

Annual Report to members

It is my pleasure to give Platform Charitable Trust's first annual report and my first as Chair.

I want to take this opportunity to reflect on Platform as an organisation and some of the challenges it faces.

Challenge 1: Expectations on small team

Platform is a tiny organisation with only two staff who are expected to cover off all the usual organisational functions. We expect Marion and Anne to be competent in financial matters, to have excellent networking skills, be sound policy analysts, be technologically proficient and media savvy, be well connected, have good sector intelligence and be good report writers. This is a huge ask and I think Platform is exceedingly well served by Marion and Anne. I thank them for their hard work and for ensuring Platform continues to be a strong sector voice.

Challenge 2: Picking the right work

Because Platform is small we simply do not have the resources to undertake a substantial body of work. This means we have to work smart and do the things that make a difference and are valued by our members. Often this means supporting and facilitating the work you do.

I think Platform has done well this year in "picking the right work". The NGOIT Report on contracting pulled together all the issues that had been dominating our discussions with you for years. It was timely and it is good to see some of the messages echoed in recent government publications. We are encouraged by;

- * the recognition of the need to rationalise audit and reporting processes
- * the emphasis on increasing flexibility in the scope of practice for the workforce
- * the drive to reduce the bureaucracy of the Ministry and DHBs
- * the encouragement of regional planning initiatives

And most importantly the emphasis on developing new models of care that deliver services closer to home and involve stronger community, primary care and secondary care partnerships.

Challenge 3: Providing the solutions

The NGOIT Report provided the spring board to move past the problems and to start articulating the solutions. This is the difficult work and I think where Platform's focus has to be for the next year. We need to be able to clearly describe what works and why, what successful models of collaboration look like, and what do we mean by flexible contracting. There is no doubt that our messages are being heard. We need to participate in the forums where the way forward is being designed.

We have some work underway which is starting to demonstrate the capacity and capability of the sector and tell some stories as to what works well.

Challenge 4: Leaders or followers

It is always a juggling act as to how much an organisation like Platform leads and how much it follows. We understand that it is vitally important to stay connected to our members. One of our strategic priorities is to provide a strong voice on common issues. We know that it is important that we properly represent your concerns and your successes. But there are times when we have to be on the front foot, anticipating emerging trends, spotting opportunities, thinking about different alliances and acting in the moment.

I think one of the strengths of Platform is that it is more than simply the sum of its members. It adds value to their voice and acts with courage and integrity.

Finally I would like to thank the Trustees for guiding Platform in its work and providing the support they do to Marion and Anne. It is a pleasure to work with these inspiring leaders. I would also like to acknowledge the particular contribution of Julie Nelson who stepped down from her role as Chair during the year. Platform owes its success in no small part to the energy and guidance of Julie over the past 10 years. I would also like to welcome Kath Fox CEO of Richmond NZ onto the Board. Kath's skills and considerable experience will be an asset to Platform. I know there are exciting times ahead and Platform looks forward to working with you to realise these opportunities.

Jan Dowland



CEO Report

The first year of operation of Platform Trust has been against a backdrop of a major economic recession, a new government and a major review of Health.

This turbulent environment makes the mission of Platform Trust, to connect, develop and promote a resilient and cohesive community mental health and addictions service sector, right for these times.

Platform Trust represents a new way of organising; where networks, relationships and partnerships are critical. The membership base of the Trust continues to provide the overview of a national network, the mandate from a diverse group of agencies and an independent source of income. Organisations investing in Platform signals support for collaborative sector activity that goes beyond individual interests.

Describing and engaging with the complex issues that impact on the work of NGOs has increasingly become the work of Platform with the findings documented and discussed in the NgOIT reports. This was certainly the case with the NgOIT 2008 NGO- DHB Contracting environment, which put on the record, the impact some poor funding and planning practice was having on NGOs. Our experiences contributed to the recent Ministerial review which echoes the need to streamline contracting, auditing and compliance and to free up NGOs to deliver the innovative flexible services our mental health and addiction system needs. The theme of reducing bureaucracy for NGOs has also been picked up by the Ministry of Social Development as they begin to trial a more elegant contracting process with 'trusted organisations'.

Moving from the incorporated society model to being active within a network of organisations has been exciting new ground. Existing local and regional NGO networks are



Marion Blake

strengthening and new networks and grouping are emerging. This has been welcomed and encouraged as these are the lifeblood of an engaged sector. The set of connections with NGOs groupings in Auckland, Wellington, Taranaki, Nelson, Christchurch and Dunedin, creates a point of focus and a vehicle for collaboration. A relationship to these networks assists Platform to understand local activity, be well informed about emerging local issues and the ability to share national perspectives. This outlook is important as we need to deliver reliable messages to the Government and its various Ministries, District Health Boards, politicians and other community agencies from the NGO mental health and addictions sector.

It is expected that other areas of common interest, potential for sharing good practice, developing learning opportunities and influencing service developments will emerge, as we continue to work in collaboration.

The impact of the current financial environment on community organisations cannot yet be fully understood. Government and other funders are joining the international trend by indicating their interest in seeing consolidation, collaboration and mergers that will result in the reshaping and resizing of the community sector. Where this will take the sector in New Zealand is yet to be seen but it is clear that we still have a huge and important contribution to make to the mental well being of our communities.

Platform depends on the commitment of people and I would like to especially thank Anne Bristol who shares the load, drives the deadlines and every day provides huge support.

After many years of contribution through the evolution from HOMES to Platform Inc and now Platform Trust Julie Nelson has been part of governance, leadership and vision of Platform. I would like to thank Julie as she steps down from the Trust Board for her enduring support to the sector and to me as CEO.

Marion Blake



Audit Report 2008 - 2009

The Platform Charitable Trust audit was completed on 2 October 2009 by Balance Chartered Accountants Ltd Wanganui. This summary of the financial report has been extracted from the full Financial Report which is available on the Charities Commission website www.charities.govt.nz

Statement of financial performance for the year ended 30 June 2009

	2009 \$
Cost of Finance	
Rent & Leases	40,000
	40,000
Total Cash Expenses	314,019
Operating Deficit	(6,496)
Non Cash Transactions	
Depreciation	7,218
	(7,218)
Deficit for the Year	(\$13,714)

Statement of financial position as at 30 June 2009

	2009 \$
EQUITY	
Trust Capital	124,174
	\$124,174
REPRESENTED BY:	
FIXED ASSETS	
Office Equipment	11,574
INVESTMENTS	
BNZ Term Deposit	130,355
CURRENT ASSETS	
BNZ Current Account - 0115594-00	30,715
Accounts Receivable	55,233
Total Current Assets	85,948

LESS	
CURRENT LIABILITIES	
Accounts Payable	12,851
Membership Fees/ Advance	28,544
Holiday Pay Provision	15,926
Income in Advance	13,962
Funds Held in Trust	26,042
Goods & Services Tax	6,378
Total Current Liabilities	103,703
WORKING CAPITAL	(17,755)
NET ASSETS	\$124,174

We acknowledge the financial support and commitment to collaboration of the 2008-2009 Members

Arataki Ministries, Care NZ, Comcare Trust, Connect - Supporting Recovery, Equip, Framework, Odyssey House, Pact, Pathways, Richmond NZ, Te Pou, WALSH Trust, Wellink Trust, Wise Management Services, Gateway Housing Trust, adanz (Alcohol Drug Association NZ), Affinity Services, Fairleigh Lodge, Linkage Trust (Webhealth), Proactive Trust, M.A.S.H Inc, Mental Health Education and Resource Centre, Mental Health Foundation, Porch Ltd, Problem Gambling Foundation, Progress to Health, Psychiatric Consumers Trust, Q-nique Ltd, Rubicon Charitable Trust, Step Ahead Trust, Skylight, Te Runanga o Kirikiriroa Trust, SF Otago, SF Pegasus Bay, Supporting Families Auckland, Stepping Stone Trust, Te Ara Mahi, Take 5 Te Whare Marama, Te Whare Atawhai, Te Whare Mahana, Timaru Mental Health Support Trust/ Victoria House, Wellington After-Care Association, Workwise, Wellington Refugees as Survivors Trust, Valley Transitionz

We acknowledge and thank the New Zealand Lotteries Board and the membership organisations for their financial assistance to Platform Trust.