



New Zealand UP Education Trust

2016 Annual Report & Accounts

Prepared for Funders, Members & Partners

By the Board

February 2017



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1 Forward from the Board Chair.

Our evolving services have expanded year on year and Emma taking up 40 hours per week seems like such a logical and necessary step.

What we have seen is that given more time to deliver the possibilities seem endless and whatever services we offer to the membership they seem keen to participate.

Looking back on the celebrations of the 10 years of Up Club, some of our members gave moving speeches on what Up Club means to them in their daily lives – no pressure then. How impactful we are to the lives of members depends on how involved our members are, the choices they can influence and what is finally delivered.

The establishment of Seniors Leaders Forum was our step towards involving our members in the decision making process and a chance for them to see and understand just what is involved in the planning and funding of each event.

A happy outcome is also that our senior group is better connected, learning to listen and appreciate others opinions and that as in life you don't always get what you want.

A great example of how everyday life can be amended into a learning process with a planned educational outcome.

It does seem that each year I need to thank someone for what they brought to Up Club, usually as they are about to leave and this year is no exception. Emma resigned and the search for a new Youth Coordinator saw the Trust appoint Elsinore Crozier to the role.

We are always grateful for the input our Youth Workers bring to their roles and Emma has left a great legacy and we thank her for that.

The roles and needs we have to staff are also an evolving process and with the expanding services we have a need to focus sharply on funding, accounts management and operational oversight.

For this reason the Trust will divide the roles into a Funding and Operations role and Youth Coordinator role. Very different roles, while one focuses on the compliance and funding functions, the other the interactions and planning of events with members.

This change will allow us to grow, focus on expanding the services and the opportunities for our members to lead fully involved lives with loads of social activity.

Our plans for the coming year is a refresh of the imagery to better reflect who we are and what we do, a new financial reporting system and better connections via social media.

We can't do any of this without the considerable support from our youth workers team and the special input from our financial contributors who recognise and continue to support our vision.

Greg Rozen – Chairman.

2 The Board

Just like changes to our staffing there have been a few changes to the board with Lisa Sinclair moving to Auckland and Bridget Rees standing down. The Board can not really put into words the impact both Lisa and Bridget have had on the Trust – needless to say their participation has been substantial and hugely positive.

Bridget has been with the Trust from the beginning and has managed our financials since then – the depth of her knowledge and the dedication to her role as Secretary is legendary. Our intention is to now move to a fully cloud based financial system that will allow us to better manage the budgets, align funding and report to the Board on the present position. With our increased levels of funding it is important for us to report in detail to meet our statutory requirements.

We can also confirm that the move into Otago and Dunedin has been tracking well with the membership growing well, we are also pleased to report that some of these new members attending the annual camp long may this grow.

The main objectives for expansion into other regions is to grow the social networks for our members and connect more of our members to each other.

This year we also completed our Strategic Objectives, recording what our direction will be to act as a benchmark for everything we do. The strategy has been simply articulated so everyone can see our direction.

Whilst we have filled the role of Communications advisor we are still looking to fill new roles in IT development. Our IT Platforms are not keeping pace with changing social media nor are they potentially the best solution for our membership to access.

Whilst our immediate community understands what we do, the broader community is often unaware of our membership. We intend appointing external consultants to assist with these issues.

Board Members & Roles

Greg Rozen - Areas of Responsibility, Processes, Governance & Direction

Greg is a principal director at Beca Ltd and is the business market leader for its programme management business in the South Island. Greg has been the chair since 2011.

Ann Kofoed – Areas of Responsibility, Junior Group, Fund Raising Opportunities.

Ann joined the Board at the beginning of 2014 to transition Step UPP from the CDSA to the Trust's governance.

Alison Schroder - Areas of Responsibility, Education & Skills Programmes & Opportunities

Alison has over 19 years' experience of working with children who have language and communication difficulties (in New Zealand, England and Hong Kong) and has specialised in the area of social communication. Alison is the founder of "Socially Speaking" here in Christchurch and runs a successful consultancy service.

Ashleigh Stewart – Areas of responsibility, Communications.

Ashleigh is a journalist and has supported UP Club for some time in her role at the Press. Importantly she will bring insight into those forms of social connections we desperately need.

3 Programmes Delivered



3.1 Camp

The annual UP Club camp for 2015 was held Living springs. This was a great success and provided a perfect opportunity for members to gain greater independence and try new and challenging activities. The Club is always aiming to offer new experiences therefore 2017 will be held at Woodend camp.

3.2 Senior UPP Club (18 + Years)



- Continued growth in numbers
- Weekly Friday night events
- Opportunity for members to attend fun events, spend time with friends and make new ones. 2015 has seen a strong focus on including further educational

components into all events. For seniors this has been focused around developing events that foster independence, confidence and functional life skills such as money handling, planning,

problem solving, using public transport and cooking. The members are extremely enthusiastic about further developing their skills and are craving further independence, thus the introduction of further educational components into events has been well received.

3.2.1 Facebook – internet safety



The board have been keen to explore new and relevant ways for the membership to connect socially. A large sector of the teenage population does this via various social media platforms most predominantly

Facebook. Facebook if

used safely is a great way for members to access information about workshops, events and other information relevant to them. Safety and privacy however is always an ongoing concern in today's technological world. A fun and interactive information night was offered to seniors that covered internet safety and what information you should and shouldn't be giving out online. As well as covering how to use facebook and find information online.

3.2.2 Cooking Class

One of the key drivers for the Trust is enabling the members to manage their own lives and selecting what food to eat and how to prepare it. Cooking classes are run with all of our groups and are well attended by members of all ages. The focus of these classes is on cooking healthy meals that the members can cook predominantly themselves.

These cooking classes are predominately done through potluck dinners for the seniors where they prepare a meal themselves at home and then bring it along to the potluck to enjoy with friends.

3.2.3 Bus Challenge

The ability to use public transport is a fundamental skill for our members as they move towards independence. To foster these skills Emma and her team ran a number of bus challenge events through out the year with both the junior and senior groups. In these events members work in small groups to navigate their way from one location to the other using the bus schedules. Such events give members the opportunity to develop planning and problem solving skills while also practicing an important life skill..

3.2.4 Health Nights

Another important skill for independence and managing one's own life is the ability to take care of ones self, with a focus on "managing a healthy lifestyle". Members were introduced to these topics in a number of ways though out the year but most predominantly through the health night run by the Coordinator. Healthy eating nights cover the importance of a healthy diet and consequences of not eating healthy. Requiring members to consider their diet and where changes could be made.

3.2.5 Weekend Trips

Weekend trips away for Senior members continue to be a great success. In 2016 we wanted to expand the trips away offered to other areas of Canterbury. Therefore, 2016 trips included Hanmer. These weekend trips give members the opportunity to develop independence, planning skills and take more responsibility. Although staff attend to assist when needed planning of the trips is left largely to the members. With members being required to make meal bookings, plan a menu, plan the schedule and set times that they all need to be really and leave

by. Staff on these trips continue to be impressed by way members rise to the challenge and how quickly their skills develop from these trips.

3.3 Junior UP Club (14+ years)

Clearly evident improvements have been seen in many of our Junior members this year particularly in areas such as social skills, confidence and functional life skills such as money handling. As with the seniors we continue to offer fun events where members can spend time with friends. But again in the past year we have put a strong emphasis on developing events that include educational components to foster the development of both social skills, confidence and functional life skills. For the Juniors educational components have centred around developing social skills, speaking in large groups, confidence and life skills such as using public transport and money handling.

3.3.1 Splinter Group Events

Splinter group events are run for both junior and senior groups and continue to be a great success.

The specific aim of these groups is to better reflect what their peers do; small groups going out for typical social interactions. These smaller groups require members to interact socially as hiding in the crowd is less of an option. Youth workers support each group to ensure they remain on track and facilitate when things get tricky.

The great advantage of these events is that they take place on the alternate week of the main group event, so there is effectively something for members to attend each.

The types of activities are just what you might expect of their peers, meeting at a pub/restaurant/café, shopping or going to a sports game or show. We have been heartened by the support shown to members attending public events – breaking down the barriers for our members.

3.4 Step UP (8 – 13 years)

2016 marked the 3rd year of the Step UPP group being under the governance of UPP Club, after taking over the group in 2014. The move from being previously parent run to now being run by youth workers under UPP Clubs governance has meant that over the past year both members and parents have had the opportunity to gain independence. Majority of parents now drop members off and then collect them at the end. The opportunity for these young members to spend time with peers without parents in a supportive environment has led to huge improvements in their independence, confidence and social skills. With the inclusion of more educational components around social skill development planned for 2016, we expect to see these great improvements continue.

3.5 Dunedin UP Club

The end of 2016 marks two years of Dunedin UPP Club. This past year has seen a steady rise in membership numbers and feedback on the group has been very positive. The Dunedin Club meets on a fortnightly basis and similar events to the Christchurch program are run with the same focus on the inclusion of educational components. We hope to further expand this group and the events offered in 2017.ame focus on the inclusion of educational components.

3.6 Holiday programme

Holiday programmes continue to be a great success and have all been well attended throughout 2016. Activities this year included the Antarctic Centre, Museum, Botanic gardens, Inflatable world, mini golf and many other fun activities at our base location and around the community. We have received great feedback from both parents and members about the holiday fun days and will continue to run these again in 2017.

3.7 Fitness Programme

Maintaining a healthy weight and keeping active is something that many of our members struggle with. The board has therefore identified that offering accessible fitness opportunities for our members is a key concern. To help address this need we trailed a 6-week “healthy lifestyle” programme with our senior members in 2016. Sessions consisted of how physical activities improve health and the importance of sleep and how to manage a healthy life style. The sessions were extremely well received by members and in 2016 we will be running a number of 6-week block sessions of the fitness programme. We will also be expanding to offer the sessions to both the junior and senior members. In addition to the fitness program 2016 we also included sports nights.



4 Focus Areas for 2017

For 2017 the Board has developed a strategic plan for each age group. This describes the objectives we are aiming to achieve and what actions we going to need to put in place to realise these - and importantly how are we going to measure success.

This will bring the objectives of the Trust into clear vision and assist Gemma with the delivery of these objectives.

4.1 Gaining greater digital connections.

The Board has observed that in recent years both our members and the greater community have become more digitally connected, We are making great steps towards reaching out digitally to our wider community.

Whilst members have varying abilities around the use of facebook and interaction with our website, the broader community needs to be able to find us, hear from us and our members. We are opening new technology doors in launching a new website, being connected on linkedin and raising social profile on most social media.

Again this coming year will see the Trust actively explore the options and will be calling for support from suitably qualified individuals to help us build a strategy around the ever growing IT needs.

4.2 Raising greater awareness of the Trust & UPP Club with the broader community.

In the past a website was all that was needed, but now we do need to be visible, proactive in our communications and easy to connect with.

This is especially important to raise awareness of who we are, what our membership is striving to achieve and that we do welcome outside support in many forms.

By raising our profile and gaining greater awareness of our needs and what our membership can bring to the community we could realise tangible benefits for our members.

These benefits could result in supporting greater opportunities for members in schooling, social activities and hopefully in securing paid employment.

To date we have explored all options to raising our profile in the business community where those job opportunities might be. A coordinated approach could lead to the opening of many doors for members.

The Trust has secured people with passion for our cause who has considerable experience in the area of communications who could provide sound technical advice on developing a communications plan and supporting its delivery.

4.3 Further development of educational components.

The core function will always remain the same – being a social group in which members can attend and have fun with friends, while also making new ones. The board does however recognise the importance of also setting these individuals up for fulfilling lives in the long term. Lives in which they are out there engaging in the community, with the greatest level of independence possible and having meaningful interactions just like anyone else.

It has been our main focus over the years with stronger strategic objectives to implement more educational components to our programs is therefore important that alongside providing fun social outing we are also incorporating educational components into all events to help foster the social and functional life skills required for our members to achieve this. We are in better position to seek input from professionals in the area including the professionals on our board which include a speech

and language therapist and child psychologist as to how these specific objectives can be achieved.

4.4 Additional programmes

2016 has been a year of expansion for the club, with this expansion of programmes offered to continue in 2017. The expansion of programmes is important to keep up with demand and ensure we are offering programmes that meet member's needs.

4.5 Money Skills Programme

One area that our members have great difficulty with is money skills and money handling. Elsinore is currently working on a money skills program that is practical and hands on by role play and trips to the supermarkets and using checkouts to bring awareness to the cost of day to day living. This program will be set to be rolled out in 2016 and into the 2017 year and will give junior and senior members the opportunity to further develop and practice money skills.

4.6 Independent Living Skills Programme

Our key focus is always to assist members in developing important social and life skills required for them to live fulfilling lives within the community, with the greatest level of independence possible. Developing this independence is a key focus and something we incorporate into all events. To further target key skills required for independent living we intend to run an independent living programme. This is to cover skills such as cooking, cleaning, health and using public transport

4.7 Understanding awareness in the community and job Prospects

Our 2017 objectives is further stretch their social awareness in their wider community by introducing them to places like rest homes and other potential job opportunities six different prospects will be explored this year connecting them potential employers it gives them the experience and opportunity to see what options are available to them and what they might enjoy in future.



4.8 Financial Report

Each year I address a summary of the financial position of the Trust and what it is we have delivered in that year.

It is however best to commence with a recognition that UP Club has and continues to grow its membership base - currently around 116 members. It may seem that the membership numbers have stabilized, but with continued growth we continue to require a higher demand of funding.

Our annual cost to operate also continues to climb and a grant of \$45,000 (2015), is no longer sufficient to meet our needs. Membership fee contributions whilst an important source of revenue accounts for less than 5% of our operating expenditure, a fall of 1% from last year.

Our annual funding income needs to exceed \$120,000 to keep all of the activities of the Trust viable. This does represent a substantial commitment from a wide body of community supporters and falls to the role of the Operations and funding manager to secure.

Many events are also supported by the membership and that is acknowledged by the Trust Board, but to achieve the level of support our members need around social activities we do need to secure and pay support workers. Whilst many organisations operate on the basis of volunteer help we have always held that our members need knowledgeable support to facilitate community based events. Our objective is always that this support can be withdrawn when members have gained the skills and confidence to initiate social activities independently.

All of our events have an educational component designed to improve our members capabilities – which differs greatly from organising an event.

In any given week our members enjoy the opportunity to take part in social activities specifically tailored to their needs – the number of events has also grown to 141 Programs per annum.

Just like their teenage peer group we strive to provide our members with the opportunity to have social activities and stop the isolation.

We have limited opportunities to secure funding due to our focus on Down Syndrome and the need to fund our support workers. By broadening our search and raising awareness we remain confident the Trust can continue to secure financial support.

Our financial year runs from the 1st July to the 31st of June annually: please find attached a set of our latest accounts.

Our annual expenditure is currently running at around \$119,000 and for 2017 we are projecting an operating cost over \$125,000.

We must respectfully acknowledge and be thankful for the on-going support provided by our current funding agencies, Community Organisation Grants Scheme (COGS), New Zealand Lotteries, and the Canterbury Community Trust (Rata Foundation). Mainland Foundation and Pub Charity.

Annually the Trust posts these financial accounts on the Charity Commissions website for public knowledge as is required by the Commission. Please find attached our annual financial report for 2016.

