

OUR YEAR IN REVIEW 2019



...taikuratrust
valuing difference and
supporting inclusion

HE KARERE MAI I TE KAI-ARATAKI

A MESSAGE FROM OUR CHAIR AND CEO



You must be wondering if Taikura Trust has an odd sense of timing to release a Year in Review right now. Our plan was to share this report earlier this year, and then COVID-19 happened. At first, in just one part of the globe, then across continents, and finally in God's Own Country.

Taikura Trust is identified as an essential service provider by Government, so a few days before lockdown, our COVID-19 Management Planning Team was elbows deep in working to give certainty to people during a challenging time. Needless to say, we'll dedicate a few pages (or more!) about our communities' COVID-19 experiences in our 2020 year in review. In the meantime, I ask you to indulge this koro, as we shine a light onto the past so we can have a better understanding of how the future may unfold.

2019 has been an incredibly productive year for Taikura Trust. It was the second year of our investment programme to align our strategy to the Enabling Good Lives principles. The Board agreed to draw from our limited reserves to do so, and we are looking closely at the outcomes.

I might add this move enabled Taikura to respond flexibly to the COVID-19 crisis.

As the needs assessment and service coordination (NASC) provider for Auckland, we continue to serve the largest population of people with disabilities in New Zealand. The reality is we must manage the significant needs of our growing communities against limited resources.

As you'll see in the following pages, our Chief Executive and employees have been successful in working within the constraints of the sector. They explore, test and provide alternative ways to bring certainty to the lives of disabled people, their families and whānau. They want to see people included in their communities and able to participate and contribute to their potential. The team has undertaken a significant change programme to strengthen organisational capability, so we can respond better to people who want more flexibility, choice and control over their supports. They have worked comprehensively to set up flexible solutions to be available and responsive to communities wherever they may be. This has been tested during COVID-19 alert level 4 as they worked in stride and in sync with one another, clients, providers and other agencies.

The Board continues to take prudent steps to manage its governance obligations. Taikura achieved another unqualified financial audit of its systems and processes, and continued to meet all legislative requirements, such as health and safety. 2019 marked my second year as Chair and I acknowledge our teams and my fellow board members for their outstanding commitment in delivering outcomes for people.

Tracy Walters
Board Chair



When I first wrote this introduction, it was early February 2020. Well, a lot has changed since then! And not just for Taikura but for the whole world. Given the COVID-19 crisis we were tempted to completely revise this Year in Review document. We also discussed not releasing it at all. But we thought no, it's important to provide this summary of 2019 and to reflect and celebrate the great work Taikura, its people and partners achieved during 2019. 2020 is already proving to be very different. We are up for the challenge and look forward to continuing to support our clients, carers, families, whānau and our sector partners.

Without further ado, welcome to our Year in Review report. I'm proud to say that 2019 represents 17 years of service. When we first opened our doors in 2002, we served just over 4,000 clients. Looking back over 2019, we have provided advice, support and access to funding for over 12,000 people and their whānau, and worked alongside service providers, government agencies, and many community organisations and partners. The routine audit by the Ministry of Health (MOH) last year affirmed the quality of our services.

As well as delivering disability support services on behalf of the MOH, we extended our services to people supported through ACC. We have added the ACC Living my Life and Way Finders Navigation services to our operation. This has given us the opportunity to fulfill our ambition to support all disabled people irrespective of the cause of their disability and contribute to improving equity of access for people and their families.

To explore how we can play our role in transforming the system, we reviewed our organisation and in 2019 initiated significant changes. Our purpose is to offer greater choice to our clients about how we support them, and to make us a more efficient and responsive service. We started to share the outcomes with our funders late last year. Other Government agencies are interested in what we can offer because the Enabling Good Lives (EGL) principles are relevant for all communities who need support. Resourcing will be important to maintain the improvements we have made long term; however, our first priority is being granted greater flexibility in how we can work, and in the supports we can offer people in Auckland, so we can make better use of what we have.

Our team members continue to bring their knowledge, skill and passion for making a difference. I'm looking forward to working through the challenges and seizing opportunities to provide the best possible services to the communities of Auckland and to the people and families we support.

Sonia Hawea
Chief Executive Officer

TE ROOPU TIMU WHAKARAI

OUR EXECUTIVE MANAGEMENT TEAM



Sonia Hawea
Chief Executive Officer



Rachelle Rogers
Head
People and Culture



Sally Clark
Manager
Supports and Resources



Kelly Norton-Matthews
Manager
Managed Supports



Peter Hoskin
Manager
Community Engagement



Shelley Jones
Executive Assistant

OUR VISION, MISSION AND VALUES

Our vision is an Aotearoa New Zealand where people of all disabilities and diversity flourish and achieve their full potential.

Our mission is to work in partnership with disabled people, their families and our communities to initiate, promote and implement actions that enable people to live the life they choose.



Aroha
We embrace difference and
value human life in all its
richness and diversity



Pono
We believe all successful
partnerships are built on
trust



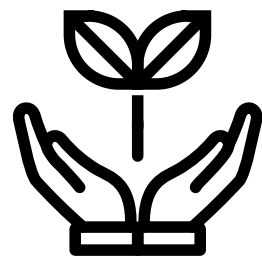
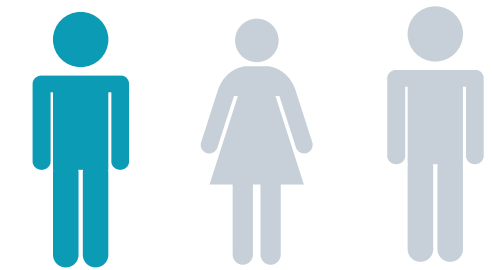
Rangatiratanga
We will work as a confident
guide and take positive
action that brings certainty
to the lives of people, their
families and whānau



Tika
Our sole purpose is to serve
and support people with
disabilities

#1 Largest
needs assessment service
coordination provider in NZ

1 in 3 people
in New Zealand
receiving disability services are supported by us



Contracted funding
managed on behalf
of Ministry of Health

\$260m



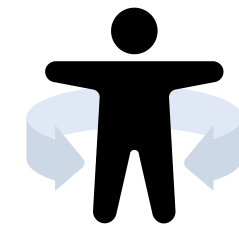
Referrals received

2443*



Assessments
made

3327*



Service coordinations
completed

9113*



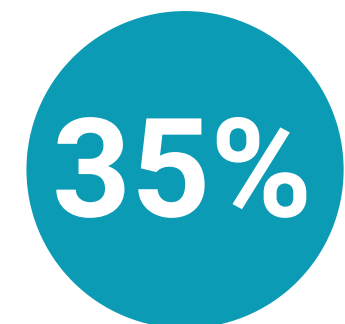
Over 80%
client issues
resolved after
first contact ^



70 full-time
equivalent (FTE)
employees
throughout
Auckland



We collaborate
with over 280
MOH contracted
providers

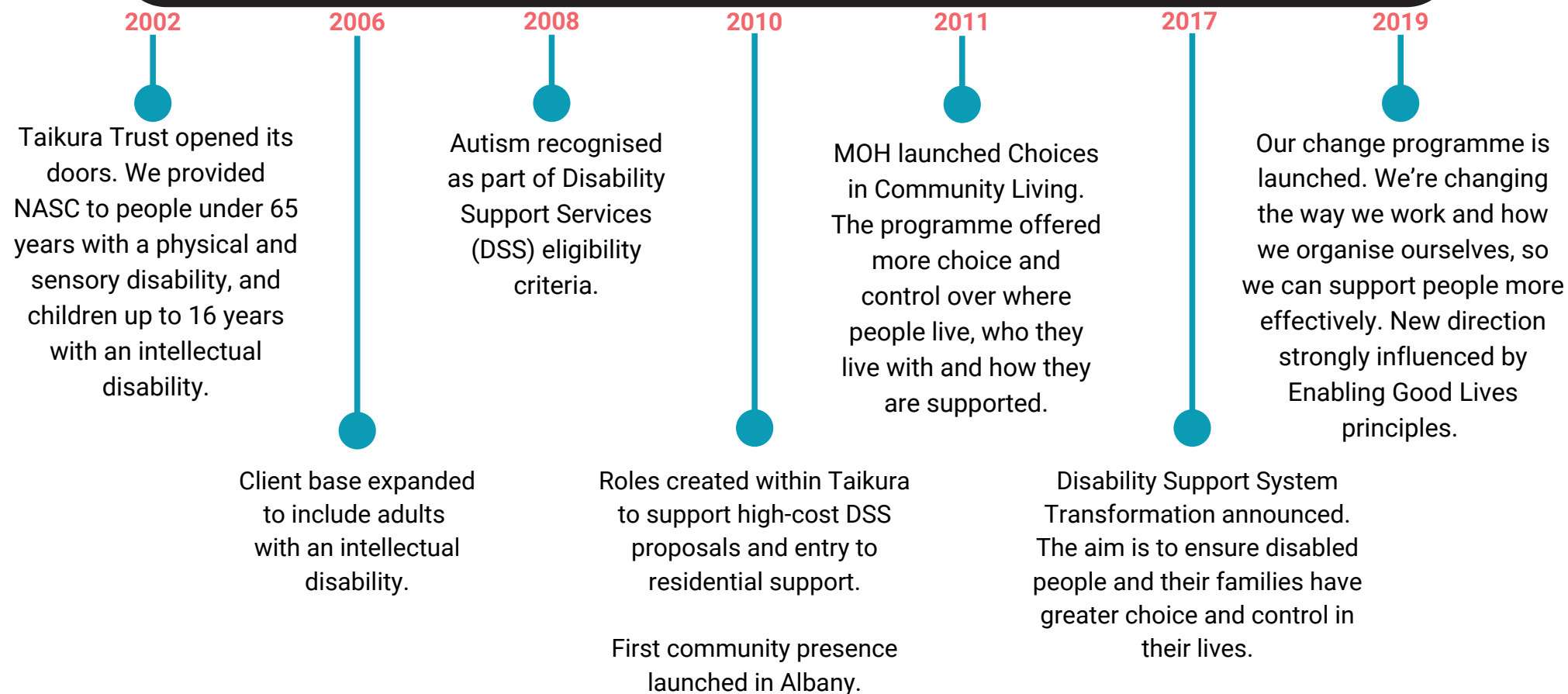


Of our clients have
autism spectrum
disorder

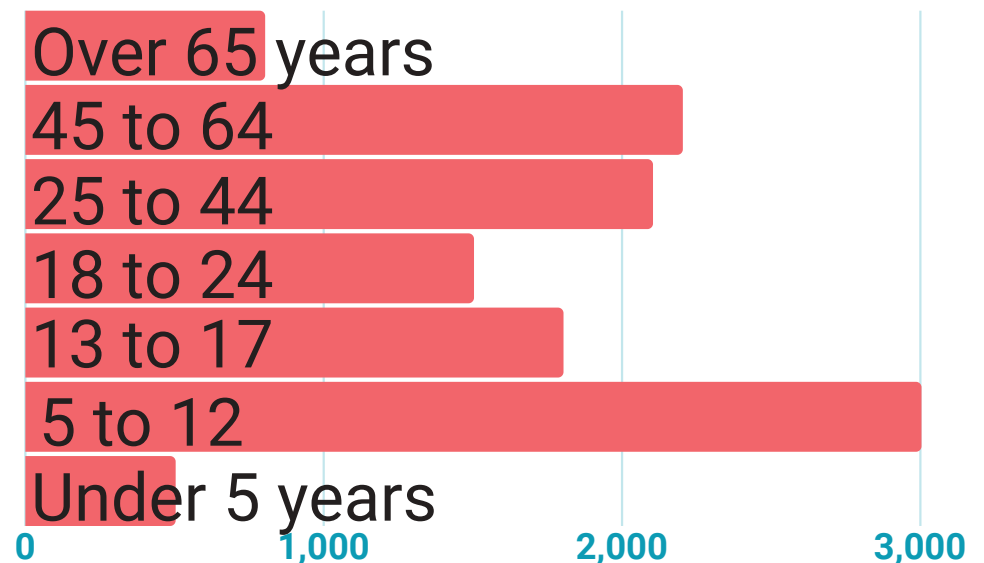
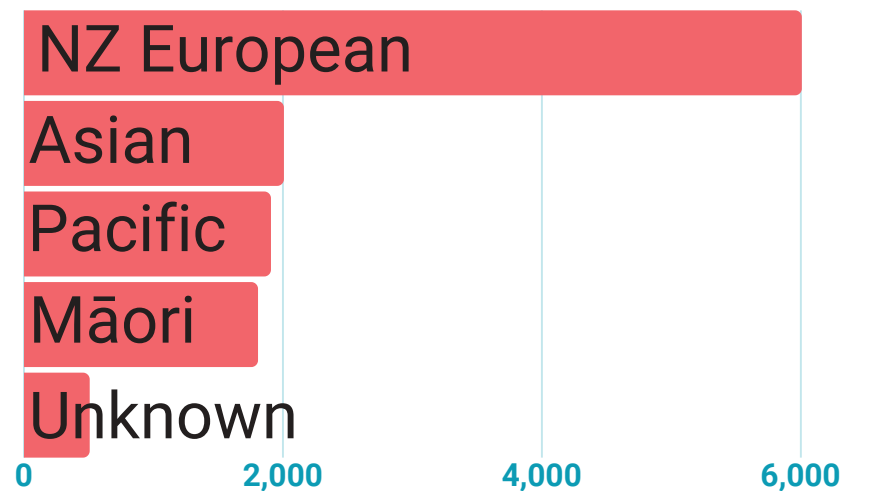
* For 2019

^ For our Way Finders service

17 years of service



Client demographic





HE ARA HOU O TE MAHI

A NEW WAY OF WORKING

From a people and culture perspective, 2019 has been a year full of change and innovation for us. We introduced a Behavioural Competency Framework which forms the backbone of our talent strategy. Assessment Centre methodology is used to evaluate a candidate's ability to demonstrate the behavioural competencies needed for the role. This has enabled us to recruit and develop the leadership and service capability that we need as we evolve into a more flexible organisation, where Enabling Good Lives principles are at the heart of the design.

Our overhauled induction process shifts the focus from traditional training to a blended learning approach, which has a strong focus on coaching, mentoring and on-the-job learning.

We've formed new teams enabling us to move away from a one-size-fits-all approach, towards an organisation where our clients have more choice and control over how they receive our services, and where our client outcomes are a more prominent measure of success.

Our Just Culture Framework holds us accountable for continuous improvement. It helps us analyse issues and take appropriate action when things go wrong, as they sometimes do. It gives us the framework and tools to ensure that we are consistent and that we are responding to the right challenges, in the right way. Our regular People and Culture Clinics give our people another channel for information and support beyond our already well-established Peer Mentoring and Employee Assistance Programmes and the external supervision that is made available to all staff.

ACCESSIBILITY TICK AWARD

We were awarded the Accessibility Tick by Access Advisors as a mark of assurance that we are focusing on inclusion and diversity in our workplace.

We're the first disability organisation in New Zealand to be presented with the Accessibility Tick—a deeply meaningful milestone for us because our organisation was founded on the values of inclusion and diversity. It's a reminder to ourselves that it was bold thinking and action that started the organisation and the same bold thinking and action will take us forward.

New Zealand has 228,000 disabled people of working age who are not employed. Of those, 75% want to work—that's over 170,000 people. At Taikura, we want to help increase economic independence for disabled people and their families because this brings choice and opportunities to contribute and participate in society.

We worked with Access Advisors, a pan-disability initiative with deep ties to the Royal New Zealand Foundation of the Blind. As custodians of the Accessibility Tick, they've done a comprehensive accessibility review on our policies, systems, physical workplace and services. Our partnership with them is ongoing.

The road towards getting the Accessibility Tick included making significant changes to our recruitment and selection processes; undertaking a physical environment accessibility audit of our office and rolling out unconscious bias training for our leadership team. These measures enable us to attract, welcome, support and retain diverse talent that includes people with access needs.

The deliberate infusion of diversity and inclusion across our operations, and in our engagement with people, complements our aspiration of becoming an employer of choice for people with lived experience of disability.

UNCONSCIOUS BIAS TRAINING

We ran unconscious bias training for people in the organisation who recruit, supervise employees, or influence the design of our services. The training was designed to increase awareness and understanding of how our biases affect the way we relate to one another, make decisions and provide services to people in the community.

Recognising our biases means that we don't miss out on creating a genuinely inclusive and diverse workplace. It also allows us to develop policies and practices that are flexible to the needs of our people and clients, instead of the one-size-fits-all approach.

We believe that an inclusive and diverse organisation creates a supportive and innovative workplace not just for people with disabilities but for all of our employees.





TE HERENGA KI NGA HAPORI

CONNECTING WITH COMMUNITIES

We held our first Tuhono ki Marae hui at the Manurewa Marae. Our Board of Trustees, led by our Chair Tracy Walters, and supported by our kaumatua Brownie Rauwhero, joined with our CEO and Māori Development Team. The korero from the whānau who gave their time to attend the hui was clear – we need to be able to work with whānau in a Māori-centric way across all our processes and in our practices. We heard the following messages:

- It's essential to get the first contact right. Make time to whakawhanaungatanga.
- Make the process and practice work for the person and their whānau, not the other way around.
- Value te reo and tikanga Māori in all processes, and be competent and confident to respond to cultural preferences and concepts of wellbeing.

With this korero, we're challenging ourselves to step up. We want to learn, do and review, and repeat as we go. We'll continue to hui with Māori and Māori partner organisations. Our values of aroha, pono, tika and rangatiratanga are the guiding principles for our thoughts and actions. Our kaumatua will guide, challenge and support us.

TE FONO

Around 180 Pacific people attended our three-day series of fono in September 2019, held in three locations across Auckland. It was our biggest talanoa with Pacific disabled people, carers and families, and we ensured inclusion and accessibility were at the forefront of our event planning.

The fono was about understanding how Pacific families experience our service, as well as broadening their awareness of disability supports.

We invited Pacific individuals and families to share their stories about their journey living with a disability; caring for someone with an impairment; navigating health and social services; and how they're figuring out their relationship with service providers like us.

At the fono, it was reinforced that people experience disability supports through their cultural lens. Cultural factors such as the language used, how people are approached, what disability means in the family, and the appropriateness of support options, will all impact on the success of the engagement, and ultimately whether people will take up the support.

We used graphic facilitation, led by a Pacific person who used disability supports, to engage with the participants. The participants responded well to the approach: it was informal; visually appealing and relatable.

This gave the attendees the chance to listen and observe, and to see us working in a different way to what they had experienced. Clients and families also heard the speakers challenge us and saw that we wanted to hear the bad stuff, as well as the good.

TOFA MAMAO

Tofa mamao is the term used by chiefs and orators from some Pacific nations when describing a vision based on forward thinking, while being guided by the wisdom of the past.

Alongside PIASS Trust, we supported the formation of Tofa Mamao, a collective of Pacific disabled people, families and carers from across Auckland. Tofa Mamao's aim is to advance the voice of Pacific disabled people and their families in all sectors of society, ensuring that lived experience is valued and respected. It is a grassroots independent collective with an approach underpinned by the principles of Enabling Good Lives.

Our ties with Tofa Mamao will ensure that we value the unique views of Pacific people and that their voices influence us in how we improve our services. For example, we tapped into their experiences around finding work in Auckland, as part of our Employer of Choice project.

We also collaborated with them to deliver Te Fono, which was made possible through the Le Va Faiva Ora Community Innovation Fund.



AN EXTENDED STAY

When Lupu was a baby, his mother asked his tina (grandma) and tama (granddad) to babysit him for a few hours. She never came back for Lupu. His father, on the other hand, had decided to start another family. With no one else willing and able to care for Lupu, his grandparents decided to step up to the role as his carers.

Lupu was four years old when he was diagnosed with global developmental delay, autism spectrum disorder, and later on, an intellectual disability. His Samoan grandparents found it hard to come to terms with a disability that they couldn't 'see'. Following a needs assessment with us, we talked about the supports and services available to them. However, tina and tama declined them, as they were unable to understand the significance of the allocated supports, and insisted they were all Lupu needed.

We want to be sure that someone will look
after our grandchild when we are gone.

Lupu's teenage years were a turning point for his grandparents. He started to isolate himself, was easily distressed and displayed violent behaviour that was hard for two elderly grandparents to manage on their own. Not surprisingly, tina and tama started to take on Lupu's self-isolating behaviour. They stopped inviting people over so as not to upset Lupu. They lost touch with friends, and found it difficult to ask for or accept any support. They all felt alone in their journey.

We re-assigned Lupu and his grandparents to one of our Pacific support facilitators. Having the same cultural references and our support facilitator's responsiveness slowly encouraged tina and tama to open up to us. They began to reconsider the supports available to them, and crucially, realised the need to someday have that difficult conversation with other family members about Lupu's future. They just wanted assurance that the love and time they've put into caring for Lupu will go on, even when they're gone.

Our support facilitator continued using a cultural approach on Lupu and advocated for a Pacific behaviour specialist for him. He responded well to his buddy, who used culturally appropriate techniques to engage him. A milestone moment was when tina and tama finally accessed respite for Lupu a few days every month. This gave all three a much-needed break.

Lupu is now 18 years old and the next few years will be crucial in preparing a stable life for him. While we are paving the way for a residential placement for Lupu, the family is in for a long wait. Until then, we will continue to journey with Lupu and his grandparents towards their goal of having greater certainty in their lives.



TA MATOU RATONGA

OUR NEW SERVICE OFFERINGS

People with disabilities and their families tell us daily what they want to see in their communities and for their families. We hear about the barriers they experience in being able to fully participate as members of the community. People are seeking equity around accessible housing, healthcare and education, as well as more flexible support and employment opportunities.

We recognise that we are in a unique position to understand and respond to the needs of vulnerable people beyond Ministry of Health funded support. Complementing this is our skilled workforce who have experiences, connections, relationships and the willingness to offer more than needs assessment and service coordination.

We welcome the need to be agile and flexible against a changing landscape wherein the people and families at the heart of these conversations are wanting more flexibility, choice and control.

PATH AND MAP FACILITATION

Our experience has shown that some people are reluctant to share personal information and find the standard needs assessment tool inflexible. So we rolled out Path and Map facilitation as direct responses to people who want other options to work with us.

Path and Map facilitation use pictures to help people explore what's important to them, identify their goals and reveal what their journey might look like. Both are typically done by a facilitator who guides a person throughout the process and an illustrator who graphically depicts the person's vision.

Our clients who have used PATH and Map find the process more enticing and supportive. By the end of the process, they have a huge visual PATH plan that has roles, responsibilities, expectations and a clear view into their future. They can experience a great sense of accomplishment and a renewed drive and focus to keep moving forward until they attain their goals.

Before rolling out PATH and Map, we made sure that our employees were trained on the process alongside clients, so we can tease out early on any challenges people with disabilities may have around using the tools. We're in a unique position here at Taikura because our facilitators come from different teams within the organisation, bringing with them their own expertise and flavour of customer-centrism into the experience.

WAY FINDERS

Way Finders is a national navigation service funded by ACC that provides free and independent guidance and information to people with ACC claims.

We deliver this service in partnership with Specialist Rehab Services. Our partnership with them is based on our shared values and brings together two organisations with different but complementary areas of skills and expertise.

Since Way Finders was launched in early September 2019, more than 400 ACC clients have accessed the service. For now, most people find out about Way Finders when they receive their decision letter from

ACC, which encourages them to contact a navigation service if they need support. The queries received by the Way Finders navigators have been complex and unique to each individual. Often callers are distressed, and it can take a long time to work through the situation. Our growing team of navigators are skilled communicators who effectively build rapport and trust with a caller, then gradually unpack the issues. Among ACC claimants are people with disabilities and families and others caring for people with disabilities.

Way Finders is an exciting and important development in our plans for growth, as we explore more ways to serve our communities and particularly people with disabilities.

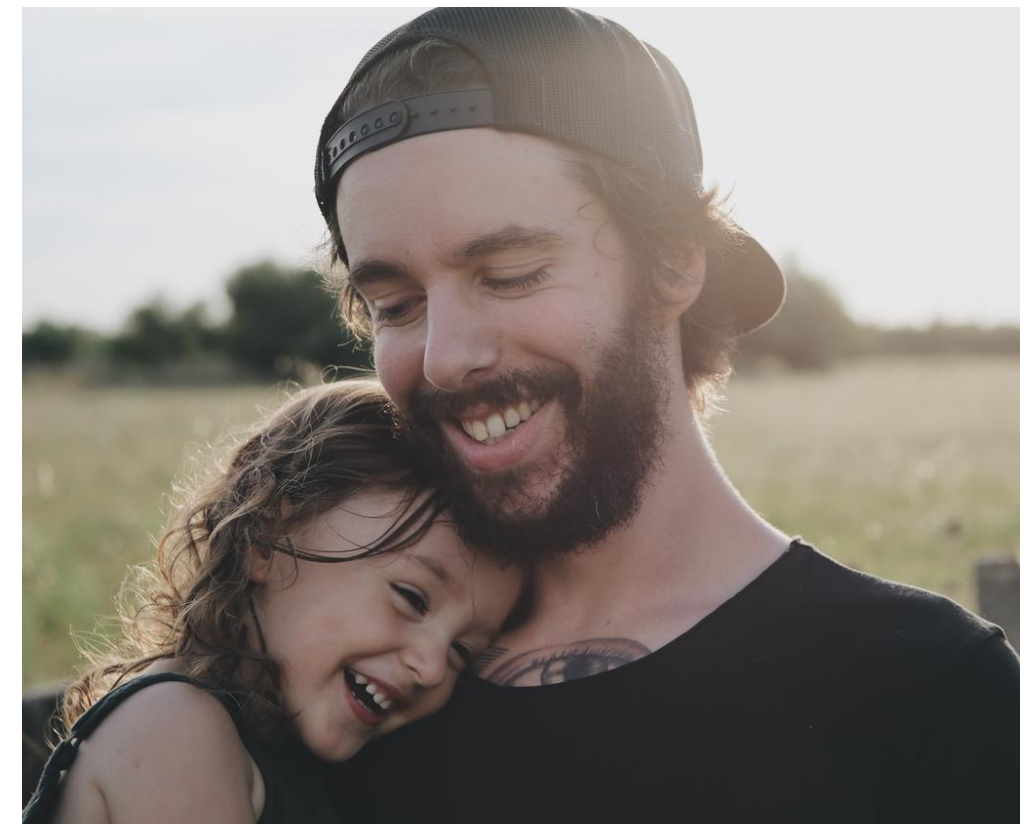
LIVING MY LIFE

Last year we embarked on our first partnership with ACC when they contracted us to deliver two ACC Living My Life services: Facilitated Pathway Map and Coaching to Self-Manage.

Living my Life is a new service designed to promote self-determination for ACC clients by providing them with more support, choice, control and flexibility.

We use visual planning to draw out a person's aspirations and goals, and open a world of opportunities for them.

We can also determine a client's readiness to self-manage, or develop their skills, so they can manage their own services and supports. We offer Living My Life to eligible ACC clients in Auckland, Kaipara, Whangarei and the Far North District.



MOANA'S CHOICE

Moana was in her late 50s when she had a severe stroke. She also lived with multiple health issues, and these inevitably led to a medical-centric approach in supporting Moana. Her healthcare team endorsed a placement in a private hospital, but it didn't take very long before Moana demonstrated her unhappiness with the situation. Her family bore the brunt of Moana's anxiety—she increasingly disengaged from them until the relationship soured. At the height of Moana's discontent, she assaulted a hospital staff member. The hospital decided it was time for Moana to stay elsewhere.

Our intensive service coordinator (ISC) conducted an urgent needs assessment for Moana for a new residential placement. At first, Moana only revealed her frustrations but not what she wanted to change. Our ISC encouraged Moana to talk about what a good life looks like to her—recurring themes quickly surfaced: *choice, control, live my life the way I want to, self-esteem*. After a few days, our ISC came back to Moana, her medical team and family and suggested that they give Choices in Community Living a try. This would mean that Moana would have more control over where she lived and who supported her. Moana said yes to the prospect of independence in a heartbeat.

I want to have control over the kind of life
I want to live.

Without stalling the momentum, a concerted effort took place between us, Renaissance, DHB, Housing NZ and even Moana's estranged family towards finding a place for Moana while still meeting her high medical needs. After a hectic and emotional transition, Moana finally found a new home with all her supports in place. In a matter of months, an amazing transformation took place. Moana's health improved, she started taking short computer courses, and reconnected with her children and her wee grandchildren.

Moana can't believe the stark difference between her life now and a year ago. She's a true example of how a holistic approach is one of the best ways to meet a person's needs across the spectrum of health and social care services.

TE WHAKAHOKI TAUTOKO

GIVING BACK

HALBERG GAMES

More than 200 volunteers joined the 2019 Halberg Games, including a few of our very own people, and helped with the smooth delivery of the games.

We were thrilled to be part of the annual sporting event for young people with disabilities or chronic illness. The event marked a milestone moment for the community when NZ Sport launched its disability plan at the games' opening day. The plan includes the increase of Government funding for active recreation and sports from \$6M to \$13M, targeted at providing more quality opportunities for people with impairments, so they can have a better sporting experience.

We're committed to supporting our employees to participate in amazing events that allow people with disabilities to shine.



NZME SPECIAL CHILDREN'S CHRISTMAS PARTY

The Special Children's Christmas Party started in 2004 to bring holiday joy to children who have a **life-threatening illness, physical or intellectual impairment, have experienced domestic violence, or are living in underprivileged circumstances.**

We've been involved with the event for over a decade now and we supported them again through sponsorship. Our donation helps fund their amazing lineup of celebrity stage shows, fun rides, interactive games, plenty of delicious food, face painting plus other activities, and of course, gifts which every child at the party takes home.



FESTIVE SEASON HAMPERS

Every December, we start a food drive to help families in need have a memorable festive season.

The yearly tradition is a response to our employees who feel moved by the stories of the people we support, and want to help outside their role as service facilitators. Our employees get a chance to nominate a family to receive one of six hampers we prepare. All hampers are funded by employee donations.

OPENING OUR DOORS

At our Mount Wellington office, we hosted a workshop looking at the **Māori perspective on the changes to the Vulnerable Children's Act and the space that Oranga Tamariki operates in.**

The workshop focused on the recent changes to the Act, particularly around removing children from family members. Our participation in a collective of Māori service providers working in the Oranga Tamariki and family harm spaces gave us the opportunity to host and participate in the event. The collective was created to engage with the CEO for Oranga Tamariki with regard to her responsibilities under Section 7AA of the new legislation.

URUPARE FEEDBACK

Here's a selection of feedback received from our clients over the past year.

"Your support facilitator made me feel **positive** and happy. Once he left I called my husband and said 'I love our beautiful, mad family'. I felt that I could go on with **hope** that things will be fine. He was very understanding, kind and professional. And it's people like him that **make us mums feel like we are doing OK** and we will learn and grow alongside our child. Your support facilitator is a credit to your team and company."

"Your service facilitator was very **approachable**. I found myself rambling on a lot about our situation. But she was very **patient**, even if I was straying from the questions related to the assessment."

"I didn't find the process easy as I'm grieving our daughter's recent diagnosis. Things were raw and reality hit quite hard after the assessment when there was time to reflect on the questions asked. But I can't imagine the assessment going any better."

"At some point I asked to have a break. When we returned I said out loud my appreciation. I told her she has the right heart for her job and that she was doing great. She was so natural and made us feel **more comfortable** with the whole process."

"It was probably one of the **best home visits** my daughter and I have had. Seeing the way my son was around your support facilitator was awesome to see. She explained things so that my daughter could understand what was going on."

"The experience I had with Taikura Trust was really great. We had a good talk about everything and what was important for my son. I felt that **I was included** and it makes me happy that my son is getting the help he needs from Taikura Trust. Thank you very much for your help and support—very much appreciated."

"She was very polite and took her time with me and **explained everything** very well. She was so friendly. I have had some anxiety with this process. I have had a lot of people come into my home. But she made me feel so **comfortable** and I really enjoyed talking to her. It was the most positive conversation I have had so far. She really made me feel like I wasn't alone and that I finally had a lot of support."

"He was awesome and didn't make us feel uncomfortable at all. Usually my son is very shy and doesn't take too well to new people but with your service facilitator he was **playful and cheeky**."

"We can understand why existing processes are in place. Our suggestion is that your starting place should be asking families what it is that they need to best support their child. Services and offerings should then be designed around that."

LOOKING FORWARD INTO 2020

So far, 2020 has not played out as expected. When I first wrote these words, there were a few news stories about a virus, far away from New Zealand. By March, we were in the midst of the most significant health and social event in New Zealand's history. A country in lockdown. Quiet shops and streets. Most of our employees worked from home and our clients adapted to change.

Whilst 2020 will clearly be a different year from what we planned, it will still be a year full of opportunities and new challenges. Covid-19 has certainly forced us to change the way we work. It has meant we have had to support people remotely, to increase our use of technology and do things differently. We have grabbed the opportunity to continue embedding new ways of working and improving how we support our clients to live the lives they want. Looking ahead, we are really excited by the opportunities to work more closely with our Māori and Pacific communities. We want to understand how we can enhance what we do and ultimately better meet their needs and reduce inequalities.

One thing the last few weeks has reinforced is our increasingly connected and integrated world— the importance of strong relationships and the value of working with others. During 2020, we will continue to work with our amazing partners across the sector and also with the individuals and whānau who access our services and support. One of our priorities for 2020 is to continue building strong partnerships and alliances that make us a stronger community together.

The engine room of Taikura is its people. We have a great team, who have risen to the challenge over the last few weeks. It has reinforced the amazing culture we have. It's going to be really important for us to continue investing in our people and making sure they have the support, the tools and the resources they need to do their jobs.

Whilst 2020 might not have started how we hoped, the year is not yet over, so we remain optimistic. We plan to continue providing excellent support and service to our clients and partners. At times like, this communication is so important. So, we would love to hear from you. Drop us a line, send us an email, keep in touch.

Sonia Hawea
CEO



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