and unaffordable housing, low wages, continued increases in family harm, and mental health distress, including increasing numbers of individuals and families who have never accessed social support to our services, is unprecedented and continues to take a significant toll in our community.

Collaboration and strengthening our collective impact as a high trust community-based provider as part of our wider social sector village is key to who we are. We keep our focus by ensuring tamariki, rangatahi and whānau are at the heart of all we do, and is in line with our vision, mission and values.

It is an absolute privilege to working alongside many community and government agencies across our region, including many cross-agency collaborations. I have the privilege of serving as the NGO community-based governance representative with Whangaia Nga Pa Harakeke ki Otepoti, a community-led collaboration with joint leadership with mana whenua, Te Rūnanga o Ōtākou, to ensure all whānau experiencing family harm in our community are responded to and engaged with in a way that is respectful, responsible, accountable, culturally relevant and effective.

At Family Works we continue to progress our commitment to our understanding of tikanga and mātauranga Māori, and its place in our everyday work, including reflecting on our role as people of the Treaty, who we are and where we come from.

The gap in funding to ensure the sustainability of the community social service sector across New Zealand, which includes Family Works, continues to widen against a backdrop of increasing need which is multiple and complex. The Social Service Providers Association (SSPA) commissioned "an independent study which has found that New Zealand social service providers are

*underfunded by at least an estimated \$630 million per year and are over-reliant on the philanthropic sector".*

To add to this, and due to the chronic underfunding of our aged residential care sector, there has been less internal investment for Family Works which has had a flow-on effect and in real terms has impacted our service delivery.

A key highlight is the relocation of our YouthGrow Youth Development Programme. Thank you to the kindness and generosity of Flagstaff Community Church for entering into a wonderful partnership with us by opening up and sharing their space with our YouthGrow young people and their families.

I want to take this opportunity to acknowledge and offer my sincere and heartfelt thanks to many of our Presbyterian parishes and other churches across our region for providing vital food, resources and prayers for our staff and our community. This makes a huge difference to us.

To our Family Works team, my wholehearted thanks for outstanding care and service to our community, you truly walk the talk and show our values of aroha, manaaki and respect each and every day.

Finally, I want to extend my heartfelt thanks to our many supporters, encouragers, elders, community and government agency partners, funders, donors, volunteers and churches who continue to support us as we could not meet the community need without you.

***He aha te mea nui o te ao? He tāngata, he tāngata, he tāngata!***

***What is the most important thing in the world? It is people, it is people, it is people!***

Ngā mihi aroha and blessings to you all

**Carmen Batchelor**  
**Family Works Director**



# Family Works

**5,194**

Family Works clients

**24,058**

Family Works client contacts

**4,945**

Food parcels supplied

**311**

Children who participated in Family Works programmes



*Stepping Stones members enjoy hanging out at Camp Iona*

## How many we helped

Parenting programmes	77
Children's group programmes	101
Buddy Programme	208
YouthGrow students	17
Social Work clients	505
Foodbank clients (Immediate Assistance)	2,141
Financial Mentoring clients	1,021
Financial other (ERANZ, Energy Mates)	179

## What our clients say about us

**81%**

of clients say they learnt useful new skills/strategies

**71%**

of clients report improved relationships

**94%**

of clients say our services were accessible

**99%**

of clients say they met their goals

## Stepping Stones

Stepping Stones is a community service, run by Family Works in South Dunedin, promoting mental and social wellbeing and resilience.

The service is built on the Five Ways to Wellbeing:

1. Give
2. Be active
3. Keep learning
4. Connect
5. Take notice

This is achieved by providing a wide and varied range of activities, including woodwork, crafts, guest speakers, and community visits. All members are encouraged to be involved in planning and decision making.

Regular garage sales and craft markets selling handmade and donated goods provide opportunities to welcome the wider community and raise money for extra activities such as day trips, meals out, and camps.

This year the group headed to Camp Iona, near Oamaru and despite quite a lot of rain and getting stuck in mud, the group had plenty of fun exploring the area, including picnicking alfresco, op shopping and dining at local restaurants.

Camps are a great opportunity for Stepping Stones members to leave town, get to know each other a little better, have some fun, and sit around the camp fire sharing laughter, stories and memories.

# Enliven services

This year has seen a lot of change and the significant issues for Enliven aged care services are ongoing. I started in the Enliven Director role in December, and it has been a steep learning curve understanding the sector and getting to know the PSO and Enliven teams. I have had amazing support from everyone.

We are very lucky to have an experienced team of facility managers who have worked for the organisation for several years. We have also welcomed two new facility managers this year, Kim Tilly at Elmslie House and Elmer Rodriguez at Holmdene and we have also welcomed back Regan Gilchrist, Alexa Gutowska and Nina Lunn into important senior nursing positions.

Our workforce are our most important asset and key to ensuring we can deliver safe, high-quality care to our residents. It takes a whole team to make Enliven successful. As a team we have been working hard to improve our staff retention rates by providing an environment where everyone enjoys coming to work and feels valued for the important role they play in our residents' lives. Enliven has benefited from leadership and inclusive workplace training for our senior leaders

and over the next 12 months we intend to continue to roll this out.

We are still very reliant on internationally trained nurses, and it has been great to see several nurses supported by PSO to achieve registration. We want our international staff to become part of our community and this has been helped by local people providing accommodation and practical support, something that is appreciated by us.

For a short period of time, we were able to match pay parity with registered nurses at Te Whatu Ora but this was short lived. It is important that nurses, no matter where they work, are paid the same rates. PSO continues to advocate nationally for improved recognition of the aged care nursing workforce.

A big thank you to the wonderful Enliven team for their patience while I have been learning the ropes. I now know a lot more about kitchens, laundries, maintenance, and buildings than I ever thought was possible!

**Sally O'Connor**  
Enliven Director



## How we helped

**764**

Residents in our care homes

(158,928 bed nights)



**41,548**

Meals on Wheels delivered

**145**

Older people attending Club Enliven day programmes

(6,445 attendances)

**30**

Clients supported by the Individualised Funding contract

**15**

Older people being supported with a Visiting Volunteer

**85%**

of residents and relatives agree "This support service has made a positive difference to my life".

**9**

Residential Aged Care Homes



# From one side of the world to the other

**Stella Taylor (nee Macpherson) has lived a long and happy life, starting in Glasgow, Scotland and eventually making her way to the South Otago town of Balclutha. Stella now lives at Holmdene in Balclutha.**

In her 20s, Stella married Jim Taylor in 1952 before Jim was heading back to Malaysia (then known as Malaya). Jim was in the armed forces, having already been in Palestine for four years. His posting to Malaysia was during a time of political unrest while Malaysia sought independence. But the couple forged a life in the Southeast Asian country for 10 years with the oldest son, Tom, who was born in Scotland before two other children, Barbara and Alan, were born in Malaysia.

“Living in Malaysia was quite different to Glasgow”, says Stella. “It was hot and humid!”

As Tom was just a baby, he was left in Scotland with Stella’s mother while the couple settled into their new lives.

“It was a wrench leaving him behind but I knew he was in a safe pair of hands with my mother who took good care of him. Once Jim and I were settled, we went back to collect Tom who was, by then, about three years old.”

In 1963 the family moved to New Zealand. For five years they lived in Nelson before moving to Balclutha where Jim took up the role of Court Registrar for the Justice Department.

By that stage their fourth and final son, Ian, had arrived. Today Stella has grandchildren and great-grandchildren and while she was a stay-at-home mother, she was active in her community, including being involved with the Blind Foundation (now known as Blind Low Vision NZ).

Stella and Jim lived in their own home well into their 90s and while Jim has now passed away, Stella, remained in

the family home until she was an incredible 94! She’s now a resident at Holmdene, which, in her own words, is “pretty good.”

If there’s one thing that many people don’t know about Stella is that she was a keen diarist, keeping a day-to-day record of her activities when the family moved to New Zealand. While her intention was to start one each year and complete it, the reality was somewhat different, with Stella confessing being unable to complete most of them, not for lack of trying! Nevertheless, her entries are a snapshot of what life was like many years ago in New Zealand.



*Stella Taylor holds an early family portrait*

## Advocating for vulnerable older people

Presbyterian Support Otago (PSO) continues to shine a light on how serious the situation the aged care sector is facing with continued underfunding from successive governments.

In the past year over 1,000 aged care beds have permanently closed with up to 1,200 closed temporarily due to staff shortages.

PSO Chief Executive, Jo O’Neill, says by 2030 New Zealand will need 13,200 more beds than are presently available but without an immediate injection of funding, we will not be able to provide these beds.

“Compared to commercial retirement village providers, we do not have the luxury of being able to reinvest income returns into our aged care beds. Our model of care is providing beds to older people who cannot afford to live in retirement villages.”

3

Retirement Villages

2

Rental cottage locations

3

Locations for day programmes

# How you helped

**1,010**

Donors

**213,230**

Gift-in-kind items  
were donated

**519**

Volunteers

**65,312**

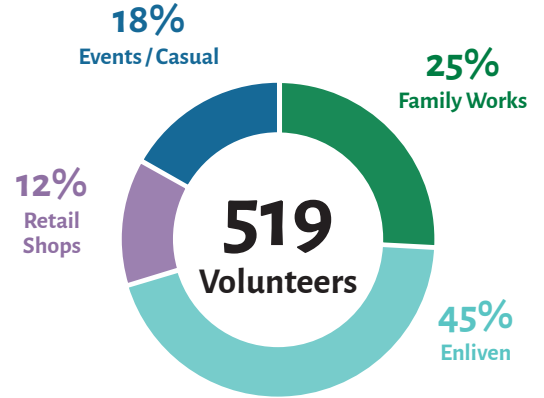
volunteer hours

**\$1,482,583**

What our volunteers are worth if they were paid the minimum wage of \$22.70

# Volunteering

Volunteers are a huge part of our services. Our volunteers work across Enliven, Family Works, events and retail shops.



# The year in dollars

**\$3,155,399**

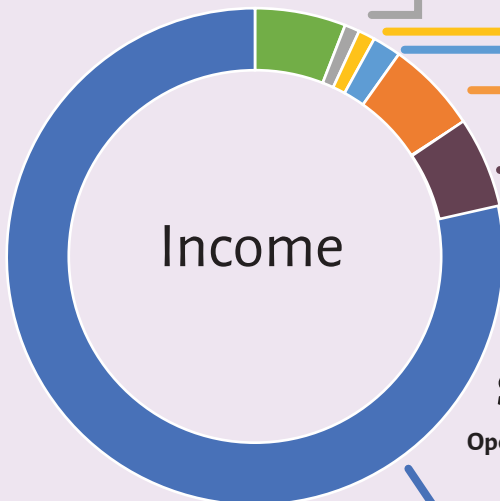
Family Works contracts,  
retail & other

**\$419,630**

Financial donations, bequests  
and vouchers received

**\$336,013**

Received from grants for  
programmes and services



**\$37,958,001**

Enliven and retirement villages



**\$48,683,030**

Income

**\$46,932,912**

Expenditure

**\$1,750,118**

Net surplus  
(revaluations)

# Summary General Purpose Financial Report

## Presbyterian Support Otago Incorporated Summary Consolidated Statement of Service Performance

For the Year ended 30 June 2023

### Enliven Services

Presbyterian Support Otago (PSO) owns and operates nine aged care facilities in Dunedin (Ross Home and St Andrews), Mosgiel (Taieri Court), Oamaru (Iona), Balclutha (Holmdene), Alexandra (Ranui and Castlewood) and Wanaka (Elmslie House and Aspiring Enliven Care Centre). Via its subsidiary PSO Retirement Villages Limited, PSO also owns and operates three retirement villages - Wanaka Retirement Village in Wanaka, Ranui Court in Alexandra and Columba Court in Oamaru. Combined, these villages offer 47 villas, apartments and cottages.

Enliven Residential Facilities	FY 2022	FY 2023
Total days of care provided	163,898	158,928
Total people served	745	764

Occupancy	FY 2022 Target	FY 2022 Achieved	FY 2023 Target	FY 2023 Achieved
Total	95.9%	93.6%	94.8%	86.9%

Number of residents accessing our retirement village services	FY 2022	FY 2023
Total residents in the year	55	56

### Family Works

PSO Family Works provide a range of programmes and supports for individuals, youth and whānau. Our services include social work, a foodbank, financial inclusion and capability services, parent education programmes, youth and adult mental health support, a Buddy programme, child and youth development programmes, and family dispute resolution referral support.

Family Works			
Children's Groups & Youth Development		2022	2023
· Buddy programme	· Number of matched young Buddies	178	208
· Youth development	· Number of active students	28	17
Financial Inclusion Services			
· Financial mentoring	· Number of clients accessing our services	1014	1021
	· Number of sessions	3110	3605
Social Work			
· Foodbank	· Number of food parcels provided	4721	4945
· Social work support	· People supported	357	505
Adult Mental Health			
· Stepping Stones	· Number accessing services	66	70
Ethnicity			
Ethnicity of clients accessing our services	· % of Māori clients total	20.2%	18.0%
	· % of Pacifica clients total	4.8%	4.2%
	· % of NZ European clients	63.5%	66.5%
	· % of other cultures	11.5%	11.3%

# Summary General Purpose Financial Report

## Presbyterian Support Otago Incorporated

### Summary Consolidated Statement of Comprehensive Revenue and Expense

For the Year ended 30 June 2023

	Group 2023 \$000's	Group 2022 \$000's
<b>Income</b>		
Income from services	38,972	38,911
Sale of goods	1,264	1,273
Donations, grants and bequests	756	932
Other income	3,130	4,051
<b>Total Income</b>	<b>44,122</b>	<b>45,167</b>
<b>Expenditure</b>		
Employment related	33,979	31,760
General operating	7,338	7,363
Office & administration	2,733	3,204
Other expenditure	1,591	1,580
Finance costs	257	97
<b>Total Expenditure</b>	<b>45,898</b>	<b>44,006</b>
Operating surplus before increase in ORA expense	(1,766)	1,161
Increase in ORA expense	1,035	545
<b>Net Operating Surplus / (Deficit) for year</b>	<b>(2,811)</b>	<b>616</b>
Share of net surplus / (deficit) Joint Venture	(100)	28
<b>Net Surplus / (Deficit) for the Year</b>	<b>(2,911)</b>	<b>644</b>
Other Comprehensive Revenue and Expense		
Gain on revaluation of Operating Property	4,661	-
<b>Total Comprehensive Revenue and Expense</b>	<b>1,750</b>	<b>644</b>

### Summary Consolidated Statement of Changes in Net Assets / Equity

For the Year ended 30 June 2023

	Group 2023 \$000's	Group 2022 \$000's
<b>Opening Balance of Equity</b>	<b>57,813</b>	<b>57,169</b>
Plus:		
Total Comprehensive Income	1,750	644
<b>Closing Balance of Equity</b>	<b>59,563</b>	<b>57,813</b>

### Summary Consolidated Statement of Financial Position

As at 30 June 2023

	Group 2023 \$000's	Group 2022 \$000's
<b>Equity</b>		
Represented by:		
<b>Current Assets</b>	7,030	6,240
<b>Non-Current Assets</b>	81,819	79,281
	88,849	85,521
<b>Current Liabilities</b>	27,227	24,344
<b>Non-Current Liabilities</b>	2,059	3,364
	29,286	27,708
<b>Net Assets</b>	<b>59,563</b>	<b>57,813</b>

Signed for and on behalf of the Board as at 29<sup>th</sup> September 2023:



Mrs Stephanie Pettigrew  
Chair



Mr Craig Wyatt  
Trustee



# Summary General Purpose Financial Report

## Presbyterian Support Otago Incorporated Summary Consolidated Statement of Cash Flows For the Year ended 30 June 2023

	Group 2023 \$000's	Group 2022 \$000's
Net Cash flows from Operating Activities	(2,528)	(139)
Net Cash flows to Investing Activities	2,220	(1,149)
Net Cash flows to Financing Activities	513	1,191
<b>Net Cash Flow</b>	<b>205</b>	<b>(97)</b>
Opening Balance at 1 July	2,770	2,867
<b>Closing Balance at 30 June</b>	<b>2,975</b>	<b>2,770</b>

## Notes to the Summary General Purpose Financial Report For the Year ended 30 June 2023

These are the summary general purpose financial report of Presbyterian Support Otago Incorporated group for the year ended 30 June 2023.

The specific disclosures included in the summary general purpose financial report have been extracted from the full general purpose financial report authorised for issue by the Board on 29 September 2023. The full general purpose financial report have been prepared in accordance with Generally Accepted Accounting Practice in New Zealand (NZ GAAP) and they comply with the Public Benefit Entity (PBE) Accounting Standards applicable to not-for-profit entities.

The summary general purpose financial report does not include all the disclosures provided in the full general purpose financial report and cannot be expected to provide as complete an understanding as provided by the full general purpose financial report.

An unmodified audit opinion dated 2 October 2023 has been received on the full general purpose financial report for the year ended 30 June 2023. A copy of the full general purpose financial report for Presbyterian Support Otago Incorporated for the year ended 30 June 2023 may be obtained by contacting Presbyterian Support Otago on 03 477 7115 or by writing to PO Box 374, Dunedin.

The summary general purpose financial report have been examined by our auditors for consistency with the full general purpose financial report. The summary general purpose financial report were approved for issue by the Board of Presbyterian Support Otago Incorporated on 29 September 2023.

### 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").

The summary general purpose financial report of Presbyterian Support Otago Incorporated have been prepared in accordance with PBE FRS 43: Summary Financial Statements. The presentation currency is New Zealand dollars, rounded to the nearest whole thousands (\$000's).

### Specific Accounting Policies

All specific accounting policies have been applied on the same basis as those used in the full general purpose financial report of Presbyterian Support Otago Incorporated.

### Full financial report

The full financial report is available on our website at [www.psotago.org.nz](http://www.psotago.org.nz).

# PWC auditor's report



## Report of the independent auditor on the summary general purpose financial report

To the Board of Presbyterian Support Otago Incorporated

The summary general purpose financial report which comprises:

- The summary consolidated financial statements including:
  - the summary consolidated statement of financial position as at 30 June 2023;
  - the summary consolidated statement of comprehensive revenue and expense for the year then ended;
  - the summary consolidated statement of changes in net assets/equity for the year then ended;
  - the summary consolidated statement of cash flows for the year then ended; and
  - notes to the summary general purpose financial report.
- The summary consolidated statement of service performance for the year ended 30 June 2023.

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### Our opinion

The summary general purpose financial report is derived from the audited general purpose financial report of Presbyterian Support Otago Incorporated (the Charitable Trust), including its subsidiaries (the Group) for the year ended 30 June 2023.

In our opinion, the accompanying summary general purpose financial report is consistent, in all material respects, with the audited general purpose financial report, in accordance with FRS-43: *Summary Financial Statements* issued by the New Zealand Accounting Standards Board.

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### Summary general purpose financial report

The summary general purpose financial report does not contain all the disclosures required by New Zealand equivalents to International Financial Reporting Standards (NZ IFRS). Reading the summary general purpose financial report and the auditor's report thereon, therefore, is not a substitute for reading the audited general purpose financial report and the auditor's report thereon. The summary general purpose financial report; and the audited general purpose financial report do not reflect the effects of events that occurred subsequent to the date of our report on the audited general purpose financial report.

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### The audited general purpose financial report and our report thereon

We expressed an unmodified audit opinion on the audited general purpose financial report in our audit report dated 2 October 2023. That report included an Other Matter section indicating that the consolidated statement of service performance for the corresponding year ended 30 June 2022 is unaudited.

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### Information other than the summary general purpose financial report and auditor's report

The Board is responsible for the annual report. Our opinion on the summary general purpose financial report does not cover the other information included in the annual report and we do not express any form of assurance conclusion on the other information.

In connection with our audit of the summary general purpose financial report, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the summary general purpose financial report, or otherwise appears to be materially misstated. If, based on the work we have performed on the other information, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

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### Responsibilities of the Board for the summary general purpose financial report

The Board is responsible, on behalf of the Charitable Trust, for the preparation of the summary general purpose financial report in accordance with FRS-43: *Summary Financial Statements*.

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### Auditor's responsibility

Our responsibility is to express an opinion on whether the summary general purpose financial report is consistent, in all material respects, with the audited general purpose financial report based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) 810 (Revised), *Engagements to Report on Summary Financial Statements*.

We are independent of the Group. Our firm carries out other services for the Group in the areas of Trust Deed Compliance services in the form of a separate Deed of Supervision report. The provision of these other services has not impaired our independence as auditor of the Group.

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### Who we report to

This report is made solely to the Charitable Trust's Board, as a body. Our audit work has been undertaken so that we might state those matters which we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charitable Trust and the Charitable Trust's Board, as a body, for our audit work, for this report or for the opinions we have formed.

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*PricewaterhouseCoopers*

Chartered Accountants  
6 October 2023

Christchurch

PricewaterhouseCoopers, 60 Cashel Street, PO Box 13244, Christchurch 8013, New Zealand  
T: +64 3 374 3000, pwc.co.nz

# Acknowledgements

*Thank you!*

We gratefully acknowledge the support of the entire Otago community. Bequests, grants, gifts and donations are an important part of our income and make it possible for us to carry out our work each year.

## Grants

ACE Shacklock Charitable Trust  
Central Lakes Trust  
David Elliston Charitable Trust  
Graham and Olive West Charitable Trust  
John N Lemon Charitable Trust  
Kingston Sedgfield (NZ) Charitable Trust  
Mercy Hospital Dunedin Limited  
New Zealand Lottery Grant Board  
Otago Community Trust  
Patricia France Charitable Trust  
The Campbell Charitable Trust  
The Presbyterian Church Properties Trustees (incl McGruer Est)  
The Timothy Blair Trust  
The Tindall Foundation

Church of Christ  
Coastal Unity Parish  
Columba College  
Community Care Trust  
Cokes  
Cottonsoft Ltd  
Countdown Central  
Countdown Mosgiel  
Couplands Kaikorai Valley  
Cowell's Genuine Pavlovas  
CrackerJax Early Learning Centre  
Danish Delights  
Deloitte  
Department of Conservation  
Department of Corrections  
Dog Rescue Dunedin Charitable Trust  
Dunedin City Council  
Dunedin Harbour Rotary Club  
Dunedin Hospital, Sterile Department

Jenny Craig  
John McGlashan College  
John's Furniture Warehouse  
Jonathan Rhodes Kindergarten  
Kaan's Catering Supplies Limited  
Kaikorai Presbyterian Church  
Kaikorai Valley College  
Kainga Ora  
Kiddies Campus  
King's High School  
KiwiHarvest  
Knox Church, Dunedin  
Knox College  
Kowhai Bush Farms  
Lawrence/Waitahuna Presbyterian Parish  
LJ Hooker Dunedin  
Logan Park High School  
Macandrew Bay School  
Mama Donuts  
Maniototo Presbyterian Church

Pioneers Russell Street  
Platinum Recruitment  
Polson Higgs  
Port Chalmers Four Square  
Port Otago  
Public Health Service  
Punavai o le Atamai Preschool  
Queen's High School  
Ravensbourne School  
RCP  
Reformed Church of Dunedin  
Roslyn Kindergarten  
Ross Dowling Marquet Griffin  
Ross Home  
Rotary Club of Dunedin (Inc)  
Salmond College  
Salvation Army  
Scenic Hotel Dunedin City  
Select Recruitment  
Silver Fern Farms  
Southern District Police

## Legacies

Eileen Marjorie Horton Estate  
E G Johnstone Trust  
David Gibbons Lattimer Estate  
Robert Lennard MacGillivray Estate  
Catherine McLeod Estate  
Isabel Meredith Malloch Estate  
Nance White Orr Estate  
Gordon Webster Estate  
Margaret Helen Williamson Estate

Dunedin Kindergarten Association  
Dunedin North Intermediate  
Dunedin Public Library  
Dunedin South Presbyterian Church  
Dunedin Training Centre  
Early Childhood on Stafford  
East Taieri Gardens  
East Taieri Presbyterian Parish  
Edinburgh Realty  
Equippers Church  
Fairfield School

Meat the Need  
MediaWorks (Radio) Otago  
Mercy Hospital Dunedin Limited  
Ministry of Education  
Ministry of Social Development  
Mirror Counselling  
Montessori House Ltd  
Morningson Hair Design  
Morningson Methodist Church  
Morningson Presbyterian Church  
Morningson School  
Mortgage Link

Southern Hospitality  
SPCA Dunedin  
St Clair Golf Club  
St Clair School  
St Margaret's College  
St Philips Church Grants Braes  
St Stephen's Leith Valley Presbyterian Church  
Stantec  
Summerset at Bishops Court  
SuperGrans Dunedin Charitable Trust

## Gifts-in-kind

ACC  
Admin NZ  
Alexander Marketing Limited  
Anderson Lloyd  
Andersons Bay Kindergarten  
Anglican Family Care  
Aquinas College  
Arana College  
Ashburn Clinic  
Audiology South Dunedin  
Aurora Energy  
B@tCH  
Balmacewan Intermediate  
Balmacewan Lions  
Bayfield Kindergarten  
Bear Park Early Childcare Centre  
Beca  
Best Start Kaikorai Valley  
Best Start Mosgiel  
BizRewards  
Brockville School  
Carisbrook School  
Caroline Freeman College

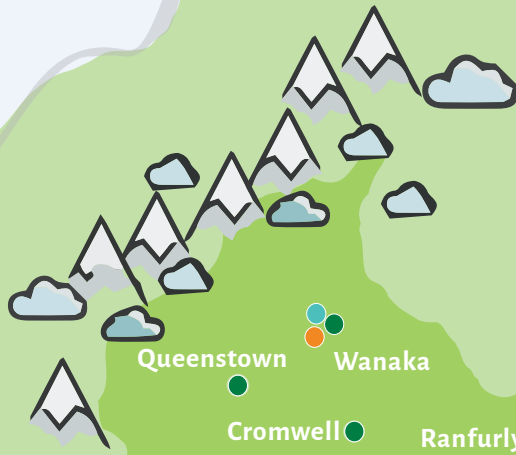
Family Ties Educare Dunedin  
Farmers Store Dunedin  
First Church  
Flagstaff Community Choir  
Flagstaff Community Church  
Fresh Choice Roslyn  
Galloway Cook Allan  
Gardens New World  
George Street Normal School  
Golden Centre Holding Ltd  
Good Bitches Baking  
Goodman Fielder NZ Ltd  
Grants Braes Kindergarten  
Grants Braes School  
Green Island Medical Centre  
Green Island School  
Halfway Bush Kindergarten  
Harbour Fish  
Harroway and Sons Limited  
Hayward College  
Highgate Presbyterian Parish  
Inland Revenue  
Inglinton Early Childhood Centre

Mosgiel Community Foodbank  
Musselburgh Baptist Church  
Musselburgh School  
Naylor Love  
New World - Centre City  
New World Gardens  
New Zealand Home Loans - Auckland Office  
Nidd Realty Ltd  
Opoho Presbyterian Church  
Otago Boys' High School  
Otago Community Trust  
Otago Girls' High School  
Otago Polytechnic Te Punaka Owhero  
Otago Regional Council  
Otago University Childcare  
Otago University Childcare Association Te Parekerekere o Te Ki  
Pak'nSave  
Palmerston/Dunback Presbyterian Church

Tahuna Normal Intermediate  
Taieri College  
Taste Nature  
Te Kaika Caversham  
Te Whatu Ora Southern  
The Warehouse South Dunedin  
Transport Repairs  
Trents Wholesale Limited  
Tuapeka Gold Print  
Turners and Growers Limited  
University College  
University of Otago  
University of Otago - Otago Vascular Diagnostics  
Vault 21  
Veggie Boys  
Wilkinson Rodgers  
Womens & Childrens Health  
Work And Income - South Dunedin  
WSP  
YouthGrow  
Zeagold Foods



Presbyterian Support  
Otago



- Support Centre
- Family Works
- Enliven
- Cottages and villages
- Retail Shop

## Support Centre

All Enquiries 03 477 7115  
407 Moray Place, Dunedin, 9054  
PO Box 374, Dunedin, 9054

## Family Works

All Enquiries Freephone  
0508 396 678

Presbyterian Support Otago

814 STAFF

519 VOLUNTEERS

## Enliven Services

### Residential aged care homes

Aspiring Enliven, Wanaka  
Castlewood, Alexandra  
Elmslie, Wanaka  
Holmdene, Balclutha  
Iona, Oamaru  
Ranui, Alexandra  
Ross Home, Dunedin  
St Andrews, Dunedin  
Taieri Court, Mosgiel

### Retirement villages

Columba Court, Oamaru  
Ranui Court, Alexandra  
Wanaka Retirement  
Village, Wanaka

### Rental cottages

Iona Cottages, Oamaru  
Ross Home Cottages,  
Dunedin

### Community-based services for older people

Club Enliven, Dunedin/  
Taieri/Alexandra  
HomeShare, Alexandra  
Individualised Funding  
Visiting Volunteers,  
Dunedin

## Family Works Services

### Social services

Community Foodbank  
Social Work  
Stepping Stones  
YouthGrow

### Parenting, support and children's programmes

Buddy Programme  
Grandy's Group  
Growing Taller  
Harakeke Group  
Heads Up  
Incredible Years

Negotiating the Minefield  
Strengthening Families

### Financial & budgeting

EnergyMate  
Financial Mentors  
Money Mates

### Good Loans

Alexandra, Balclutha,  
Dunedin, Oamaru,  
Queenstown and Wanaka

## Retail shop

Shop on Carroll  
169 Princes Street, Dunedin  
03 471 8249

Shop on Carroll Online  
[www.shoponcarroll.org.nz](http://www.shoponcarroll.org.nz)

[www.psotago.org.nz](http://www.psotago.org.nz)

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