



Hōhepa

every life fully lived

Hōhepa Homes Trust Board

2023 / 24 Annual Review

OUR VISION

Every life fully lived

Our Mission

Supportive communities inspired by anthroposophy, which celebrate the diverse ways of being human.

Our Values

Whakamana and Sustainability.



Regional Map



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2023 / 2024 Chairperson's Report



Kia ora,

I am pleased to report a solid year of performance, continued progress and positive outcomes.

Our group operating revenue increased by \$13.4m to \$82.9m. Our net surplus of \$7.2m includes donations and grants of \$5.2m. These donations enable us to continue with building and infrastructure development. Total assets increased by \$10.6m to \$71.2m with total equity of \$55m.

Strategic initiatives across the regions are aligned to our Vision of 'every life fully lived', our Mission of 'supportive communities inspired by anthroposophy which celebrate the diverse ways of being human' and our Values of 'whakamana' and 'sustainability'.

As always, we have a high degree of focus on the people we support, ensuring healthy and safe homes and workplaces. Choice, the opportunity for community participation, work opportunities and recreational pursuits bring satisfaction and meaningful lives. Those that we support across NZ are aged from 8 to 78. Our school and children's community in Hawkes Bay continues to flourish as do all of the Rangitahi and Adult communities in all of our regions. Celebration of festivals and events have again highlighted our strong culture and community engagement.

We are committed to the continuity of our anthroposophical impulse.

Our General Managers ensure high levels of communication with families, staff and key stakeholders.

The Trust Board has committed to the development of our risk management framework and content, ensuring we are safe, compliant and fit for purpose.

Regional highlights and strategic initiatives are many.

In Auckland, significant work was undertaken to strengthen our management and service delivery. We also finalised Stage 1 of our 10 year vision committing to the construction of two new five bedroom homes to commence in 2025.

In Canterbury, we have developed a Digital Citizenship Framework to enable those we support to occupy online spaces in a safe manner. Volunteers made a significant contribution with diversity of experience and views they brought. Planning for infrastructure improvements and new housing was also completed and will roll out in the foreseeable future.

Wellington completed its first year as a standalone region. Our new Board and General Manager have delivered excellent services, developed high levels of communication with stakeholders and focused on continuity of our growth initiatives. We are grateful for the continuing support of the Dorothy Spotswood Foundation who funded the construction of four new Lockwood Homes over the last year.

In Hawkes Bay, our community continues to flourish. Our school and various social enterprises are strong and future focused. The exit of residential services from Clive has continued with ongoing building of new homes at Poraiti. The new Harris House, a purpose built Elder facility is now fully operational with eight residents. The new Cunningham House has been completed with four residents moving into their new home in October. Both houses are outstanding. Fit for purpose design and quality construction has resulted in two world class homes.

A century of the international biodynamic movement was celebrated in May with a centenary conference, international Speakers and attendance from practitioners from all over NZ. Our farm in Clive (founded in 1956) is the longest-certified biodynamic farm in operation in Aotearoa, New Zealand. Our retail outlets in Clive, Taradale and Napier City continue to prosper and serve as an excellent way to engage with the broader community.

We are grateful for the dedication of all of our management and staff. You can be proud of your achievements.

I would like to thank our trustees and regional board members for your service.

To the families, friends and funders of Hōhepa we thank you for your support and encouragement.

Finally, to those that we support, you are our reason for being. Helping you lead a life fully lived is a privilege.

Mark Boyle

HŌHEPA HOMES Trust Board



Mark Boyle (Chairperson)



Sean Maguire



Glenn Livingstone



Neill Culley



Stuart Campbell



Sandra Budd



Tracey Lanigan



Melanie Kenrick



Andrew Brown

Audit Committee Members:

- Stuart Campbell (Chairperson)
- Ed Eadie
- Josie Willis
- Paul Rickerby
- Souella Cumming
- Mark Boyle

Risk Committee Members:

- Sandra Budd (Chairperson)
- Nikki Fisher
- Kyle McWilliams
- Anne Read
- Sandra Arathimos
- Melanie Kenrick
- Tracey Lanigan
- Mark Boyle

In the past year Waylyn Tahuri-Whaipakanga and Ewan Chapman resigned as Directors from the Hōhepa Homes Trust Board. We would like to thank Waylyn and Ewan for their time contributions to Hōhepa and wish them well for their future endeavors.

This financial year the Hōhepa Homes Trust Board welcomed two new Directors: Glenn Livingstone as Chair of the Canterbury Regional Board and Neill Culley as Chair of the Hawkes Bay Regional Board.



NEW HOME Hawkes Bay



The focus over the past few years has been to relocate from Clive to Poraiti with new bespoke houses built as part of this goal. We recently opened Cunningham House, a four bedroom home, and Harris house, an eight bedroom elder house, allowing us to bring people back to the place many of them began their life at the Hohepa school.



NEW HOME Wellington



Over the past year work has been underway to build four new Lockwood homes on the Otaihanga site, increasing the number of beds on site by 11. These homes are purpose built, fully accessible and to a high specification so people can fully live their lives. Thanks to Dorothy Spotswood and Mark Dunajtschik for their support of this project.



HŌHEPA Auckland

2024 has been a year of change at Hōhepa Auckland. We have seen a change in the management team, with new General Manager Emma Ratcliff starting in October 2023. There has been appointment of a new role, Training, Culture and Hauora Manager, to ensure we have clinical experience in the team for responsiveness to the changing needs of the people at Hōhepa Auckland. We also have a new Service Manager. With new faces in the executive team, change management has been a key focus. Development of relationships with all stakeholders has been central to the year and we are enjoying the collaboration across various areas of our work.

New House Leaders have been appointed for six of our seven houses, and this has brought a depth of skill and leadership that is having a positive impact for both people we support and staff.

The support worker staff, who have the key relationships with the people we support, continue to bring a commitment and aroha to their role that is commendable. The people we support at Hōhepa Auckland, both in residential and community participation services, are enjoying new faces and the culture, food and connections that come with this.

The people we support are engaging in a new range of activities, while keeping those they truly enjoy. We had our inaugural Hōhepa Auckland Olympics day. This was a day of teamwork, celebration, and most of all, laughs.

We have reviewed our operational platforms and are developing our use of online platforms for efficiency, quality assurance and reporting.

In June we underwent our DAA Audit. This was an opportunity for the new team to reflect on current practices and plan for future growth within the workplace. This process brought a clear focus and workplan for future development.

The Community Participation programme is under review to ensure we are responsive to the needs of the people we support. An activities and engagement coordinator has been appointed, and we are seeing more connections outward to the community and new activities and programs underway.

Changes in Disability Services and funding, changes in social and political contexts has been part of the year. We are looking at challenges as a means of growth and opportunity for the future. Building



community through looking forward and reflecting on who we are, why we are here, and the changing context we live in.

After several years in the development phase, we are about to get bricks and mortar with our building project. In November the build of two five-bedroom homes will start. These will be fit-for-purpose homes and will provide a Home for life for the people living at Hōhepa Auckland. The development of the home and design features has been a collaborative project with input from regional Board, House Leaders, people we support and health professionals to ensure we are meeting a high spec level for the home. The building project will bring significant change to Hōhepa Auckland, the first being the demolition of 'Lavendar Cottage'. This was the first home to be purchased in 1987, and the start of Hōhepa Auckland as a home for the people we support. Lavendar Cottage holds a significant place in the history and biography of Hōhepa Auckland. We will have a blessing for the removal of Lavendar Cottage, and a second blessing for the building of the new home.

We are looking forward to 2025 as a year of further growth, strengthening our practices, and ensuring we are always striving for every life fully lived.

Did you know?

Community participation has provided
44,754
hours of activity and engagement



A favourite home cooked meal in the houses is Indian curry



We had our inaugural Hohepa Auckland Olympics Day



We have an onsite Drama group that creates their own plays

Circability is a favourite CP activity



The oldest house has the oldest and youngest person we support living there



Most of the management team have their birthdays in SEPTEMBER



We love fresh fruit ice cream from Kumeu

The new Hohepa Welcome sign is made from crockery broken in the Christchurch earthquakes

The breadmaking group provided all the bread for Matariki Festival - over 25 loaves of sourdough.



HŌHEPA Canterbury

Good lives are real lives. Real lives are of course messy, challenging and rewarding. In this year we have worked with individuals and at a sector level to ensure that disabled people are well supported to live the real life they choose.

Like many of us disabled people are increasingly living their lives in on-line spaces, connect with others in this way and use social media for fun. It has been challenging to develop a Digital Citizenship Framework to enable disabled people to be supported to do this in a safe and informed way. It has been rewarding to observe the tangible benefits for the disabled people who have used it. It has been exciting to have our peers in the disability sector adopt the framework and for it to be promoted by leaders like Netsafe.

We have continued to develop our risk and health & safety frameworks. We are re-framing these aspects of our role in people's lives as enabling. Ensuring continuously improved systems for both of these important tasks enables this thinking to become in-built into how we support people and for us to recognise and respond to risks and hazards so they



are managed and people can pursue their view of a good life.

As always the best stories are about each of the awesome people we support – too many to share here. Those stories are enabled by the behind the scenes work I have described and of course, by the many people that make Hōhepa the community that it is.

Our board members give generously of their time and expertise to map the strategic future for the

organisation, something that has been re-visited this year with a 2030 horizon. This is a team of people who care deeply about the future of Hōhepa and provide a valuable sounding board for members of the leadership team. A real highlight this year has been to deepening connection to the Advisory Group who prepare diligently for their time with the board.

Hōhepa team members, both paid and voluntary, continue to be highly engaged, 90% of staff report they are proud to work for Hōhepa Canterbury. Volunteers contributed 8693 hours across the year,



more importantly is the diversity of experience and views they brought. Our team members engage in meaningful mahi and it makes a real difference to people's lives. I especially want to thank those team members who remain committed to Hōhepa over the years.



Whānau continue to contribute to the fabric of the community, most importantly holding us accountable for quality support and ensuring people are living their choice of a good life. Involvement of whānau is an important aspect that makes us unique. I am looking forward to working more closely with enthusiastic whānau who share a strong vision for Hōhepa.

All of these people are living their life, Hōhepa is a part of that and they are a part of life of Hōhepa. We remain committed to every life, fully lived.

Did you know?

432 interviews completed

73 compliments from stakeholders



22 events hosted by Hōhepa

8693 volunteer hours



78% of the team hold Health and Wellbeing qualifications

1 home renovated to be accessible

80 menus reviewed by a dietitian

HŌHEPA Hawkes Bay



A Year of Resilience, Growth, and Recognition.

As our world navigates increasing complexities, Hōhepa Hawke's Bay remains steadfast in our commitment to building a brighter future for members in our communities.

The past year has been one of significant challenges, yet also remarkable achievements and unwavering community spirit.

We faced the ongoing impact of COVID and the devastating effects of Cyclone Gabrielle, which brought significant hardship to the wider Hawke's Bay region. Despite these unprecedented difficulties, our community has demonstrated remarkable resilience, remaining strong, prosperous, and deeply connected.

Our success is rooted in our unwavering commitment to the people we support and our dedication to our values of whakamana, community, subsidiarity and sustainability. These underpin our culture of inclusivity, connection, and resilience.

Key Accomplishments:

- **Service Growth and Community Engagement:** We have significantly expanded our service delivery, successfully transitioning residential services from our Clive to Poraiti. In partnership with Kāinga Ora, we opened two new homes in the Wellington region, with plans for four more in the coming year. These initiatives demonstrate our commitment to providing accessible and high-quality housing options for individuals with disabilities. We continue to engage deeply with our community through farmers' markets, retail spaces, and various social enterprises. Our annual festivals and events remain vital celebrations of our unique culture, grounded in anthroposophy and Te Ao Māori.
- **Sustainable Practices:** Our farm improvement program continues to thrive, delivering sustainable quadruple bottom line performance. We are proud of our award-winning cheese, our well-regarded woodwork, stone carving, native tree nurseries, beautiful candles, and a wide range of woven wool garments—all crafted with care and dedication.
- **Quality Programs and Staff Development:** We are committed to providing high-quality school, home support, and community participation programs.



Our commitment to ongoing staff training and development ensures we maintain service excellence and adapt to the evolving landscape of disability services. Our rigorous Individual Development Plans (IDPs) guarantee the individuals we support receive the care and support they need.



- **Financial Stability:** Our robust financial performance enables us to invest in the maintenance of our buildings, properties, and systems, ensuring the ongoing quality of our facilities and services.
- **Looking Ahead:** The coming year will see continued dedication to our mission of creating a supportive community inspired by anthroposophy. We remain committed to fostering the resilience of our Hōhepa Hawkes Bay identity and upholding our core principles of inclusivity and connection. We are confident in our ability to navigate future challenges and continue providing exceptional care and support to all within our community.
- **Gratitude:** Finally, we extend our heartfelt gratitude to our dedicated staff, families, community partners, and all those who have supported our efforts over the past year. Together, we will continue building a brighter future for everyone we serve.

Thank you for your ongoing support and for being a vital part of the Hōhepa Hawkes Bay community

Did you know?

Founded in
1957



High levels of
satisfactions with
all stakeholders

Strong
Community
Focus

Diverse
Services



Sustainable
Practices

Beautiful



Locations

Empowering
Individuals



Cultural
Enrichment



Art and
Creativity

Strong
Volunteer
Network

Award
Winning



HŌHEPA Wellington

This year has been one of significant growth and development for Hōhepa Wellington. We are proud to announce the completion of the first stage of our Otaihanga site development, marked by the construction of four Lockwood homes which were completed in August.

We have successfully transitioned to operate independently from Hōhepa Hawkes Bay. Establishing a standalone Wellington Regional Board and managing all support services locally were significant goals for year one. This year-long project

To this end, most of our support staff have completed Active Support training, followed by job coaching and mentoring. The values of the Active Support Programme align perfectly with our national and regional values, working in partnership with people, nurturing individual strengths and building capabilities. The programme has led to increased participation and learning in both the home environment and in community activities, encouraging exploration of new opportunities and emerging interests.



This year, we welcomed two new individuals into our service. Although plans to accommodate more people in the new homes have been temporarily halted due to recent government decisions, we remain committed to our expansion goals in the foreseeable future.

has culminated in a strong sense of pride as we now function as our own business entity.

In creating our unique identity, we have developed a set of service values that reflect our way forward and complement the Hōhepa national values. Connection, Responsiveness, Tika and Pono, will be integrated into our daily practices, and we are excited to work alongside our workforce to embed these values.

To support future growth, we have expanded our management team with two new part-time roles:

A Capability and Relationship Manager, whose focus is on developing career pathways, enhancing stakeholder engagement, and raising our profile through social media.

A Project Development Lead who holds the responsibility for managing the phases of our five-year development plan, whilst administrating the maintenance and upkeep of our existing properties.

Our primary focus has been on improving the quality of engagement with the people we support.

From a systems perspective we have recently completed the implementation of iPlanit, the information system for the people we support. All documentation related to support is noted in the system and can be easily updated as needed. This means information is always current, is easily accessible and there is only ever one version of the truth.

As a continuation of our 10-year vision, we spent an exciting few days working alongside Studiopacific Design to create an inspiring concept plan for our future. The plan includes interactive spaces, quiet spaces, sensory spaces, gardens, tunnel houses, and drying rooms to enhance our self-sustainability efforts and support our future micro-enterprises in fresh and dried herbs, microgreens, and flowers. These spaces will also provide opportunities for the wider community to engage and benefit from the land. The piece de resistance of the plan being the look-out, that looks back at the entire site and in pivoting, to the iconic and much coveted Kāpiti Island.

We look forward to exciting times ahead.

Did you know?

4
new homes
completed

14,418 eggs sold
in the first 10
months of a delivery
business enterprise



4 people
we support
displayed
their art at
Parliament

120 years
of disability
experience
in the senior
management and
executive teams

2 new
people in
service

74% of people
we support
workers have
completed
Active
Support
Training



77.5% of our support
staff believe the
values related to
anthroposophy are
visible in practice

SIX
working bees
with friends
and family

2 grants for
sustainable
energy
underway



HŌHEPA Financial Statements

OPERATIONS	Year ending 30 June 2024 \$000		Year ending 30 June 2023 \$000	
INCOME				
GOVERNMENT SUBSIDIES	70,239	85%	60,317	87%
INVALID BENEFITS	4,257	5%	3,861	6%
FARM & WORKSHOPS	1,145	1%	1,055	2%
OTHER INCOME	1,757	2%	1,922	3%
INTEREST	281	0%	178	0%
TOTAL OPERATING INCOME	77,679		67,399	
EXPENDITURE				
COST OF GOODS SOLD	754	1%	499	1%
EMPLOYEE BENEFITS EXPENSE	60,145	79%	53,862	81%
DEPRECIATION & AMORTISATION EXPENSE	2,426	3%	2,248	3%
OTHER EXPENSES	11,620	15%	9,984	15%
FINANCE COSTS	389	1%	196	0%
OTHER LOSSES / (GAINS)	363	0%	19	0%
TOTAL OPERATING EXPENDITURE	75,697		66,808	
OPERATING SURPLUS / (DEFICIT) BEFORE FUNDRAISING	1,982		591	
FUNDRAISING INCOME				
OPERATIONAL DONATIONS	466		234	
CAPITAL DONATIONS	4,783		1,874	
TOTAL FUNDRAISING INCOME	5,249	6%	2,108	3%
NET SURPLUS FOR THE YEAR	7,231		2,699	
TOTAL ASSETS	71,241		60,684	
TOTAL LIABILITIES	16,209		12,883	
TOTAL EQUITY	55,032		47,801	

THANKS TO OUR Funders

Special thanks to all those who generously gave to the Hōhepa Hawkes Bay Give a Little page after Cyclone Gabrielle, helping to raise over \$25,000 towards recovery efforts.

Thank you to all these individuals, trusts and organisations who have so generously supported our work this year with gifts of \$1,000 or more:



Canterbury

AM Nichol	Hazlett Limited	Masonic Lodge
Anne O'Connell	Hohepa South Parents Association	Maurice Cater Foundation
Aotearoa Gaming Trust	J & M Wells	Peter Davies
Liz Rutherford	Jill Dampier-Crossley	Rob & Sue Allison
Clearwater Golf Club	Sheelagh Thompson	Roslyn Marshall Family
Garland Family	Linzi Bull	Rosma Trust
Hattrick Services	Lions Club of Christchurch	Sir John Hall Trust

Hawkes Bay

Cleghorn	Marian Stronach	Napier City Council
Sutherland Self-Help Trust Board	Judy & Gary Stichbury	Bannister family
SG Brown Properties Limited	Ian & Alison Barron	Nancy Woodhouse
The Leader family	Hohepa Families & Caregivers Association	Josie Willis
Frimley Foundation	Hohepa Foundation	NOW
New Zealand Red Cross Foundation	Shelley Witchalls	Weleda
Carol Carr	Still family	Tech Group
Lion Foundation Limited	New Zealand Community Trust	Department of Conservation
Wood family	David Giblin	Lottery Hawke's Bay
Eastern & Central Community Trust	Stronach family	Mitre10 MEGA
	Willis Legal	Pak N Save Tamatea

Wellington

Mark Dunajtschik and Dorothy Spotswood

Auckland

Peter and David Picot Charitable Trust



Hōhepa

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www.hohepa.com