



**Presbyterian
Support**
Otago

PRESBYTERIAN SUPPORT OTAGO

Annual Report 2025



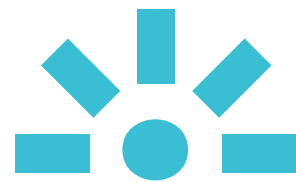
Enliven


**Family
works**

You might notice something different...

Presbyterian Support Otago is adopting a refreshed brand identity, generously gifted by Presbyterian Support Northern and approved by Presbyterian Support New Zealand for use across all regions—without obligation.

The PSO Board has endorsed this change as it offers a more modern, unified look and supports our community focus.



Still us, just refreshed...

We have already begun the process to update our digital platforms and will gradually replace printed materials as needed over the coming years.

This phased approach ensures this update is implemented with minimal financial impact. During the transition, it's expected that both old and new branding will coexist for a period of time.



Our Vision

Tō Mātou Matawhānui

Every person is valued and grows in a safe and strong community.

Our Mission

Tō Mātou Whakatakanga

We walk with people across the generations to create together places to live, learn and thrive. We call out injustice and advocate for positive social change.

Our Values

Ō Mātou Uara

Founded in our Christian faith we act with the values of integrity, respect, courage, manaaki and aroha.



PSO Board members (from left): Mark Shirley, Kerry Enright (*Deputy Chair & Acting Chair of Finance, Risk & Audit Committee*), Kurt Thomas, Stephanie Pettigrew (*Board Chair*), Mani Malloy-Sharplin, Julie Loan, Vicki Botting, Revd Dr Rebecca Dudley, Danny Hailes. Inset: Fiona McClenaghan & Stephen Christensen (*Chair of the Governance Committee*).

Chair's report

Tēna koutou katoa

The annual report is an opportunity for us to look back and give thanks for the work that has been done in the last year and acknowledge the many people who have generously contributed their time, skill and energy to the mission of PSO.

PSO is lucky to have the support of many volunteers across all our services and at a governance level. We simply could not do the work that we do without our amazing volunteers.

In the last year several volunteer board members finished their terms with PSO. We are grateful for Craig Wyatt, Stephen Willis, Jessica Palmer, Tania Povey, Dave Bainbridge Zafar and Gillian Musuka. Each of these talented individuals selflessly gave their precious time and expertise to the PSO Board and governance committees and we are richer and better for it.

In the first half of 2025 we advertised vacancies on our Board and were greatly encouraged by the calibre and passion of the people who applied to join us. We are delighted to welcome Rebecca Dudley, Kurt Thomas, Julie Loan, Fiona McClenaghan and Vicki Botting to the Board. I also want to acknowledge Danny Hailes who joined the Board in June 2024.

At the start of 2025 the Board and Senior Leadership Team had a wonderful day together at Ross Home where we gave ourselves the opportunity to dream big and express our vision for PSO and the role that it plays in the Otago community. This was the beginning of our work on a new Strategic Plan for PSO which will be presented at the 2025 AGM. It was exciting for me to see that we have a shared vision and shared commitment to think longer term and intergenerationally about how we can benefit communities in the Otago region and build a brighter future together.

Our vision remains that every person is valued and grows in a safe and strong community. Grounded in our Christian faith we will continue to call out injustice and advocate for positive social change. We are inspired by the interconnected rivers of Te Wāi Pounamu and reminded of the importance of connection, relationships, collaboration and innovation as we navigate our future together.

Nāku iti nei, nā

Stephanie Pettigrew
Board Chair

Chief Executive's report

This has been a year of resilience, change, and quiet determination. The national picture remains challenging — government fiscal restraint has meant tighter public funding, service reductions, and mounting pressures on families across Otago. We see the human impact daily: people facing food insecurity, older people waiting longer for health care, and whānau under stress as the cost of living bites harder.

Yet in the face of this environment, PSO has finished the year ahead of budget, a significant achievement that reflects both discipline and heart. Occupancy across our Enliven homes has lifted steadily and stayed high, driving stronger revenue. Staff turnover has improved and stabilised, and our financial stewardship has allowed us to keep supporting those who need us most, even as demand grows.

We have been proud of the quality and integrity of our services. Audit results this year were very positive, with our clinical and operational teams receiving accolades for the care, safety, and wellbeing provided. Our Family Works services renewed all contracts, with government and community partners recognising our unique ability to provide wrap-around, holistic support — any door being the right door. We also marked a turning point in our response to the Royal Commission of Inquiry, offering a public apology at our AGM and completing the substantive commitments required of us. The blessing of our building and commissioning of a taonga signalled a new chapter for PSO, grounded in accountability, trust, and growth.

There were many moments of pride in our community engagement. Octacan once again set a record, reminding us of the generosity of Otago people even in times of personal hardship. Our links with local rūnaka have begun to deepen, and our relationship with Presbyterian churches and the wider Presbytery has been renewed in meaningful ways. These connections remind us that we are not alone in this work — we are part of a wider movement of care and hope.

Leadership renewal has also been a theme. Key leadership roles have been appointed across the organisation, including in Family Works; Enliven; People, Culture & Capability; Engagement & Development, and chaplaincy. With new leaders in place and seasoned wisdom still guiding us, PSO is well positioned for the future.



Robbie Moginie, Chief Executive

None of this would have been possible without our people — the staff, volunteers, and donors whose commitment and generosity carry PSO through. Whether through clinical excellence, practical support, or a simple act of aroha, you are the heart of this organisation.

Looking ahead, our new Strategic and Annual Plan charts a clear course. It calls us to reimagine our places and spaces, embed a restorative culture, grow our financial independence, and build networks of excellence with our partners. It is ambitious, but the need in our communities is great — and we are determined to meet it.

“Whāia e koe ki te iti kahurangi; ki te tūohu koe me he maunga teitei.”

Seek that which you treasure most dearly, should you bow your head, be it to a lofty mountain.

Ngā mihi nui,

Robbie Moginie
Chief Executive

SENIOR LEADERSHIP TEAM



Robbie Moginie
Chief Executive



Nicole Devereux
General Manager -
Family Works



Michelle van Kampen
General Manager -
Enliven Services



Phillippa Henshaw
People, Culture and
Capabilities Manager



Ronda Keen
Executive
Administrator



Andrew Borthwick
Finance Director

Our supporters

We are incredibly fortunate to have such strong support from people across our community.

The generosity of our volunteers – gifting their time and energy – enables us to continue supporting others, even during these challenging financial times. Whether it's alleviating isolation among older people, assembling food parcels, or mentoring young people through our Buddy Programme, our volunteers consistently step forward to help.

We are deeply grateful. Thank you.



Kay McMurtie volunteer and hat knitter with Christine Moffat, North Otago Buddy Programme Coordinator

Volunteer impact in our community

Our volunteers gift their time across our Enliven services, Family Works services, events and retail shop.

640

Volunteers

65,867

Volunteer hours

\$1,547,875

What our volunteers are worth if they were paid the minimum wage of \$23.50

Kay's kindness gives warmth while supporting Young Buddies

When it comes to making a difference, it's often the small, thoughtful gestures that leave the biggest impact. Kay McMurtie, one of our dedicated Adult Buddies, embodies this spirit of generosity and creativity.

Combining her love of knitting with her passion for supporting young people in the Buddy Programme, Kay hand-knitted a collection of cosy hats and sold them to friends and members of the community. With the funds raised, she purchased 13 movie tickets for young buddies – giving them the chance to enjoy a fun outing they might not otherwise have experienced.

Kay's thoughtful initiative not only brought joy to the young people involved, but also serves as an inspiration to others in the community. A passionate and proactive volunteer, Kay is helping to spread the word about the Buddy Programme and encouraging others to find their own unique ways to give back.

Her story is a beautiful reminder that generosity comes in many forms – and that one person's creativity and care can ripple out to brighten many lives.

Family Works Services

Kia ora koutou katoa.

As we end one year and look to the next, it provides pause for thought and reflection. As a new member of the PSO and Family Works whānau, it has been an absolute privilege to join such an incredible team and, in equal measure, a daunting task to step into the shoes of Deb Gelling who had been in the role as Acting Family Works Director.

Deb's sound and knowledgeable leadership has been instrumental in Family Works' ability to effectively navigate a period of significant change, ensuring that our kaimahi (staff) and services have continued to be well supported and well delivered.

Over the last 12 months we have continued to support our Ōtākou (Otago) whānau and communities, many of whom have faced increasing challenges. High costs of living, low-wages, health issues and housing instability are just some of the factors placing more pressure on individuals and whānau with less services available. We have seen increasing need for support, particularly from our Foodbank and Financial Mentoring services and within this, are seeing whānau and individuals with a greater complexity of need. Our advocacy at an individual and system level continues to be a critical part of our mahi.

We have again seen the incredible support from our volunteers and communities in action. Octacan was successful in securing over 18,000 items for the foodbank, funding received from Central Lakes Trust enabled us to expand delivery of the Buddy and Group Programmes in Central Otago and the Runway Revival: Wear to Care event saw vital funds raised for Family Works services.

While we have been impacted by the government reprioritisation of funding, largely we have been fortunate in retaining our existing investment. Ongoing changes to the funding landscape, however, have impacted and will continue to impact our service delivery both directly and indirectly. As always, our ongoing relationships and collaboration with partners across sectors and communities will be fundamental to our collective ability to navigate the impact of these ongoing changes on our whānau and communities. A renewed focus on Social Investment and the opportunities that this presents for us will be a key consideration in how we view and deliver our mahi in the year ahead.

I feel fortunate to be walking alongside a great team as we face the year ahead and know that our history provides us with a strong foundation upon which to continue to grow.

Nicole Devereux
General Manager - Family Works

Kia whakatōmuri te haere whakamua.

I walk backwards into the future with my eyes fixed on my past.

How many we helped

5,852

Family Works clients
(▲ 4% increase)

29,352

Family Works client contacts
(▲ 9% increase)

4,974 + 282

Food parcels supplied
Christmas meal boxes
(▲ 9% increase)

217

Children who participated in Family Works programmes

Where we helped

(Excluding our Dunedin Foodbank, which accounts for 42% of our clients overall)




Familyworks

✱ Presbyterian Support Otago

**Name and image changed to protect privacy (stock image)*

A Match That Matters

At just 11 years old, Thomas* was referred to The Buddy Programme by Oranga Tamariki. He had to wait two years for a match – not because we weren't looking, but because recruiting male Adult Buddies can be a real challenge. We take great care to ensure every pairing has the right connections, and that takes time.

When his match finally came through, it was thanks to one of our current Adult Buddies chatting about his experience with his colleagues at Unison, the company that maintains Dunedin's power lines. This Adult Buddy had already made a huge difference to his first young buddy and was now supporting his second. Known for his positivity and passion, he regularly shared stories about the programme. His enthusiasm encouraged a colleague to step forward – and that colleague is now matched to Thomas as his Adult Buddy.

From their very first outing, Thomas came home smiling. Since then, he now runs out the door to greet his Adult Buddy. The two have shared kai (food) and conversations, with the Adult Buddy gently encouraging journaling and open kōrero (conversations) about feelings. Through this, he models what it means to reflect, set goals, work hard, and know your own worth.

And the newly matched Adult Buddy's words after his first visit with Thomas? "He's a good kid, man." And he is – especially with a community of support believing in him.

The Buddy Programme helps build connections, offering consistent, caring relationships that can change the course of a young person's life. It's not just about one match – it's about growing a network of belief, belonging, and hope. This is only possible when the entire community steps up – when workplaces, whānau, and volunteers come together to support our tamariki (children).

"Nāu te rourou, nāku te rourou, ka ora ai te iwi."

With your food basket and my food basket, the people will thrive.

Client numbers by service

Parenting programmes & groups	64
Children's group programmes	81
Buddy Programme	136
YouthGrow students	23
Social Work clients	738
Foodbank clients (Immediate Assistance)	2,426
Financial Mentoring clients	1,413
Financial other (ERANZ, Energy Mates)	282
Stepping Stones	65

What our clients say about us

84%

of clients report improved relationships

90%

of clients say they learnt useful new skills/strategies

96%

of clients say they met their goals

93%

of clients say our services were accessible

Enliven Services

I was pleased to join Presbyterian Support Otago as General Manager - Enliven Services in early September 2024, following a period of transition and change. I acknowledge the leadership of Robbie Moginie, who held the reins in an interim capacity prior to my arrival, along with our experienced Enliven team who ensured the continued delivery of high-quality care.

This year has seen a significant improvement in our financial performance, a testament to the outstanding mahi of the entire Enliven team and the excellent reputation of our care homes, which has supported consistently high occupancy. Across our care homes and community programmes, staff have demonstrated unwavering commitment to person-centred care, and their efforts have been instrumental in strengthening both our operational and financial position.

A significant event during the year was the confirmation of our exit from the management agreement with Aspiring Care. At the time of writing, we are also in the due diligence phase for the potential sale of Elmslie House and Wanaka Retirement Village. Should the sale proceed, it will mark the end of Enliven Services' presence in Wanaka. However, our commitment to the Central Otago community remains strong, with Ranui and Castlewood continuing to provide care in Alexandra, and Family Works maintaining vital social support services in the region.

We welcomed new leadership at several care homes: Colleen Coop joined as Manager of Ross Home, Andrea Cairns stepped into the role at Iona Home and Hospital, and Stephenie Leith transferred to Holmdene Care Home, bringing valuable experience and continuity.

Our Club Enliven and Dementia Mate Wareware day programmes continue to play a vital role in helping older people stay connected and engaged. These services foster community, enhance wellbeing, and provide essential respite for whānau and caregivers.

Sadly, we lost our Clinical Nurse Adviser, Lynley Chirnside, following a period of illness. Her passing was deeply felt across the organisation, and we honour her contribution to the care and wellbeing of our residents and staff.

Looking ahead, I remain optimistic and deeply grateful for the dedication of our people.

Michelle van Kampen
General Manager - Enliven Services

How many we helped

827

Residents in our care homes
(170,892 days of care)

37,750

Meals on Wheels delivered

172

Older people attending Club
Enliven day programmes
(3,396 attendances)

5

Older people being supported
by a Visiting Volunteer

30

Clients supported by the
Individualised Funding
contract

89%

of residents and relatives
agree "This support
service has made a positive
difference to my life".





STORY FROM ST ANDREWS CARE HOME

A Memorable Journey: The Seaside Volcanic Train Trip

The residents and families of St Andrews embarked on an unforgettable adventure aboard the "Wild Seaside Volcanic Train Trip" in May. The excitement was palpable, as many residents had never experienced the scenic train ride up the coast before. The journey began with a bit of a challenge, as getting everyone to the train station required the combined efforts of staff, families, and volunteers. Thanks to the assistance of Dunedin Railways staff, everyone was soon seated and ready to embark on the journey.

As the train travelled along the harbour, memories began to surface. One resident reminisced about their market garden at Blanket Bay, while another excitedly pointed out their house in Port Chalmers. The long Mihiwaka tunnel brought back childhood memories for one resident, who recalled the thrill of running through the tunnel before a train would come, despite their parents' warnings.

The scenic views continued as the train passed through the sandstone cutting, revealing the breathtaking landscapes of Waitati and Warrington. One resident, a former volunteer on the excursion train, took in every moment of the trip, made even more special by the presence of their partner, who came on the trip along with many other families and friends.

As the train headed back along the harbour, the full moon rising above Portobello added a magical touch

to the journey. The comment, "We do live in such a beautiful place," resonated with everyone on board.

In the days following the trip, residents excitedly shared their experiences, and family members expressed their gratitude for the opportunity to join their loved ones on such a special outing. Those who missed the trip listened intently to the stories and vowed to join the next adventure. The trip not only provided a memorable experience but also strengthened the bonds between residents, families, and staff, fostering a sense of community and support.

Our care homes are more than just a supported living environment, they are a home – one with lots of friends, activities, nutritious meals and care. Outings are a vital part of feeling connected to the community and create both excitement leading up to the outing, as well as prompting a lifetime of memories to talk about.



9*

Residential Aged
Care Homes

3**

Retirement
Villages

2

Rental cottage
locations

3

Locations for
day programmes

*Seven care homes after the Management of Aspiring Care exited in August 2025 and sale of Elmslie House in October 2025.
 ** Two retirement villages after the sale of Wanaka Retirement Village in October 2025.

How you helped

910

Donors

222,524

Gift-in-kind items
were donated

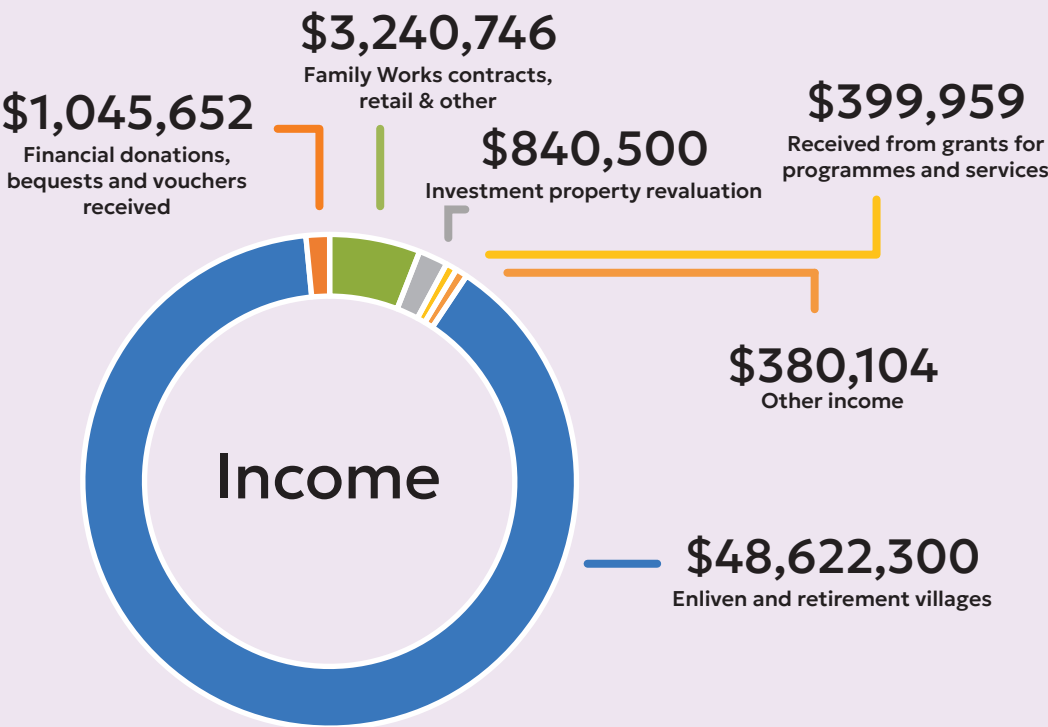
Thank you to our supporters

We are incredibly fortunate to have so many people supporting our work within the community.

Whether its gifts-in-kind, financial donations or our volunteer's valuable time, you make a real difference.



The year in dollars



\$54,529,261
Income

\$55,145,758
Expenditure

\$616,497
Net deficit

Summary General Purpose Financial Report

Presbyterian Support Otago Incorporated
Summary Consolidated Statement of Service Performance
For the Year ended 30 June 2025

Enliven Services

Presbyterian Support Otago (PSO) owns and operates nine aged care facilities in Dunedin (Ross Home and St Andrews), Mosgiel (Taieri Court), Oamaru (Iona), Balclutha (Holmdene), Alexandra (Ranui and Castlewood) and Wanaka (Elmslie House and Aspiring Enliven Care Centre). Via its subsidiary PSO Retirement Villages Limited, PSO also owns and operates three retirement villages - Wanaka Retirement Village in Wanaka, Ranui Court in Alexandra and Columba Court in Oamaru. Combined, these villages offer 47 villas, apartments and cottages.

Enliven Residential Facilities	FY 2025	FY 2024
Total days of care provided	170,892	161,635
Total people served	827	828

Occupancy	FY 2025 Target	FY 2025 Achieved	FY 2024 Target	FY 2024 Achieved
Total	92.7%	94.1%	92.5%	89.4%

Number of residents accessing our retirement village services	FY 2025	FY 2024
Total residents in the year	57	54

Family Works

PSO Family Works provide a range of programmes and supports for individuals, youth and whānau. Our services include social work, a foodbank, financial inclusion and capability services, parent education programmes, youth and adult mental health support, a Buddy programme, child and youth development programmes, and family dispute resolution referral support.

Our values are the principles that guide the way we work with people. Family Works staff and services:

Family Works			
Children's Groups & Youth Development		2025	2024
• Buddy programme	• Number of matched young Buddies	136	172
• Youth development	• Number of active students	23	23
Financial Inclusion Services			
• Financial mentoring	• Number of clients accessing our services	1413	1289
	• Number of sessions	2445	3046
Social Work			
• Foodbank	• Number of food parcels provided	4974	4576
• Social work support	• People supported	738	441
Adult Mental Health			
• Stepping Stones	• Number accessing services	65	60
Ethnicity			
Ethnicity of clients accessing our services	• % of Māori clients total	19.5%	18.9%
	• % of Pacifica clients total	4.8%	4.9%
	• % of NZ European clients	56.4%	60.2%
	• % of other cultures	8%	6.8%
	• % Not stated	11.3%	9.2%

Presbyterian Support Otago Incorporated

Summary Consolidated Statement of Comprehensive Revenue and Expense

For the Year ended 30 June 2025

	Group 2025 \$000's	Group 2024 \$000's (restated)
Income		
Income from services	47,383	44,428
Sale of Goods	1,193	1,185
Donations, Grants and Bequests	1,446	1,149
Other income	1,463	3,106
Total Income	51,485	49,868
Expenditure		
Employment related	37,891	35,638
General operating	7,947	7,407
Office & Administration	3,502	3,121
Other expenditure	1,456	2,272
Finance Costs	299	340
Total Expenditure	51,095	48,778
Operating Surplus before increase in ORA expense	390	1,090
Increase in ORA Expense	335	915
Impairment losses	1,012	1,542
Net Operating Surplus / (Deficit) for year - Continuing Operations	(957)	(1,367)
Share of net surplus / (deficit) Joint Venture	-	(118)
Net Surplus / (Deficit) for the Year - Continuing Operations	(957)	(1,485)
Net Surplus / (Deficit) for the Year - Discontinuing Operations	341	393
Total Comprehensive Revenue and Expense	(616)	(1,092)

Summary Consolidated Statement of Changes in Net Assets / Equity

For the Year ended 30 June 2025

	Group 2025 \$000's	Group 2024 \$000's
Opening Balance of Equity	58,471	59,563
Plus:		
Total Comprehensive Income	(616)	(1,092)
Closing Balance of Equity	57,855	58,471

Summary Consolidated Statement of Financial Position

As at 30 June 2025

	Group 2025 \$000's	Group 2024 \$000's
Equity	57,855	58,471
<i>Represented by :</i>		
Current Assets	32,614	29,571
Non-Current Assets	57,776	60,229
	90,390	89,800
Current Liabilities	32,535	31,329
Non-Current Liabilities	-	-
	32,535	31,329
Net Assets	57,855	58,471

Signed for and on behalf of the Board as at 24th September 2025:

Mrs Stephanie Pettigrew
Chairperson

Mr Stephen Christensen
Trustee



Presbyterian Support Otago Incorporated

Summary Consolidated Statement of Cash flows For the Year ended 30 June 2025

	Group 2025 \$000's	Group 2024 \$000's
Net Cash flows from Operating Activities	2,271	(1,370)
Net Cash flows to Investing Activities	(717)	450
Net Cash flows to Financing Activities	299	219
Net Cash Flow	1,853	(701)
Opening Balance at 1 July	2,553	3,254
Closing Balance at 30 June	4,406	2,553

Notes to the Summary Consolidated Financial Statements For the Year ended 30 June 2025

These are the consolidated summary financial statements of Presbyterian Support Otago Incorporated group for the year ended 30 June 2025.

The specific disclosures included in these consolidated summary financial statements have been extracted from the full annual consolidated financial statements authorised for issue by the Board on 24 September 2025. The full annual consolidated financial statements have been prepared in accordance with Generally Accepted Accounting Practice in New Zealand (NZ GAAP) and they comply with the Public Benefit Entity (PBE) Accounting Standards applicable to not for profit entities.

This consolidated summary financial report does not include all the disclosures provided in the full consolidated financial statements and cannot be expected to provide as complete an understanding as provided by the full consolidated financial statements.

An unmodified audit opinion dated 24 September 2025 has been received on the full consolidated financial statements for the year ended 30 June 2025. A copy of the full consolidated financial statements for Presbyterian Support Otago Incorporated for the year ended 30 June 2025 may be obtained by contacting Presbyterian Support Otago on (03) 477-7115 or by writing to PO Box 374, Dunedin.

These consolidated summary Financial Statements have been examined by our auditors for consistency with the full consolidated financial statements. These Consolidated Summary Financial Statements were approved for issue by the Board of Presbyterian Support Otago Incorporated on 24 September 2025.

Basis of Preparation

Presbyterian Support Otago Incorporated is a public benefit entity and was registered on 12 October 1907 under the provisions of "The Religious, Charitable and Educational Trust Board Incorporated Act 1884" (now the "Charitable Trusts Act 1957").

These consolidated summary financial statements of Presbyterian Support Otago Incorporated have been prepared in accordance with PBE FRS 43: Summary Financial Statements. The presentation currency is New Zealand dollars, rounded to the nearest whole thousands (\$000's).

Specific Accounting Policies

All specific accounting policies have been applied on the same basis as those used in the full consolidated financial statements of Presbyterian Support Otago Incorporated.

Auditor's report



BDO CHRISTCHURCH AUDIT LIMITED

REPORT OF THE INDEPENDENT AUDITOR ON THE SUMMARY GENERAL PURPOSE FINANCIAL REPORT TO THE TRUSTEES OF PRESBYTERIAN SUPPORT OTAGO INCORPORATED

Opinion

The summary general purpose financial report was derived from the audited general purpose financial report of Presbyterian Support Otago Incorporated ("the Society") and its subsidiary (together, "the Group") for the year ended 30 June 2025.

In our opinion, the accompanying summary general purpose financial report is consistent, in all material respects, with the audited general purpose financial report, in accordance with PBE FRS-43: *Summary Financial Statements* issued by the New Zealand Accounting Standards Board.

Summary General Purpose Financial Report

The summary general purpose financial report does not contain all the disclosures required by Public Benefit Entity Standards issued in New Zealand. Reading the summary general purpose financial report and the auditor's report thereon, therefore, is not a substitute for reading the audited general purpose financial report and the auditor's report thereon. The summary general purpose financial report and the audited general purpose financial report do not reflect the effects of events that occurred subsequent to the date of our report on the audited general purpose financial report.

Other Information

The trustees are responsible for the other information. The other information comprises the information included in the Chairs Report, the Chief Executives Report, Family works report, Enliven Services report, Years in Dollars and Acknowledgements, but does not include the summary general purpose financial report and our auditor's report thereon.

Our opinion on the summary general purpose financial report does not cover the other information and we do not express any form of audit opinion or assurance conclusion thereon. We have read the other information and, in doing so, considered whether the other information is materially inconsistent with the summary general purpose financial report, or our knowledge obtained in the audit of the summary general purpose financial report or otherwise appears to be materially misstated. We have nothing to report in this regard.

The Audited General Purpose Financial Report and Our Report Thereon

We expressed an unmodified audit opinion on the audited general purpose financial report in our report dated 24 September 2025.

Trustees' Responsibilities for the Summary General Purpose Financial Report

Trustees are responsible on behalf of the Society for the preparation of the summary general purpose financial report in accordance with PBE FRS-43: *Summary Financial Statements*.

Auditor's Responsibilities for the Audit of the Summary General Purpose Financial Report

Our responsibility is to express an opinion on whether the summary general purpose financial report are consistent, in all material respects, with the audited general purpose financial report based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) (ISA (NZ)) 810 (Revised) *Engagements to Report on Summary Financial Statements*.

Our firm carries out other services for the Group in the areas of Trust Deed Compliance services in the form of separate Deed of Supervision report. The provision of these other services has not impaired our independence as auditors of the Group. Other than in our capacity as auditor and the above services, we have no relationship with, or interests in, the Group.

Who we Report to

This report is made solely to the Society's trustees, as a body. Our audit work has been undertaken so that we might state those matters which we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Society and the Society's trustees, as a body, for our audit work, for this report or for the opinions we have formed.

BDO Christchurch Audit Limited

BDO Christchurch Audit Limited
Christchurch
New Zealand
24 September 2025

Acknowledgements

We gratefully acknowledge the support of the entire Otago community. Bequests, grants, gifts and donations are an important part of our income and make it possible for us to carry out our work each year.

Grants

ACE Shacklock Charitable Trust
Central Lakes Trust
Children's Recreational Enterprise Support Trust (CREST)
Colin G. L. Jones Trust
David Ellison Charitable Trust
Downie Stewart Lawyers
Dunedin Casino Charitable Trust
Dunedin City Council
Estate of JDS Roberts
Graduate Woman Otago
John N Lemon Charitable Trust
Kiwi Gaming Foundation Ltd
Mackerras Cogan Fund
Mercy Hospital Dunedin Limited
New Zealand Lottery Grants Board
Otago Community Trust
Otago Masonic Charitable Trust
Patricia France Charitable Trust
Rotary Club of Dunedin (Inc)
Russell Henderson Charitable Trust
St Joans Trust
Strathlachlan Fund
The Campbell Charitable Trust
The Presbyterian Church Property Trustees (incl McGruer Est and Social Service Fund)
The Timothy Blair Trust
The Tindall Foundation
Yarrow South Charitable Trust

Gifts-in-kind

192 Castle College
Abbotsford School
Acorn Furniture
Agreeable Nature
Alcala Motor Lodge
All Saints Anglican Church
Allied Press
AM I FIT Group Fitness Training
Anderson Lloyd
Animation Research & Virtual Eye
Aon NZ
Arete Physiotherapy
Arjo
Arrow Uniforms
Arthur Street School
Ashburn Clinic
Audiology South Dunedin
Aurora Health Centre
B@tCH
Balaclava School
Balmacewen Intermediate
Bayfield High School
Bayfield Kindergarten
Bear Park Childcare Centre
Beca
Bellamys Gallery
Better Moves
BFT Kensington
BGIS Retrofit
Bidfood
Big Save Furniture
BL Stringer
Blacks Road Grocer & Café

BLENNZ Homai Campus
Boffa Miskell Dunedin
Bond Massage
Breen Construction
Bronz Otago Inz.
Business South - Otago Chamber & Southern Employers
Campbells Butchery
Casa Nova Kindergarten
Challenge Marketing Ltd
Children's Outpatients Ward
Church of Christ
Clearwater Wildlife Tours
Coastal Unity Parish
Cobb & Co.
Columba College Staff
Community Care Trust
Community Food Harvest
Cookie Time Otago
Cowell's Genuine Pavlovas
Cubro
Danish Delights
Deloitte
Dentistry on Highgate
Department of Preventive and Social Medicine
Dunedin Children's Choir
Dunedin Christadelphian Ecclesia
Dunedin City Baptist Church
Dunedin City Council
Dunedin City Council Art Gallery
Dunedin City Motors
Dunedin Community Corrections
Dunedin Ghost Tours
Dunedin Harbour Rotary Club
Dunedin Kia
Dunedin North Intermediate School
Dunedin South Presbyterian Church
Dunedin-Edinburgh Sister City Society
East Taieri Gardens
East Taieri Presbyterian Parish
EBOS
Ecolab
Edna McCulloch Kindergarten
Emersons
EnviroNZ
Equippers Church
Experience Dunedin
Fable Hotel
Fashion Uniforms
First Church
Fisher & Paykel
Flagstaff Community Church
Fleetpartners
Fonterra
Frances Hodgkins Retirement Village
Fresh Choice Green Island
Fresh Choice Roslyn
Gallaway Cook Allan
Glen Warren Kindergarten
Good Bitches Baking
Goodman Fielder New Zealand Limited
Grant's Braes Kindergarten
Grant's Braes School
Green Island School
Greenpark School
Greggs Coffee
Halfway Bush SAYGO Exercise Group
Haraway and Sons Limited
Harvey Norman Commercial
Holmes Kindergarten

Honey by Wrights
Inland Revenue Dunedin
John McGlashan College
Kaikorai Presbyterian Church
Kaikorai Valley College
Kainga Ora
Kiddies Campus
King's High School
Kiwi Harvest
KiwiRail
Knox Church
Knox College
Koputai Early Childhood Centre
Kowhai Bush Farms
Kurow Presbyterian Church
Lawrence/Waitahuna Presbyterian Parish
Liberton Christian School
Luna Restaurant
Macandrew Bay School
Maheno Kindergarten
Maniototo Adventure Park
Maniototo Presbyterian Church
Maori Hill Friendship Club
Maori Hill School
Marks & Worth
McArthur and Symons Electrical
Meat the Need
MediaWorks (Radio) Otago
Mercy Hospital Dunedin Limited
Ministry of Education
Mitre 10 MEGA Dunedin
Mobility Solutions/Otago Auto Trimmers
Monday Night Ladies
Morningson Presbyterian Church
Morningson School
Mosgiel Community Foodbank
Motion Health Hanover Street Dunedin
MTF Dunedin
Musselburgh Baptist Church
Musselburgh School
MyFoodBag
New World Gardens
Night Shelter Trust Dunedin
NXP
NZ Blood Service
NZME
Olveston Historic Home
One By One Rescue
Opoho Presbyterian Church
Orokonui Ecosanctuary
Otago Auto Trimmers
Otago Boys' High School
Otago Community Hospice
Otago Girls' High School
Otago Polytechnic
Pacific Radiology Otago
Pak'n Save Dunedin
Palmerston/Dunback Presbyterian Church
Pearsons Coachlines
Pioneers Russell Street
Platinum Recruitment
Port Chalmers Four Square
Port Chalmers Womens' Institute
Port Otago
Precinct Food
Pro Civil Construction Limited
Ranui Court Retirement Village
Regional Councillors
Renegade Hair
reThink Children's Therapy
Rippon Vineyard
Ritchies Transport Dunedin

Rockgas Limited
Roslyn Kindergarten
Ross Dowling Marquet Griffin
Rotary Club of Dunedin
Rotary Park Kindergarten
Salmond College
Salvation Army
Sara Cohen School
Save Money Skips
Sawyers Bay Community Gardens
Sawyers Bay Presbyterian Church
Scott Technology
Scouts New Zealand
SLR Consulting
South Dunedin Baptist Church
Southern District Police
Southern Hospitality
Southern Presbytery
SPCA Dunedin
Speedy Signs
Speights Ale House
St Andrews Church
St Brigid's School
St Clair Kindergarten
St Clair Primary School
St James Palmerston
St James Presbyterian Church
St Joseph's Cathedral School
St Kilda Scout Group
St Martin's Anglican Parish
St Philips Church Grants Braes
St Stephen's Leith Valley Presbyterian Church
Steve Mowat Building
Strictly Coffee Company
Summerset at Bishopscourt
SuperGrans Dunedin Charitable Trust
Synergy Wellness
Taieri Community Garden
Tainui Croquet Club
Tainui School
TAK Flooring
Te Kura Kaupapa Maori o Otepoti
Te Whatu Ora Southern
The Church of Jesus Christ of Latter-day Saints
The Dunedin Club
The Rotary Club of Taieri
The Warehouse Limited South Dunedin
Trends (Tuapeka Gold Print)
Trents Wholesale Limited
Trinity Catholic College
Turners and Growers Limited
United Church of Port Chalmers
United Scaffolding Dunedin
University of Otago
Waikouaiti Karitane Parish
Waitaki District Council
Wakari Hospital
Warehouse Stationery
Westpac
Wildwood Flowers
Woolworths Dunedin Central
Work And Income - South Dunedin
Work And Income Mosgiel
WorkSafe New Zealand (Dunedin office)
York Place Preschool & Nursery
Zeagold Foods

Enliven Services

Residential aged care homes

Castlewood, Alexandra
Holmdene, Balclutha
Iona, Oamaru
Ranui, Alexandra
Ross Home, Dunedin
St Andrews, Dunedin
Taieri Court, Mosgiel

Retirement villages

Columba Court, Oamaru
Ranui Court, Alexandra

Rental cottages

Iona Cottages, Oamaru
Ross Home Cottages, Dunedin

Community-based services for older people

Club Enliven, Dunedin/Taieri/Alexandra
HomeShare, Alexandra
Mate Wareware Home Share, Oamaru, Balclutha
Individualised Funding
Visiting Volunteers, Dunedin

Family Works Services

Social services

Community Foodbank
Social Work
Stepping Stones
YouthGrow

Financial & budgeting

EnergyMate
Financial Mentors
Money Mates

Parenting, support and children's programmes

Buddy Programme
Grandy's Group
Growing Taller
Incredible Years
Strengthening Families

Retail shop

Shop on Carroll

169 Princes Street, Dunedin
03 471 8249
Online shopping: shoponcarroll.org.nz



Strategic Plan

Our new Strategic Plan is now available on our website. This strategy outlines our strategic priorities for the next five years, focusing on key areas that will drive our organisation forward.

As a long-standing social service provider in Otago, we have the opportunity to lead, facilitate, and invest in a collaborative approach to deliver Our Vision (Tō Mātou Matawhānui) - Every person is valued and grows in a safe and strong community. As economic change and uncertainty increase, we also face increasing challenges. We seek to call out injustice and advocate for positive social change.

In this plan, we are clear that our response is strongly collaborative and requires partnership with mana whenua in Ōtākou (Otago). We set out our strategic priorities over the next five years that lay a foundation for impacts and outcomes that benefit the communities of the region to 2035 and beyond. Over the next five years, we aim to stabilise and improve PSO's financial wellbeing as a fundamental pillar of our own sustainability, reinforcing our ability to promote social justice and support our community.

Join with us as we strive to build stronger connections, deepen our impact, and create lasting change. Together, we can work towards a brighter future for everyone in Otago.