



**KARLDON TRUST  
INCORPORATED**

**ANNUAL REPORT FOR YEAR ENDED 30  
JUNE 2017 – TE PŪRONGO Ā-MOTU MŌ  
TE TAU I TE 30 O PIPIRI 2017**



# CHAIRS REPORT - PŪRONGO TIAMANA

An Annual General Meeting gives us the opportunity to reflect on the past year, matters progressed and goals realised. I present my first report as Chair of Karldon Trust feeling both privileged to be involved in such an organisation and challenged by the volume of need in our community that means the work of the Trust is far from over.

For the 2016-2017 financial year the Board continued to face challenges that are often faced by community health service providers. Board members are busy in their own personal and professional lives but always find time to not only attend regular meetings, but also to bring their expertise in developing and approving matters such as development of policy, setting strategic plans and supporting the tangata whai ora, employees and manager of the Trust. In particular we acknowledge the enormous amounts of energy contributed by the immediate past Chair, Linda Brislen.

On behalf of the Board I wish to acknowledge one of its longest serving trustees, Linda Brislen. Linda served the board for many years and has been both a board member and Chairperson. Her calm, common sense approach, personal integrity and kindness will be missed by us all. On behalf of the Board I thank Linda and her family for their support for Karldon Trust. Technically Linda passed away after the period of time that the AGM covers however Linda stood strong like the rata tree on behalf of Karldon and so we acknowledge her courage and tenacity to get the job done.

Every year the Trust faces the challenge of securing funding that provides quality care for tangata whai ora and remunerates our staff fairly. Negotiating fair remuneration from funders is always challenging and this year was no exception. The Board has set itself a goal of remunerating all employees at the level of the living wage. The Trust made some movement towards achieving this but we still have a long way to go.

At this time I would like to thank our accountants Accounting Gurus for their continued professional assistance to the Board and to the staff of Karldon.

The board and management of Karldon Trust have established a goal that is to be fully accredited by various agencies to for quality assurance and to ensure quality care. Karldon was subject to a number of audits including Te Wana and the visit of the HANZ auditors with each being passed with flying colours. I wish to commend Vicki and her team for their efforts and commitment to excellence in service delivery. Karldon is determined to provide best practice mental health care services to tangata whai ora and their families to support persons who may be vulnerable and in need of assistance.

Having considered the challenges faced, I would say that, without doubt, Karldon has met them all in a pragmatic and responsible manner. The Board has concentrated its focus on ensuring the best possible financial management and budgeting in a situation where contract funding has had almost zero growth.

During the year a number of staff were fare welled and others welcomed into the whanau. Those who moved on were Juliya Udhini, Gary Doidge and Anju Jacob. New staff were welcomed into the team this year and they include – Nor Leonor, Sheryl Iraia, Sally Hura, Shellah Ejusa and Anju Jacob. I, Jonathon Hagger was also welcomed onto the Board as a Trustee.

In saying thanks, I could not fail to mention the dedicated and dependable staff of Karldon who are so committed to the tangata whai ora they work with and make such a difference to the lives of those service users and their families. I also thank our office administrator, Sheryl Iraia. Without her hard work the work of Karldon could not be done or evaluated.



**Karldon Trust**  
KARLDON TRUST

I would also like to thank formally our General Manager, Vicki Greeks who is both the anchor and the pilot of our organisation. Her passion drives Karldon forward and her dedication holds the course. Karldon is incredibly blessed to have Vicki who gives so much of herself to her team.

I conclude my report by once again thanking all the employees and my fellow trustees for all their work during 2016-2017. There is still much to do, many tangata whai ora to support and care for in 2018 which will produce as many challenges as this past year has. The issues that come from mental health and addiction aren't going to go away overnight, but little by little, we can make a difference to the community we live in. Karldon has a proud track record of achieving this.

Jonathon Hagger, Chairperson Karldon Trust

February 2018

*"Vicki and members of Karldon Trust, very much appreciate the faith and passion you all exhibit in the daily running of the service you provide. Your integrity and homely values have been instrumental in bringing about confidence in its members. The opportunities to grow and mature in a safe and nurturing environment have boosted my and others mental well-being."*

Love, (Consumer name withheld)

*"Your time and support of our students is so appreciated. Thank you for supporting our students"*

Student Placement Coordinator, Tai Ohamai



**Karldon Trust**  
respect | hope | balance



# MANAGERS REPORT – PŪRONGO KAIWHAKAHAERE

*Hutia te rito o te harakeke, kei hea rā te kōmako e kō?*

*Kī mai ki ahau, he aha te mea nui o te Ao?*

*Māku e kī atu, he tangata, he tangata, he tangata*

Tēnā koutou katoa,

The 2016-2017 year was dominated by ministry of health certification, Te Wana accreditation and HealthShare audits and I am pleased to report the Trust passed with flying colours with both accreditation and MOH certification achieved for the next 3 years. Ensuring that the organisation is fit for purpose and that we continuously strive to improve service delivery to tangata whaiora is a prime focus, not only at audit time but on a day to day basis. This cannot be achieved without dedication from the whole team and that commitment is demonstrated throughout the governance group through to the management and staff. I would especially like to acknowledge the tangata whaiora for their patience, understanding and willingness to participate in these external reviews. Tangata whaiora are integral to the audit and review processes which involves attending whakatau (welcome), hui (meetings) and face to face interviews resulting in disruption to usual daily routines. Thank you to everyone who gives their time so graciously to this important process.

The reporting year also signaled the wrapping up of our five year strategic plan which we set ourselves back in 2012. This saw the culmination of a number of projects including the setting up of the organisations website and Facebook page; the management team review; the establishment of the Iwi advisory board and implementation of the Te Whare Tapa Whā Best Practice manual; governance training for Trustees; progress toward the Living Wage which is an objective from the workforce development plan and last but not least the establishment of the Home for Life service. The Home for Life accommodation in fact opened in December 2015 however I wish to mention it here in acknowledgement of all those involved in setting it up and in particular those tangata whaiora who were asked to make a significant change to their previous accommodation arrangements to allow this to happen. This move has freed up the Lodge for tangata whaiora with short to medium term support needs, a service that is working successfully.

The coming year and beyond will bring new and exciting challenges and I look forward to working with the trustees and kaumatua, the management team, staff, tangata whaiora and our community partners to further develop our organisation to one which is capable of consistently delivering high quality community mental health and addiction services to the community.

No reira, tēnā koutou, tēnā koutou katoa.

Vicki Greeks

February 2018

*"Ps. Our Sunday outing was a unanimous success. Karidon trust is nurturing a seed. Thank you for investing in our wellness (as) of being. Regards to all Staff"*

*Txt message from a consumer*



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Kaitiaki | Te Kaitiaki Take Kōwhiri

# OUR PEOPLE - TO TĀTOU IWI



## Jo's Story

Heard of the “Ripple on Effect?”

Well, involvement in Karldon Trust has opened doors for me. It's like being given a “second chance”.

In part, Karldon Trust works towards its tangata whaiora (client) accepting responsibility for our own choices – supporting awareness of others and strengthening bonds in our community. Karldon Trust offers me a safe place (ahurutanga) a place to stand.

The whanau based philosophy, upheld and evidenced in the day to day contact and skilled support people enables me to set and realise goals. The language heard at the Whare (Karldon Trust house) is life changing – for instance: through use of the phrase mental wellness of being. I am encouraged and heartened to accept personal responsibility for my own words and actions, to learn tino rangatiratanga. Employment is within reach.



The organisation skills, of lights on, washing done and kai plated up, as well as the structural functions of walking morning and evening to Karldon for medication, are two of the skills Karldon Trust engenders. Organising the basics and structuring my days have allowed me to relate to others with self-respect and confidence – learning Te whakakoha rangatiratanga (respectful relations).

The respect for the reality of my situation accorded to me by the trained staff at Karldon is enabling me to be all that I can be. It's a forum where day by day, step by step my goals are set and realised, with unwavering support from staff at the office, and into my community, my relationships with whanau and also to my friendships – Karldon Trust encourages me to network.

Eventually I will be able to self-medicate, to be fully employed and maintain loving friendships in that. Karldon Trust is instrumental in changing my outlook.

I hope you also can make that change.



**Karldon Trust**  
respect · help · re-emp

# GOVERNANCE AND STAFF - TE KĀWANATANGA ME NGĀ KAIMAHI

## CHAIRPERSON

Jonathon Hagger

## TRUSTEES

Diane Haronga

Jean Batt

Maria Oliver

Michele Thomas

## KAUMĀTUA

Anaru Bidols

Hariata Kereopa

Miriam Searancke

## MANAGEMENT AND STAFF

Vicki Greeks – Manager

Sheryl Iralia – Personal Assistant

Shirley Norton – Service Coordinator

Karen Anapu – Senior Support Worker

Glenn Wineera – Support Worker

Mary Folorunso – Support Worker



Michelle Schiller – Support Worker

Nor Leonor – Support Worker

Raman Deep Kaur – Support Worker

Sally Hura – Support Worker

Wendy Gray – Support Worker

 Linda Brislen 



Linda Brislen joined Karldon Trust as a Trustee in March 2010, before taking on the role of Chairperson in January 2012. Linda passed away suddenly in November 2017 following a short illness. She was still in the position of Chair on the Trust.



 RESPECTED FRIEND AND CHAMPION OF  
KARLDON TRUST 



**Karldon Trust**  
REACT \* CARE \* SUPPORT



# OUR PARTNERSHIPS - TO TĀTOU RANGAPŪ



TE ARATŪ TRUST



Post-Natal Therapy Services Ltd



BRAEMORE AND CANDID



Independent Living Choices

LOGAN & ROBERTS LTD











Karidon Trust

# STRATEGY AT A GLANCE - RAUTAKI I TE TITIRO




Our Vision is to build passionate, proactive and resourceful people

## ➤ How we will achieve our Vision

<b>Our Core Principles</b>					
	Service delivery relevant and appropriate to Māori	Service Delivery underpinned by Best Practice	Uphold the special relationship defined by Te Tiriti o Waitangi		
<b>Our Organisational Priorities</b>					
	Recovery based on Te Whare Tapa Whā	Financial stability	Robust organisation structure and systems	New and innovative services	Focus on positive health outcomes
	Workforce training and development				



# STATEMENT OF SERVICE PERFORMANCE OVERVIEW - TUHINGA O TE WHAKĀETANGA MAHI TIROHANGA WHĀNUI

 Housing and Recovery Service	 Adult Community Support Service	 Planned Respite Service
<p><b>7</b> admissions to the Lodge</p>	<p><b>4</b> admissions to the community support service</p>	<p><b>4</b> admissions to respite care (Lodge)</p>
<p><b>2,298</b> occupied bed days</p>	<p><b>5,975</b> occupied bed days</p>	<p><b>40</b> occupied bed days</p>
<p><b>102</b> days average length of stay</p>	<p><b>878</b> days average length of stay</p>	<p><b>6</b> days average length of stay</p>
<p><b>46%</b> Māori</p>	<p><b>55%</b> Māori</p>	<p><b>75%</b> Māori</p>
<p><b>54%</b> NZ European Pākehā/Other</p>	<p><b>45%</b> NZ European Pākehā/Other</p>	<p><b>25%</b> NZ European Pākehā/Other</p>

# STATEMENT OF SERVICE PERFORMANCE - TUHINGA O TE WHAKĀETANGA MAHI

The Karldon Trust

For the year ended 30 June 2017

## Description of Entity's Outcomes

Key objectives and outcomes Karldon Trust aims to achieve, influence and deliver include:

**Residential Service:** the client receives intensive support services during this phase and the focus is on safety and stabilizing of mental health symptoms until the person is feeling stronger and more resilient.

**Home-based Support:** the client lives at home either on their own or with significant others. Staff visit 7-days a week to provide services which may include medication support, assistance with daily living tasks, tenancy support as well as advocacy and advice

**Planned Respite:** short time spent in one of the Residential services when additional intensive support is required.

Referrals are received via the Lakes DHB Mental Health NASC service (Needs Assessment and Service Coordination). Our service is catered to Adults between the ages of 16 and 65 years old.

### Adult community support service

Number of admissions is 4

Number of occupied bed days is 5975

Number of suicides to current clients is 0

### Housing and recovery service

Number of admissions is 7

Number of occupied bed days is 2298

Number of suicides to current clients is 0

### Planned adult respite

Number of admissions is 4

Number of occupied bed days is 40

Number of suicides to current clients is 0



**Karldon Trust**  
resilient hope resilient

# Statement of Financial Performance

The Karldon Trust

For the year ended 30 June 2017

	Notes	2017	2016
		\$	\$
<b>Revenue</b>			
Revenue from providing goods and services	1	604,310	651,278
Interest, dividends and other investment revenue	1	113,522	113,456
<b>Total Revenue</b>		<b>717,832</b>	<b>764,734</b>
<b>Expenses</b>			
Volunteer and employee related costs	2	543,114	487,147
Costs related to providing goods or service	2	154,390	172,012
Grants and donations made	2	750	321
Other expenses	2	49,838	59,219
<b>Surplus for the Year</b>		<b>(30,260)</b>	



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TRUSTEES

# Statement of Financial Position

The Karlidon Trust  
As at 30 June 2017

	Notes	30 JUN 2017	30 JUN 2016
		\$	\$
<b>Assets</b>			
<b>Current Assets</b>			
Cash and Bank	3	12,029	54,854
Trade and other Receivables	3	8,394	11,426
Other Current Assets	3	43,076	43,040
<b>Total Current Assets</b>		<b>63,499</b>	<b>109,320</b>
<b>Non-Current Assets</b>			
Property, plant and Equipment	5	910,250	916,652
<b>Total Non-Current Assets</b>		<b>910,250</b>	<b>916,652</b>
<b>Total Assets</b>		<b>973,749</b>	<b>1,025,972</b>
<b>Liabilities</b>			
<b>Current Liabilities</b>			
Creditor and accrued expenses	4	23,240	30,664
Employee Entitlements	4	55,613	40,462
Loans	4	30,968	29,541
<b>Total Current Liabilities</b>		<b>109,821</b>	<b>100,667</b>
<b>Non-Current Liabilities</b>			
Loans	4	239,216	270,332
<b>Total Non-Current Liabilities</b>		<b>239,216</b>	<b>270,332</b>
<b>Total Liabilities</b>		<b>349,036</b>	<b>370,999</b>
<b>Net Assets</b>		<b>624,713</b>	<b>654,973</b>
<b>Equity</b>			
Equity	6	624,713	654,973
<b>Total Equity</b>		<b>624,713</b>	<b>654,973</b>

# Statement of Cash Flows

The Karlidon Trust  
As at 30 June 2017

	2017	2016
	\$	\$
<b>Cash flows from Operating Activities</b>		
Cash receipts from providing goods or services	719,514	762,381
Payments to suppliers and employees	(731,187)	(681,178)
Interest received	1,431	2,030
Interest Paid	(19,535)	(21,256)
<b>Total Cash Flows from Operating Activities</b>	<b>(11,777)</b>	<b>61,977</b>
<b>Cash Flows from Investing</b>		
Payments to acquire property, plant and equipment	0	(17,999)
<b>Cash Flows from Financing</b>	<b>(29,690)</b>	<b>(27,964)</b>
<b>Net Increase/(Decrease in Cash)</b>	<b>(41,467)</b>	<b>16,014</b>
<b>Cash Balances</b>		
Cash and cash equivalents at beginning of period	96,039	80,025
Cash and cash equivalents at end of period	54,572	96,039
<b>Net Change in Cash for period</b>	<b>(42,467)</b>	<b>16,014</b>



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real estate solutions