



Annual Report 2021.

Report Outline.

CHAIR AND CEO REPORT	4
PROGRAMMES AND SERVICES	5
FORWARD TOGETHER	7
SPRINGBOARD	9
OUR TEAM	11
VISION AND MISSION	12
FINANCIAL REPORT.....	13

Chair and CEO Report.



We have led quite the year of growth for Momena, from rebranding to moving into a new office space at The Collective. We've had the privilege of speaking at a number of events and provided training and leadership development in the disability sector. We're leading a community engagement consultation, have been nominated in several award categories as well as continuing to refine and improve the way in which we work alongside our clients.

On the 9th of June 1976, 15 founding members held the Inaugural meeting of Equality Bay of Plenty Incorporated. This was the day our organisation was born, and over the past 45 years we have made many changes, adapted, and grown. We have updated our name several times, from Equality Bay of Plenty to Avalon and finally last year to Momena.

What has remained constant and true throughout this time is the continued commitment we have to our community. Ensuring that our work creates opportunities for people with disabilities and neuro diversity, to achieve their aspirations and live a life they love.

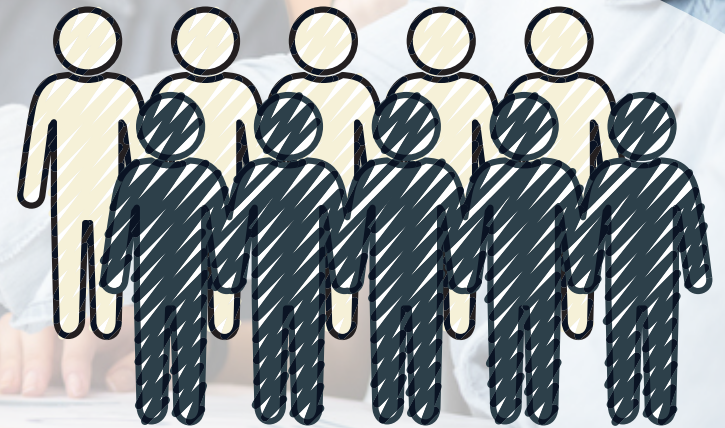
At the same time the ongoing COVID-19 environment has meant that we have all had to adapt and learn to work in new ways; to be responsive and innovative. Throughout this time, we've kept the wellbeing of our clients at the forefront of our service response.

Tania Wilson,
Chief Executive Officer

Vanessa Davey,
Board Chair

Programmes and Services.

50%



Our client demographic has started to broaden and change. Half of all the people we are now working with are under the age of 30.

We recently undertook a client survey to understand the value Momena was bringing to our clients lives and what they would like to see from us moving forward.

Based on this feedback and our own internal review, we are in the process of redesigning how we work with individuals, to ensure we are providing them with the most impactful service. We anticipate implementing this new model of working in Forward Together during the first quarter of 2022.

Our relationships and partnerships with sector providers, community organisations and the local business sector is key in creating opportunities for clients to build their skills, strengths, and capabilities.



We have been privileged to work with a range of organisations including (but not limited to):

- Edvance with Work and Income in the design and delivery of Good to Great, a pre-employment programme
- Good Neighbour with volunteering opportunities and life skills development
- Budget Advisory and Literacy Bay of Plenty for literacy and financial education
- Pacific Coast Institute in the Feuerstein method of teaching the important skills of 'how to learn'.



Forward Together.

125

Number of clients we have worked with in
our Forward Together service this year.



Our focus has continued in the domain areas of Meaningful work, Health and Wellbeing, and Growth and Learning.

- 50% of Momena clients are working in the domain of Meaningful Work. Becoming an employee is the most valued role that our clients are seeking.
- 28% of Momena clients have been focussing on the domain area of Growth and Learning which features education and training, practical skills and creativity.
- Having good, strong physical, mental, emotional and spiritual health is essential for all of us in order to live good lives. 22% of Momena clients have been focussing on this holistic area of Health and Wellbeing.



50%
**MEANINGFUL
WORK**



28%
**GROWTH &
LEARNING**



22%
**HEALTH &
WELLBEING**

Springboard.

12

Number of students who completed our
Springboard - Transition from School
programme this year



Momenta completed our first full year of working in Springboard – Transition from School with students from across Tauranga High Schools, in their last year of school. Leaving school is an exciting but also challenging time for both young people and their whanau and our work is to support this transition to be as successful as possible.

We have come to learn that it is a big ask for readiness for life afterschool to take place all in the final year of school and see an enormous value in beginning earlier in the student's secondary school years.

The Ministry of Social Development is currently in the process of reviewing Transition. Momenta is contributing our thinking and experience into this process, and the review is a valuable opportunity to explore new ways of working with students before their last year of school.



Our Team.

New Staff Members



Kim Kirkcaldie



Campbell Higgins



Erinna Rowlands

Momenta is fortunate to have the most amazing team of people; our staff, board and volunteers all committing their time, talents, skills and hearts to making a difference in the lives of the people we are here to serve. We are thrilled to have welcomed new team members to the Momenta family.

New Board Members



Keri Welham



Paora Howe



Vanessa Davey



Scott Wikohika

We are very excited to have Vanessa Davey appointed as Board Chair, our first woman Board Chair! The strengths and diversity of the entire Momenta team creates a solid platform on which we stand to create, share and deliver on ideas and opportunities for people with disabilities to live great lives.

Our Vision.

A community where all people have the opportunity to choose and **go after a life they love.**

Our Mission.

To develop, share and drive innovations that **challenge barriers to inclusion.**

It is of great importance to our governance and leadership team that Momena continue to provide exceptional service, innovate, hold true to our values, and ensure that we are sustainable into the future. This has seen us working hard on refreshing our strategic direction and also examining the words we are using to describe our work – namely, our Vision and Mission.

We are exceptionally proud to share our new Vision and Mission, which represents what we want our community to look like and how we will contribute to making that happen.

Financial Report.

Momenta Charitable Trust has finished the year with a net surplus of \$375,779. The net surplus from direct service was \$91,080. The trust is trading solvently, with costs contained, and has the opportunity to ensure a sustainable strategy is formulated for the future.

The MSD Participation and Inclusion contract has been fixed until June 2024, which is allowing the trust to have some stability and to ensure service is provided at a high quality.

Revenue	2021	2020
Donations, fundraising and other similar revenue	-	3,591
Revenue from providing goods or services	845,803	858,121
Interest, dividends and other investment revenue	408,274	161,824
Distribution from Equality Property Trust	4,191	3,639
Total Revenue	1,258,268	1,027,175

Expenses

Volunteer and employee related costs	632,944	610,574
Expenses related to providing goods or services	166,968	242,257
Other expenses	82,577	58,701
Total Expenses	882,489	911,532

(Deficit)/Surplus for the Year	375,779	115,643
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Assets	2021	2020
Current Assets		
Bank accounts and cash	146,774	147,242
Debtors and prepayments	53,130	32,595
Total Current Assets	199,904	179,837
Non-Current Assets		
Property, Plant and Equipment	88,441	109,053
Investments	5,096,134	4,736,887
Total Non-Current Assets	5,184,575	4,845,940
Total Assets	5,384,479	5,025,777

Liabilities	2021	2020
Current Liabilities		
Creditors and accrued expenses	29,788	54,567
Employee costs payable	46,970	38,883
Other current liabilities	1,196	1,668
Total Current Liabilities	77,954	95,118
Non-Current Liabilities		
Loan	583	496
Total Non-Current Liabilities	78,537	95,614
Total Assets less Total Liabilities (Net Assets)	5,305,942	4,930,163

Accumulated Funds

Opening balance	4,930,163	4,814,520
Current year surplus	375,779	115,643
Total Accumulated Funds	5,305,942	4,930,163



Annual Report

2020 - 2021

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