

# Annual Report 2022.





# Report Outline.

<b>CHAIR AND CEO REPORT .....</b>	<b>4</b>
<b>OUR VALUES .....</b>	<b>5</b>
<b>PROGRAMMES AND SERVICES .....</b>	<b>6</b>
<b>DISCOVERY .....</b>	<b>7</b>
<b>SPRINGBOARD .....</b>	<b>8</b>
<b>OUR CLIENTS .....</b>	<b>9</b>
<b>OUR LOCATION .....</b>	<b>11</b>
<b>IMPACT &amp; LEADERSHIP .....</b>	<b>12</b>
<b>OUR TEAM .....</b>	<b>15</b>
<b>FINANCIAL REPORT .....</b>	<b>17</b>

# Chair and CEO Report.



Mā te kimi ka kite. Mā te kite ka mōhio. Mā te mōhio ka mārāma.  
Seek and discover. Discover and know. Know and become enlightened.

Over this past year, the board and staff of Momenta have strengthened our commitment to remain curious and seek knowledge and understanding of our clients' needs and aspirations. This has allowed us to respond by evolving the way in which we work. Ensuring we continue to provide a meaningful and impactful service that is connecting people with opportunities to grow, develop, and live their best lives.

We have had quite the year of growth and change in Momenta. An evolution in service model has been supported by a change in board and team members as well as relocation to a new office.

Organisation and team development has been a key focus over the past year, deepening our strengths-based culture, building our cultural awareness, and ensuring our systems and processes support all our work in a valuing way.

Momenta continues to focus on connection to our community, building networks and relationships, driving awareness, and advocacy so that the people we are here to serve have optimal opportunities to go after a life they love.

Tania Wilson,  
Chief Executive Officer

Vanessa Davey,  
Board Chair



# Our Values.



Following the review of our **vision** and **mission**, the staff and board worked collectively to refine our organisational values. This work has been hugely valuable as our core values help shape our culture, our purpose, and the way in which we go about our work in the world.

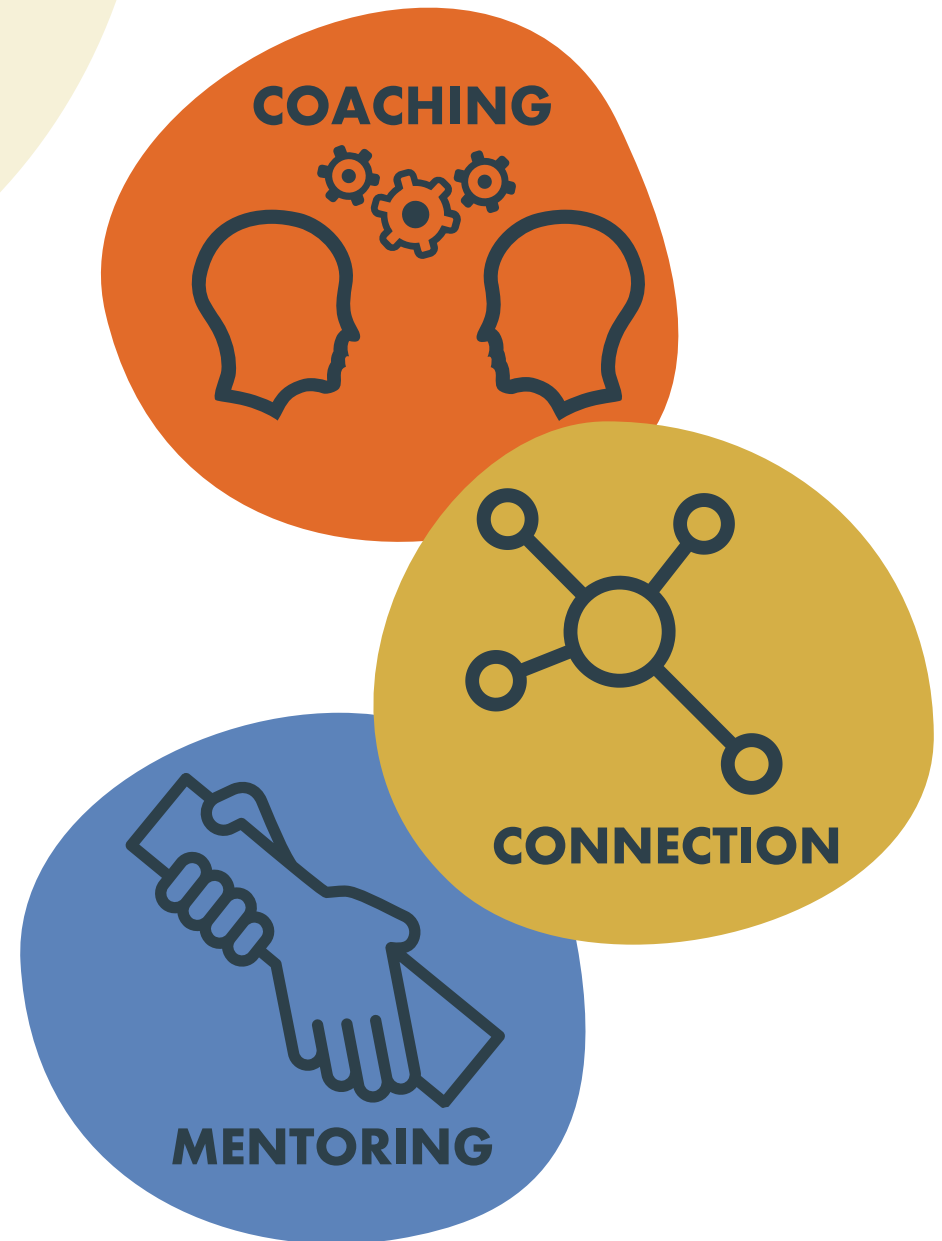


# Programmes and Services.

Following a client engagement survey and internal review of service during 2021, we undertook a service redesign which was signed off by the board in December 2021. The new model is an approach which is focused on building a person's self-awareness, confidence, and capability so that they may have a greater opportunity to access and retain valued roles that align with their individual aspirations.

The model provides service in three ways:

- Life skills coaching. Three professionally designed coaching programmes - **Discovery**, **Self Mastery**, and **Social Mastery**.
- Connection (Forward Together). Working with the person and their whānau, identifying key role aspirations, then utilising our community networks to facilitate those connecting role opportunities.
- Mentoring. Continuing to provide mentoring support and advice following connection, until the person feels confident in living the life they love.



# Discovery.



In 2022, we launched the first of the three coaching programmes: **Discovery**. Through a series of intentional conversations as well as experiential practice, the **Discovery** programme explores the person's inner self to discover who they are, the roles they hold or aspire to, their purpose, what makes them unique, as well as their goals for the future.

To date, **63** clients have undertaken the **Discovery** programme and we are capturing various forms of data, including our clients' voice, which allows us to refine and understand the impact for each person.

- "I think Discovery is really good because it is helping me to see the things that I can do and the things that I want to try."
- "I used the learning style info to help me with training someone new again at work. It has really helped with understanding how different people learn and process information."
- "I have learnt that I can do things I thought I couldn't - that my mum wouldn't expect me to do."
- "My confidence has been improving, I have been talking to more people, spending more time with girlfriends and - amazingly - I stood up to one of my friends who is always asking for money!"

---

Our two new programmes, **Self Mastery** and **Social Mastery**, will be launched in early 2023.



# Springboard.



9

**Number of students we continued to support in our Springboard programme.**

**Of these students, 6 who finished school have gone on to participate in Momenta's Discovery programme.**



# Our Clients.



We have also observed over the past several years a change in our client demographics, particularly in the age of people we are providing service to.

**68%**

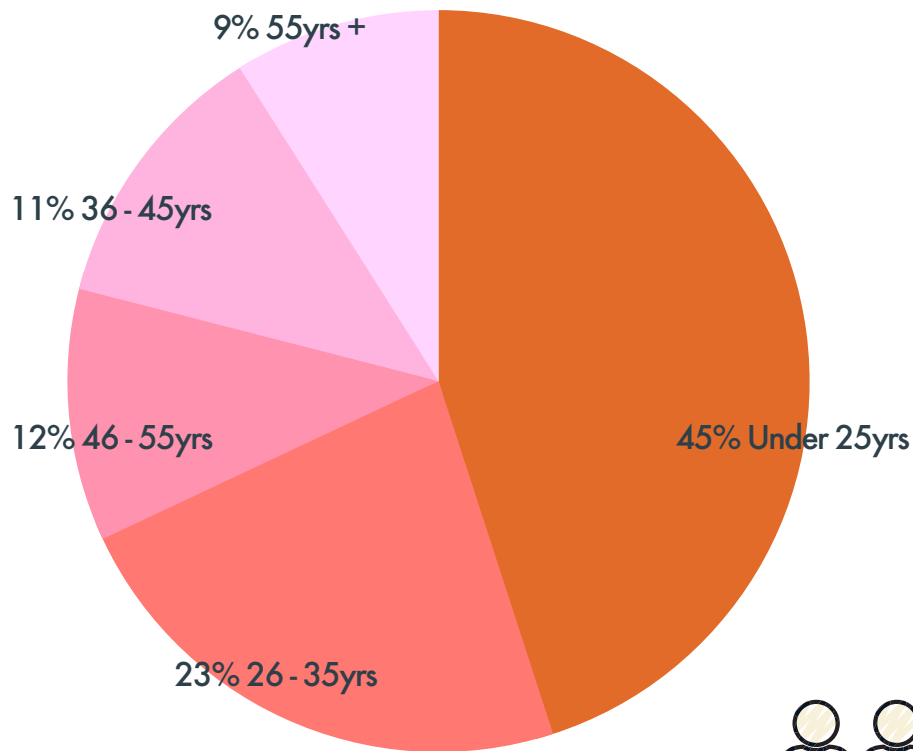
of our client base are now under the age of 35.



Before the change in service model in 2014, we were failing to attract many young people to service. This uptake in a younger demographic is in alignment with younger disabled and neurodivergent people, who are seeking a more person- and community-oriented service.

Momenta has historically provided services to people with intellectual disabilities. This, too, has changed over the past few years, with an uptake in service from people who identify as neurodiverse. As a service, this means we have to keep challenging ourselves to ensure our service is meeting the needs of our diverse client group.

## Age of client



**47%**

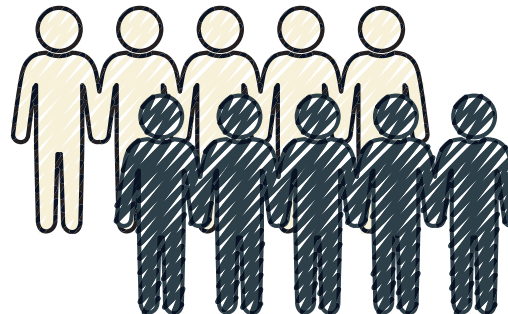
**Identify as neurodiverse**

**51%**

**Identify as having an intellectual disability**

**27%**

**Identify as having a known health condition**





# Our Location.



To support our newly developed service model, we required an office space which would provide professional and private coaching spaces. Unfortunately, this was not an option at The Collective so in January 2022 we moved to a new premise at **144 Fraser Street** which better suits our service requirements.



# Impact & Leadership.

Momenta is committed to growing and developing the governance capability of disabled and neurodivergent people, to influence and transform strategy and leadership in businesses, organisations, and communities.

This year we launched our inaugural Aspiring Director Programme. The programme provides people with disability, who demonstrate governance potential and ambition, the opportunity to participate on the Momenta board for one year, undertake mentorship from Momenta board members, and receive training from the Institute of Directors.

We were very pleased to welcome

**Michael Lloyd**

as Momenta's first

**Aspiring Director.**





Momenta was engaged by the Lakes and Bay of Plenty District Health Boards, in partnership with Zest Consulting, to lead the community engagement and development of the Waiariki Disability Action Plan.

The action plan was written as a direct result of feedback from people in the local disability community, including service users, whānau, and providers. The plan has been designed to ensure the Waiariki district is a place where disabled people have an equal opportunity to achieve their goals and aspirations.

The Waiariki Disability Action Plan project was completed in May 2022 and signed off by both DHB boards. The Waiariki Disability Action Plan is a living document which will continue to be adapted to meet the needs of disabled people and the changes occurring in the health system.



**MAKE REAL CHANGE IN THE LIVES OF  
PEOPLE LIVING WITH DISABILITIES IN THE  
WAIARIKI REGION.**



**Mā te huruhuru ka rere te manu**





# Building a **Strengths-Based Culture.**

Momenta is committed to being a strengths-based organisation. Simply put, strengths-based development is the practice of identifying each team member's key strengths, developing those strengths, and putting the team in positions where they can best utilise their strengths.

Our strengths are becoming a key part of our team culture and informing our people, policies, processes, and plans. The CliftonStrengths assessment is now a vital component of our recruitment process, ensuring a good talent-to-role fit. We're also using it as the foundation for our individual development plans, supporting our staff to grow and develop by building on their unique strengths and talents.

Internal team strengths training and the introduction of strengths focussed peer coaching was also undertaken this past year, creating a team that is emotionally engaged with its work.



# Our Team.

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

This past year has been a big year of change within both our operations and governance teams. It has created the opportunity to welcome amazing new people to Momenta. Each new team member has brought a different perspective, a diversity of skills and talents, and a passion to serve our clients.

New **Life Skills Coaches**: Sabrina McQueen, Tyler Goodall, Beena Rugnathji, Shay McNeilly.

New **Community Connector**: Sam Kemp.

New **Board Members**: John Grant, Dr Robbie Frances Watene.

---

We sadly farewelled several staff and board members. We are thankful for the contribution and value each person has added to Momenta as an organisation and to our clients, over many years. We thank you all and wish you much success and happiness on the next stage of your life's journey.

## New Board Members



John Grant



Dr Robbie Frances Watene

## New Staff Members



Sabrina McQueen



Tyler Goodall



Beena Rugnathji



Shay McNeilly



Sam Kemp



# The Year Ahead.

This year has seen significant change in the disability sector, culminating in the creation and launch of Whaikaha, Ministry of Disabled People. In the year ahead we look forward to working alongside the new ministry and will continue to focus on delivering an optimal service to our clients, which is aligned to and informed by the principles of Enabling Good Lives.

# Financial Report.

Momenta Charitable Trust has finished the year with a net surplus of \$64,452. The organisation has remained in surplus despite impactful movements in staff and additional training. Other revenue stream enquiry and a growth strategy plan are in development to mitigate the budgeted deficit for 2023.

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	2022	2021
Donations, fundraising and other similar revenue	278,074	-
Revenue from providing goods or services	1,084,023	845,803
Interest, dividends and other investment revenue	125,724	408,274
Other revenue	342	4,191
<b>Total Revenue</b>	<b>1,488,163</b>	<b>1,258,268</b>

## Expenses

Volunteer and employee related costs	820,418	632,944
Expenses related to providing goods or services	212,242	166,968
Other expenses	391,051	82,577
<b>Total Expenses</b>	<b>1,423,711</b>	<b>882,489</b>

<b>(Deficit)/Surplus for the Year</b>	<b>64,452</b>	<b>375,779</b>
---------------------------------------	---------------	----------------

Assets	2022	2021
<b>Current Assets</b>		
Bank accounts and cash	331,254	146,774
Debtors and prepayments	74,759	53,130
<b>Total Current Assets</b>	<b>406,013</b>	<b>199,904</b>
<b>Non-Current Assets</b>		
Property, Plant and Equipment	89,680	88,441
Investments	4,971,014	5,096,134
<b>Total Non-Current Assets</b>	<b>5,060,694</b>	<b>5,184,575</b>
<b>Total Assets</b>	<b>5,466,707</b>	<b>5,384,479</b>

Liabilities	2021	2020
<b>Current Liabilities</b>		
Creditors and accrued expenses	35,241	29,788
Employee costs payable	54,242	46,970
Other current liabilities	4,893	1,196
<b>Total Current Liabilities</b>	<b>94,376</b>	<b>77,954</b>
<b>Non-Current Liabilities</b>		
Loan	1,937	583
<b>Total Non-Current Liabilities</b>	<b>1,937</b>	<b>583</b>
<b>Total Assets less Total Liabilities (Net Assets)</b>	<b>5,370,394</b>	<b>5,305,942</b>

## Accumulated Funds

Opening balance	5,305,942	4,930,163
Current year surplus	64,452	375,779
<b>Total Accumulated Funds</b>	<b>5,370,394</b>	<b>5,305,942</b>





# Annual Report

2021 - 2022

---

**CONTACT@MOMENTA.ORG.NZ • 07 579 0585**

**144 FRASER STREET, TAURANGA**

**WWW.MOMENTA.ORG.NZ**







