



# Annual Report

## 2021-2022



## FOREWORD

Tēnā koutou katoa, Tālofa lava, Mālō e lelei, Ni sa bula vinaka, Namaste, Kia orana, Taloha ni, Ia orana, Fakaalofa lahi atu, 'Alii, Malo ni, Halo Olaketa, Mauri, Aloha mai e and warm Pacific Greetings to you all.

***‘He tangata kē koutou, he tangata kē mātou, engari i tēnei wā, tatou tātou e’  
You are diverse, we are diverse, but in the final analysis we all belong***

What I have come to realise this year is that in the business of getting things done the NEC often forgets to communicate to you our members what we have been doing. The hundreds of hours we put to do ‘the things’ often means we just don’t get around to celebrating and communicating with you. The annual report is a great opportunity to show off the hard work and I hope that you will be proud and celebrate with us, all the major milestones and achievement that has been packed into the 2021-2022 financial year.

Much of what has been achieved has been done online, emails and through phone calls as the NEC has not been able to meet in person as a committee since before the last AGM. When I reflect on the hundreds of meetings, emails and phone calls, the discussions, and decisions the interviews and farewells, I am in awe of what can be done during a pandemic when you have fabulous people who are passionate about their association. I want to thank each and every one of the people who contributed to CDANZ through their branch or the National Executive Committee or by attending events or completing surveys in the last year. I believe we have made some great leaps that will support CDANZ for many years to come.

In the last annual report, I said there would be many more changes to come for CDANZ and I wasn’t wrong. We have farewelled much loved contractors Koa Saxby and Lauren Hughes and welcomed Kris Anderson as a new General Manager and Julie Pope as the new Membership Administrator. These are new roles for the association with the changing nature of the association’s needs and with a view to our continued sustainability.

This year also saw the implementation and launch of our new Customer Management System and Website. It included integration with Xero and the change to online Professional Development and renewal progresses. Robyn Cannell, Hana Lambert and Denise Raymond on the NEC have each supported this project across the line. We have spent much of this year navigating the new membership structures, trouble shooting and refining the processes. This has been an all-consuming task involving the whole NEC at times and Kris and Julie who have not only had to learn the systems but also our members. While we miss Koa and Lauren and the accumulated wealth of knowledge Julie and Kris are stepping into their

shoes well and I am sure as you interact with them they too will become part of the CDANZ family. We know the CRM isn't perfect yet, we have already started a process of review to fix problems and make the system better and we welcome suggestions and feedback - but also your patience. What we are asking is that **all members** go in and complete their profiles. This is a really important step that many of you are yet to complete. We use the information for many things and without good data it is making the NEC job in advocacy and sustainability planning impossible. Anyone on the NEC or Kris will be happy to assist.

In the advocacy space, we have been very busy as we take on a higher profile role than had been asked of the NEC when CareersNZ existed. We are now invited on to the Advisory Panel as the norm, and I hope we can continue to grow in this space to have an impact for members and the people of Aotearoa.

In 2020-2021 one of my main advocacy pushes was our campaign push for a National All Government Career Strategy something that most OECD countries already have. We collaborated with CATE to write letters to the Ministers, which resulted in a meeting with Minister Hipkins, and finally in December 2021 an official announcement that CDANZ and TEC would work together to achieve a new National Career System Strategy. As I write this, the Advisory Panel has met twice to agree the current state and look to what we would like the future to be. Watch this space - we will be asking for members input very soon.

I continue to support the Direct Career Service in partnership with TEC and now MSD. The service continues to be refined after a fast and furious stand-up in 2020 for what was only going to be a service delivery until June 2021. There have been some transition problems in finding continued funding and changing how the service looks. Through the amazing work of the CDANZ career development professionals who have the contracts, CDANZ and TEC have been able to show the value we add and the difference we can make. A joint TEC and CDANZ report on the initial service delivery has helped to continue the service, which employs many CDANZ members across Aotearoa and is being continued through MSD in 2022 and beyond.

We have maintained an active role consulting and advising for the online career solution tool now called – Tahatū throughout 2020-2021 and now I represent CDANZ on the Industry Advisory Panel as the platform goes through the build process with a view to a 2023 roll out.

Cherie Perrow as Vice President and Educational Lead has been invaluable. Cherie has worked on many projects and has been instrumental in an ongoing discussion with TEC about improvements to the GATEWAY contracts. We continue to have discussion with the Ministry of Education and with CATE about more support and resources for Career Advisory

in Schools and the other programmes that are run in schools and hope that the work on the NCSS may support this.

I was going to try and list all the organisations and government departments the NEC talk to here but realised the list was far too long. Rest assured that not a week goes by without another government meeting, or a new advocacy and relationship being built to support CDANZ and have us recognised as professionals in career development.

PD this last year was disturbed but rich with Yvonne Gaut leading 2021. We were able to have a hybrid CareerX and a NZORC online as well as many webinars offered through the National Office but also from the Branches sharing their wonderful offerings more widely. Serena Tiaiti and Hana Lambert have stepped up to co-lead PD and we have already seen some amazing webinars. As we look to lessen the burden on the branch committee's we hope to be able to offer more from the National office.

I would like to thank Paula Rewi who is stepping down from the Vocational Advocacy Lead and the NEC for her commitment to this space. Paula has been a champion in the vocational area and has taught us much, but has also been an innovator and communicator for the members. Working together with Paul Fennessy, Paula has defined a role that we had not had before in the NEC and leaves a great legacy in the NZORC but also good relationships with ACC and MSD.

A huge thank you to Jennie Miller for all the work on the CDANZ Submission New Zealand Income Insurance Scheme. Thank you to all those who have contributed to our surveys this year. We do think very carefully before asking you to help us in this way. The information gained from these surveys is always used to benefit the membership in some way and carefully protected by the NEC.

Denise Raymond and the Membership and Evaluation teams have had a big year. It has been a big learning curve implementing the new membership structure which has added to the membership teams' workload considerably. I want to thank those who have worked on this. A special mention to Robyn Bailey who has stepped off as co-lead and our other now lead, Dale Furbish. We are very lucky to have had your levelheaded measured support in this team.

You will see in this report that many of the branches are struggling to fill the requirements to keep them constitutional. While we acknowledge the importance of coming together regionally the NEC is looking for ways to help the branches, alleviate the burden of compliance, and help to make them sustainable and fit for purpose for many years to come.

We have some great collaborative partnerships and are still developing more in Aotearoa and overseas. I would particularly like to thank CDAA and Peter Mansfield and CDAA president Linda Jefferies for their support and the collegial sharing of information. We look forward to a 2023 that brings CDANZ and CDAA members together in Aotearoa for Conference.

I would also like to acknowledge and thank the NEC and a couple of new people who have been attending meetings in anticipation of being voted onto the NEC - Cherie Perrow, Hana Lambert, Denise Raymond, Robyn Cannell, Serena Tiaiti, Hilary Scott-Ker, Paula Fennessy, Gabrielle Riley and Paula Rewi and Yvonne Gaut who stepped down in 2022.

Great job guys, well done!

***‘Ehara taku toa, I te toa takitahi, Engari he toa, Takitini’***

***‘Success is not the work of one, but the work of many’***



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# ASSOCIATION DIRECTORY 2021 – 2022

## NATIONAL EXECUTIVE COMMITTEE

### Officers of the Association

#### President

Heather Lowery-Kappes, Waikato/ Bay of Plenty

- **Advocacy Lead**

#### Vice-President

Cherie Perrow, Auckland

- **Advocacy Team – Education Lead**

#### Treasurer

Hana Lambert, Bay of Plenty

- **Professional Development Co-Lead**

#### Secretary

Hilary Scott-Ker, Napier/Hastings

### National Executive Committee

Serena Tiaiti, Otago/Southland

- **Professional Development Co-Lead**

Denise Raymond, Gisborne

- **Membership Committee Lead**

Robyn Cannell, Bay of Plenty

- **APCDA Country Director**

- **CRM Project Lead**

Paula Rewi, Napier/Hastings – April 2022

- **Advocacy Team - Vocational Rehabilitation Lead**

Yvonne Gaut, Otago/Southland -Feb 2022

- **Professional Development Lead**

### OFF EXECUTIVE SUPPORT

Gabrielle Riley

Paul Fennessy

Jennie Miller

## EMPLOYEE

Kris Anderson, **General Manager**

- **Branch Liaison**

## CONTRACTED POSITIONS / SERVICES

Julie Pope, Membership Administrator



Koa Saxby, National Administrator- Retired  
October 2021

Lauren Hughes, National Development Manager  
– September 2021

Fairground Accounting Chartered Accountants

Admit Bookkeeping

Auditor - Barry Signal

Koa Saxby wearing CDANZ  
leaving gift



Lauren Hughes wearing  
CDANZ leaving gift

## ACKNOWLEDGEMENTS

As an association, we are extremely lucky to have passionate people involved across key projects and portfolios on and off the National Executive Committee and Branch Committees. This is our opportunity to acknowledge and express our gratitude to these people who have played such important roles over the past year.

### DEPARTING EXECUTIVE MEMBERS

#### **Yvonne Gaut**



Yvonne Gaut came onto the NEC with a passion for the Tertiary careers sector and working in international student space. From Otago/Southland branch, Yvonne took on the Professional Development Lead in 2021. During a highly volatile time Yvonne's calm and considered approach allowed us to have two very successful large events in 2021 - the April CareerX that pivoted very quickly to a Hybrid event in-person and online and the 2021 New Zealand Occupational Rehabilitation Conference, which

changed to a purely online event in September. Hours of planning, sorting and curating goes into any webinar event or zoom event. What members see is the execution of many hours of discussion and decisions. Yvonne, like all NEC members, has contributed to the development and implementation of the new membership structure and the CRM. Yvonne's calm and considered input has been a significant and intuitive approach which has supported all those on the NEC to look at things from a multitude of perspectives while making important decisions. Yvonne stepped off the National Executive Committee (NEC) in February 2022 to enjoy more time with her new twin mokopuna and whanau. Our loss is her whānau's gain and we wish her well.

#### **Paula Rewi**

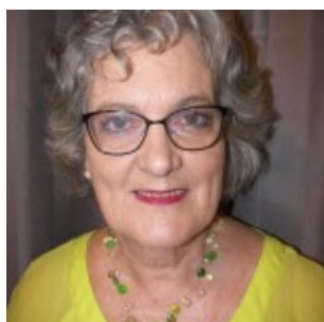


Paula Rewi is incredibly knowledgeable and passionate and likes to get things done. Paula often likes to stand back and let others take the limelight but rest assured Paula will have been the driving force that made things happen. Even before Paula stepped onto the NEC in 2018, she had had a big impact in CDANZ as the Gisborne / Hawkes Bay Branch Chair. She had been responsible for innovative professional development and a thriving local branch

community. Paula is the driving force behind the development of CDANZ's now Bi-annual New Zealand Occupational Rehabilitation Conference and the Development of an Advocacy Lead role for Vocational Rehabilitation Portfolio. Paula alongside other NEC members has

supported the NEC move to become a Te Tiriti o Waitangi (Te Tiriti) partner organisation and we accept her challenge to continue our journey. Paula has been on the NEC for the last four years in which time we have seen not only a significant increase in what NEC members have been asked to do but also in times of great change. Paula is passionate about vocational support and has been an invaluable asset for CDANZ in this space. She has developed strong relationships with key stakeholders such as ACC and MSD and also upskilled the NEC members who don't work in this area so that they have a better understanding of the mahi a third of our CDANZ members do. She has been an active and vocal voice for the CDANZ members who work MSD and ACC contracts and has been instrumental in making sure that communications between the various stakeholders have increased. Paula is a savvy social media user, sharing everywhere and whenever she can. It was Paula alongside Jennie Miller who started conversations which eventually lead to the Direct Career Guidance Service after Paula delivered training that highlighted the need for trained career development professionals to deliver this service. When Paula is excited about something nothing stops her, and we have been lucky to have her passion and expertise over the past years to drive us to do better. She has been the catalyst for many of our improvements in process and policy and development of skills in governance. Thank you Paula for your time and energy.

### **Robyn Cannell**



Robyn came onto the NEC because of her passion for the secondary career advising space in January 2020. She has been involved and contributed greatly to this area with her knowledge, insights, information, and her calm delivery of key points and message in advocacy meetings with the MOE and in written communications. Robyn delivers great punch lines, which get remembered. Robyn's impact in NEC meetings is often to quietly synthesize what we have been discussing, tying the threads together and asking that one core question that moves us forward. While Robyn came onto the NEC to contribute from the perspective of the secondary school advisor space she has contributed in invaluable ways across a number of core projects and in general NEC functions. Robyn doesn't always say a lot but when she does the NEC know we should listen. Robyn favourite phrase is "I don't know much but.....". What we all know on the NEC is that the delivery of that phrase means what Robyn says next will have great insight and wisdom. Robyn was CRM Lead in 2021- she would tell people she didn't do much again. Robyn checked and transcribed much of the old website content into the new website and had an often pivotal understanding of the overview of the project and was able to explain what was happening and why very

clearly for us to be able to make decisions. Alongside that Robyn has been the Country Director for APCDA for the last two years; supported, and attended meetings, submissions and insights for TEC and MoE advocacy. Robyn retired in 2020 and for much of 2021 Robyn worried that, as she wasn't a practicing career development professional that she wasn't a valuable member of the NEC. Those on the NEC know that without Robyn her wisdom, knowledge, critical listening skills and ability to get to the heart of the matter we wouldn't have come through 2021-2022 in such good shape. You will be missed Robyn but we are very happy to know that you will have a wonderful time sailing away.

## OTHER ACKNOWLEDGEMENTS

At a national level, a number of people have supported and contributed to the success of the Association outside of the National Executive Committee, including:

### **Advocacy - ACC**

Paul Fennessy - Auckland

### **Advocacy – Submission/ National Career Systems Strategy Working Group**

Jennie Miller - Auckland

### **Branch Committees**

**Northland** - Lisa Halvorson - President, Alysha Phillips -Secretary/Treasurer

**Auckland** - Chair & Treasurer– Vacant, Rebecca Moir – Secretary, David Sharples, Sarah Moyne, Victoria Swan

Stepping down after 22+ years of service Graeme Mackay

Stepping down after 20 years of service Gabrielle Greer – Treasurer 2021-22,

Also stepping down is Andrew Tui – Co-ordinator and Sue Staveley

**Waikato** - Natalie Sims & Claire Oehley - Co-chairs, Pratistha Purohit, stepping down - Lance Taylor– Treasurer

**Bay of Plenty** - Wendy Holden - Chair, Miriam O'Connor – Secretary, Nikki Wilson – Treasurer

**Gisborne / Hawkes Bay** - Christine Mason - Branch Leader, Hillary Scott-Ker- Secretary,  
Melanie Barrett - Treasurer  
Stepped down during the year Grant Hill, Jo Cumming

**Manawatu** - Ronica Sami – Chairperson, Tony Vincent – Secretary/Treasurer, Sue  
Cranston

**Taranaki** - Michelle Coronno - Chairperson, Mary Pollard – Treasurer, Tracey Howarth -  
Secretary

**Wellington** - Chair & Treasurer – Vacant, Susan Handisides – Key Contact, Lis Whyte –  
supporting  
Stepping down - Julie Thomas - Acting chair 2022

**Canterbury / Westland** – Chair – Vacant, Jude Mackwell – Treasurer, Paul Barclay, Lynda  
Clegg, Helen Dawson, Jan Kershaw, Michelle Staples, Claire Jackson  
Stepping down Penny Munro

**Nelson / Marlborough** - Raewyn Laurenson & Sam Young Co-Chairs, Eunice Creswell  
Treasurer

**Otago / Southland** – Krunal Patel - Branch Chair, Zita Matthews - Secretary, Claudine  
Usher -Treasurer,  
Stepping down - Jackie Dean, Jo Budai

### **Complaints Committee**

Merrie McDougall - Auckland  
Pat Cody - Northland

### **Māori and Pasifika Career Practitioners Rōpū Representatives 2022**

Dr Lynette Reid - Auckland  
Fiona Timoti-Knowles  
Andrew Tui – Auckland  
Blake Wong-Ling  
Riki Apa

## Membership Committee

Christine Manson - Hawkes Bay/Gisborne

Debbie Thomas - Canterbury/West Coast

## Evaluation Team

Robyn Bailey (recently stepped down) & Dale Furbish (co-leads), - Auckland

Chris Bridgman - Canterbury/West Coast

Wendy Holden - Bay of Plenty

Catherine McIntyre - Auckland

Jo Protzman - Bay of Plenty

## General Managers Report

Tēnā koutou,

It is with great pleasure that I contribute to my first AGM report since being appointed as General Manager just over six months ago.

I must begin by thanking the members and supporters of CDANZ for the very warm welcome and all the positive wishes since my arrival.

For any new individual to come into such a diverse and well-supported community such as the one within CDANZ it can be a daunting challenge to come up to speed and learn the inner workings of the organization. Through my introduction period, this transition has been made remarkably quicker through the support of many members whom I now look towards as not just colleagues but also now as friends.

In this vein, I must also comment on all the various partners that I have been lucky enough to engage with during the last few months ranging from governmental agencies, education providers, and not-for-profit organizations to our much-valued partners at CDAA, Diversity Works, NZ Disability Support Network, Smart Waikato, to name but a few.

To be involved in representing our diverse and unique organization at meetings and sing the praises of our members is something I never tire of, I look forward to many more opportunities to do so in the coming year ahead.

For those within our organization who I have not yet had the pleasure to meet, I look forward to the time when our paths cross so that we can not only discuss your journey within CDANZ but look towards how we can add value to your experiences in the future.

Nāku iti noa, nā

Kris Anderson



From top of picture clockwise: Kris Anderson  
– CDANZ General Manager, Hana Lambert  
\_ NEC Treasurer & Co- Lead PD, Heather  
Lower-Kappes -NEC President, Cherie Perrow  
- NEC Vice President & Education Lead

## A WORD FROM THE MEMBERSHIP ADMINISTRATOR

I can't believe it's now been almost nine months since I stepped into the role of Membership



Left to right: Julie Pope - National Membership Administrator, Denise Raymond - NEC Membership Lead, Paula Rewi- NEC VOC Lead

Administrator for CDANZ - time has flown by. There has been so much to learn, which has all taken time but has been made easier by the incredible support I have received from the CDANZ Team - our Executive; our General Manager, Kris; and also our members. I feel quite blessed to be involved with such an amazing team.

I stepped into this role at the time the new CRM, Member Connex was introduced to CDANZ and integrated with our new website. I find that not a month goes by that I don't learn something new about this system. I appreciate

that the introduction of this new system has also resulted in considerable new learning for our members in navigating the new website and entering Professional Development activities into the online system. For those members who have embraced this new system - well done! For those who are finding it more challenging - please reach out. I'm here to help.

Many of you would know that I work full time for the Open Polytechnic during the weekdays; and do my CDANZ work in the evenings and weekends. When I took on the role, I was keen for a new challenge - a new project. It most certainly has been that - life is busy, but good! Without question, the aspect of this role I enjoy most is dealing with our amazing members, and I'm getting to know as many of you as possible, by distance. One of my goals in this position is to make life just that bit easier for our Executive, who give so freely of their time - and also for our members, because without all of you - there would be no CDANZ. I look forward to getting to know more of you in the year ahead - and thank you for your patience and support while I have been settling into this new role.

Ngā mihi nui

Julie Pope

## SUSTAINABILITY

### MĀORI & PASIFIKA CAREER PRACTITIONERS RŌPŪ

CDANZ continues to grow and develop in its commitment to becoming a Te Tiriti o Waitangi (Te Tiriti) partner organisation, embracing both the journey and challenges that growth brings.

Following on from the introductory hui from the previous financial year, the NEC spent two days in June 2021 working with Alannah Marriott to review where we are as an organisation and in our Te Tiriti journey. This reflection and review highlighted that CDANZ continues to have a long way to go on this transformational journey of becoming a Te Tiriti organisation.

From this work we have established a Te Tiriti o Waitangi group on Exec to prioritise key areas to progress for 2022/2023 and in the longer term.

It is with humble gratitude that we acknowledge the mahi and time invested by the Maori & Pacific Career Practitioners Rōpū with successive NEC's to support CDANZ on this journey.

***He maurea kai whiria!***

***Ignore small matters and direct effort toward important projects***

### MEMBERSHIP SURVEY 2021

In 2021 CDANZ working with Nelson Marlborough Institute of Technology (NMIT) asked you to complete a survey which we would use to support our advocacy in a number of spaces but particularly to further the advocacy for post graduate study options and micro-credentials in career development. I would like to thank CDANZ Fellow Sam Young for her work on developing the survey which used some questions from a survey CDANZ did in 2013 so that we could compare data on the survey and also the Data Analysis. Stats NZ has a wonderful tool which they allow people to use, and Sam has developed a CDANZ 100 village infographic so we can see a snapshot of CDANZ in 2021 when the survey was carried out. It sits alongside the STATS NZ 100 village infographic so you can compare.



## MEMBERSHIP REPORT

The heralding of Matariki marks the coming of a new year - a time to take stock and reflect upon the year that has passed, and to prepare and plan for the year ahead. It is also a time to remember our loved ones who have passed during the year

Denise Raymond is the Membership Lead on the NEC.

As we look back on 2021 – 2022, we can see it has been a year of big changes for CDANZ membership with the introduction of the new Entry Level Qualifications (ELQ) and Membership Pathways (MP) and the implementation of the Competency framework model.

The Membership Committee and Evaluators Team have been tasked with ushering in and actioning these changes. There are always complexities and challenges when implementing a new system and the Membership Committee and the Evaluators Team have been working collaboratively to refine processes and procedures to support membership applications.

To date there have been 14 membership applications received and evaluated under the new system. Of these, 12 were approved, one declined and there is one application pending evaluation.

Of the 12 approvals, five are Professional and seven are Full Members, four of which have been granted Provisional status. Five members have come through via Alternative Pathways.

***Nau mau, haere mai to all our new members – welcome to CDANZ.***

### **Current Membership**

Currently we have a total of 480 members compared to 532 at the same time last year.

**Membership Numbers as at 8 June 2022.**

Membership	Total
Full	67
Affiliate	120
Student	32
Professional	230
Fellow	11
Professional ON HOLD	10
Life	5
Full ON HOLD	2
Full (Provisional)	2
Professional (Provisional)	1
<b>TOTAL:</b>	<b>480</b>

**Membership Numbers as at 8 June 2021**

Membership	Total
Full	81
Affiliate	147
Student	41
Professional	247
Fellow	11
Professional ON HOLD	*
Life	5
Full ON HOLD	*
Full (Provisional)	0
Professional (Provisional)	0
<b>TOTAL:</b>	<b>532</b>

\*Data not available in early stages of transition to the CRM

The decline in overall membership numbers over this period is mainly due to retirements, relocations, career redirection, illness, and other changes in personal circumstances.

Affiliates make up the largest percentage of those retiring their membership in 2022 with 27 members leaving. There is a high turnover of staff in some of the organisations where Affiliates work.

Some of the cohort of Full and Student members in 2021 have upgraded to Professional and Full membership in 2022, which accounts for some of the decline in those numbers.

### ***To all those leaving - Haere rā, haere pai***

A recent excerpt from one of the many messages we received from retiring members:

*I want to convey my thanks to the association for the support I have received, and accommodations made on compassionate grounds in view of my personal circumstances. This has been a wonderful gift for which I am very grateful.*

*I pass on to the association my very best wishes as you seek to encourage and support career development professionals who are playing such vital role in helping people find their place in the world and grow in their careers*

We also acknowledge and thank the Membership Committee led by Denise Raymond and her team Debbie Thomas and Christine Manson, who volunteer many hours of their time to meet monthly via Zoom to review applications for Full, Professional and Fellow membership, in addition to auditing Professional Development returns.

Special thanks to our new National Membership Administrator Julie Pope for her fantastic work in assisting our members, the Membership Committee and Evaluators Team.

We are currently seeking expressions of interest from Full and Professional members who are interested in joining the Membership Committee. It is an opportunity to step up to a senior role within CDANZ to serve the membership and contribute your skills and experience to our organization. (For all enquires please contact The National Membership Administrator).

Having reflected upon all that has been achieved over the past year, we now look forward to working on refining processes and implementing policies to lead a thriving association and membership into the future.

Ongoing engagement, consultation and collaboration with our members and allied stakeholders, will be integral to leading a sustainable future for us all.

### ***We Succeed Together - Ki te kāpuia e kore e whati***

## ENTRY LEVEL QUALIFICATIONS AND MEMBER PATHWAYS EVALUATION TEAM

In 2021, Robyn Bailey and Dale Furbish were appointed Co-Leads of the Evaluation Team. They are joined by Chris Bridgman, Catherine McIntyre, Jo Protzman and Wendy Holden as Evaluators, we would like to acknowledge and thank them for their valuable work and contribution to professionalism.

Over the course of the last year the evaluation team working closely with Juile Pope and Membership Lead Denise Raymond have continued to develop and refine the process required for membership after the 2021 new Membership structure was introduced. This has been an enormous task and has involved continued refinements as we work through the different applications and circumstances of members. Thank you to you all for your continued diligence and also feedback and adjustments as we streamline these processes for the benefit of the whole association. Robyn, who was part of the original Professionalism Project team, stepped down as Co-Lead for the Evaluation Team earlier this year. Dale has now taken the helm. We are grateful to all the Evaluators for their commitment to this important work.

## ACKNOWLEDGING ROBYN BAILEY



Robyn Bailey has stepped down as co-lead in March 2022. The NEC would like to acknowledge the work that Robyn has done in this space. Robyn, with Amanda Smit, presented the original research around the development of the Entry Level Qualifications and Member Pathways working alongside the professional team and the NEC. She was an instrumental part of the consultation and the development of the final remits that went to the membership vote in March 2021 before being adopted. Robyn led the design, development and training, supported by Dale Furbish, of the Evaluation teams documents and process. When Robyn first presented the initial research, I am sure she never envisioned the long and winding road to development and implementation and I think the whole association owes Robyn much gratitude for stepping down only after she knew it was up and running. Thank you Robyn, we are very lucky to have had your knowledge and time over the last four years.

## BRANCHES

Associations General Manager Kris Anderson has taken over as Branch Liaison. This year we have seen the continuation of a very strong desire by the National Executive Committee to engage with our members through their respective branches. This consultation process has been reflected in regular branch leaders' meetings designed to not only give feedback on essential membership information but also discuss a variety of items impacting members or their needs.

As part of this process, the NEC has been actively monitoring levels of branch activity and the stability of the regional branch committees. While most branches have been actively promoting local events designed to serve their members' needs, we have seen some areas where this has not been as successful. Also, of concern, we have seen some branches finding stable leadership difficult to obtain.

While the NEC has actively worked with those experiencing these issues it has become apparent that these issues are not isolated and are actually representative of a broader succession problem for branches.

With inconsistency in the regional branch structure shown within the events and leadership structure, the NEC has responded and actively undertaken a review of the current branch structures and the leadership roles needed to operate them. During this process, the NEC representatives involved in this area of work have actively sort feedback and comments from all branches both through regular meetings and one on one meetings throughout the year.

A consistent piece of feedback that has been received through this process is how difficult it is to operate the current constitutional requirements that are set down within CDANZ and that perhaps another model could be designed to better serve our current members' needs. This feedback has also been received in regard to the need for some branches to operate regular local member events.

With this feedback primarily in mind, all NEC conversations on possible restructuring of the current branch makeup have been designed to not only make the day-to-day running of local events and reporting requirements easier for those involved in local leadership but also add benefits to all CDANZ members.

## CUSTOMER RELATIONSHIP MANAGEMENT (CRM) and WEBSITE

Robyn Cannell was the associations Lead during the implementation of this project. Kris Anderson has now taken over the management and troubleshooting role in consultation/support with Julie Pope the Membership administrator. Much work has been done on the CRM project since our last AGM. Here are some key points of interest:

- The “go live” date for July 2021 was held up with some matters around banking
- 20 August 2021 was the “go live” day
- The system was synchronised with our accounting package, Xero, on 1 September 2021
- Zoom orientation sessions were held for members on 6th and 9th September 2021
- A video recording of those training sessions was made available on the website
- The first newsletter was sent out from the CRM on 2nd September 2021

Due to the uniqueness of CDANZ’s processes some issues have arisen. Cyberglobe have provided great support - meetings with them have been worthwhile and productive. Initially weekly meetings were held with Cyberglobe’s Radha Cumaresan. These provided valuable information and support as issues were identified. These issues, however, have been small in the scheme of things. Overall, the process has worked well, and members are now successfully updating their memberships online.

A tremendous amount of back work, and enthusiastic support for the implementation of this system must be acknowledged. Our thanks go to Lauren Hughes and Koa Saxby, but also to Kris Anderson our new GM and Julie Pope our new Membership Administrator who have taken over the meetings and running of the system and are currently refining processes. And also thank you to the many National Executive Committee members who have actively championed for a new CRM over time. Without their dedication and accumulated knowledge, we would not have this new CRM. We continue to look at ways of streamlining current systems, providing greater operational efficiencies and improved data and reporting so we can better understand our membership and its needs.

# PROFESSIONALISM

## PROFESSIONAL DEVELOPMENT

During 2021 Yvonne Gaut was Professional Development Lead supported by Lauen Hughes. In February 2022 Hana Lambert the association Treasurer and Serena Tiaiti took over as Co-leads of Professional Development supported by Kris Anderson the associations General Manager

Your CDANZ professional development team has enjoyed delivering

### **April 2021 Hybrid Career X event in Auckland**

CDANZ was proud to collaborate with our international peers in Canada, Australia, the UK and South Africa by bringing you the first two webinars (from the professional development series of five webinars), to stimulate debate about our profession and our role as career development practitioners in a post-Covid world. We recommend you go online and watch both webinars at the links below.

### **International Think Tank Webinar Series #1 Professionalising Career Development: History, Identity, CPD and Training**

**Link:** [International Think Tank Webinar #1: Professionalising Career Development](#)

This webinar looked at the history of career development offering insight into its present status and ongoing challenges related to professionalisation. Against this background, six complementary steps to professionalisation and how these can influence the construction and reconstruction of how we define ourselves and our profession provided reflective food for thought.

### **November 2021, International Think Tank Webinar Series #2 Career Theory**

**Link:** [International Think Tank Webinar #2: Career Theory](#)

The second webinar in the International Think Tank series focussed on Career theory as a foundation for our field by offering a broad range of perspectives on career development.

The

webinar featured three short presentations designed to stimulate discussion and reflection on career theory, its relationship to practice, and its applications in settings outside its origins.

### **New Zealand Occupational Rehabilitation Conference (NZORC) 2021**

Due to the ongoing risk of COVID-19, NEC made the difficult decision to move from a kanohi-ki-te-kanohi/live event to a fully virtual event for our 2021 NZORC conference. Again, 68 of our wonderful members showed up virtually and participated in our conference. We also thank ACC for sponsoring this event.

A big thanks go to Lauren Hughes and our wider CDANZ team for making this day happen!

Topics covered included:

- **Motivation, hope and a better story for your clients**
- **ACC and Kaupapa Māori services**
- **A Te Tiriti based approach**
- **What we can learn from Tupu Aotearoa, Pacific**
- **Employment Advisory Services**
- **Individual Placement and Support (IPS) evidence-based practices in employment support in a New Zealand context**
- **ACC Back To Work Service & response to CDANZ member survey**
- **The importance of the language of inclusion**
- **Using whakataukī cards to inspire career conversations**
- **Vocational Rehabilitation & legal implications Sam Hack**

Our first webinar in our **2022 Culture and Diversity Series Rainbow 101** was presented by **Jessie Lewthwaite, she/her**, Inclusion Manager for Rainbow at Auckland University of Technology. Jessie set the bar high presenting practical, down to earth knowledge about what Rainbow is, what it all means, and how to respectfully and confidently interact with a rainbow person of any identity.

There were a number of other webinars for members to access through CDANZ, and the PD team has enjoyed bringing these professional development opportunities to you. Including the **Youth Employability Aotearoa 2021** presented by **Shirley Johnson**

**Thank you to our Auckland and Otago branches for organising and sharing their Professional Development with other branches virtually.**

## **2022**

This year we have again focussed on virtual Professional Development again due to uncertainties around Covid-19 and the spread of Omicron especially as we approach winter. Following on from our Rainbow 101 webinar in our Culture and Diversity series, we have had two additional webinars from Peter Upulu, Brown Tale: The Power of the Collective and Professor Edwina Pio, A World Between Worlds.

We have several other events coming up during the year and look forward to sharing these with you over the coming months.

## **ADVOCACY**

CDANZ National Executive Committee has maintained an active presence advocating for quality career development in a number of key areas with TEC, MOE, ACC, MSD and MBIE, Te Pūkenga, RSLG. We are actively involved with a number of government projects.

## TERTIARY EDUCATION COMMISSION (TEC) - NATIONAL CAREER SYSTEMS STRATEGY (NCSS)

Heather Lowery-Kappes Association President looks after this area of Advocacy. Having spent 2020-2021 lobbying TEC and other government ministries to create a National Strategy for Careers and Employability, which encompasses all of Aotearoa, the NEC are very proud to have finally had the December 2021 announcement below

<https://www.tec.govt.nz/news-and-consultations/new-report-highlights-the-success-of-the-direct-career-service/>

*"Throughout 2022, TEC will be working closely with CDANZ and the sector to develop a national careers system strategy. The goal of this strategy will be to ensure everyone in Aotearoa New Zealand can access quality, professional careers information and advice, so they have the tools they need for a rewarding work and learning journey."*

As this report goes out to you, we have had two meetings of the National Career Systems Strategy Advisory Panel. We are agreed on the current state and the issues that affect it from being all it could be and have begun to imagine what we hope the future state could be. I am optimistic that there is an appetite for a collaborative approach that increases equity and better development resources. Soon I hope to be able to come out to you with more information and ways to feedback. I would like to thank Robyn Cannell, Cherie Perrow and Jennie Miller for supporting me to be the voice of CDANZ and its Members in the room.

## MOU PARTNERSHIPS

CDANZ continues to strengthen and refresh our MOU partnerships. While over the past year this has been by ZOOM and Microsoft Teams, we feel that many of these relationships are maturing well and can see continued and lasting benefits for our CDANZ members

Our current MOU partners include:

- CDAA – Career Development Association of Australia – access all CDAA events as at CDAA membership prices
- CATE- Career and Transition in Education in Aotearoa NZ
- ICF – International Coaching Federation
- NZATD – New Zealand Association of Training and Development
- NZDSN – New Zealand Disability Support Network, Supported Employment
- NZWRI – New Zealand Work Research Institute

- Diversity Works – Full access to all webinar events free of charge for CDANZ members

Other key partnerships include

- UCENZ- University Careers and Employability New Zealand
- RCSA - Recruitment, Consulting and Staffing Association Australia & New Zealand
- YEA – Youth Employability Aotearoa
- MYOB
- WORKBRIDGE
- NZAC – National Counselling Association of NZ
- CCANZ - Combined Counselling Associations of NZ
- INTERNATIONAL PEAK BODY PEAK BODIES – Free International Think Tank webinar series
- APCDA - Asia Pacific Career Development Association
- WILNZ- Work Integrated Learning NZ

## CDAA

The CDANZ National President and the CDAA National President have a standing catch up and we regularly benefit as an association with shared PD and access to resources, research and knowledge. In May 2022, I was fortunate enough to be able to attend the CDAA conference in Sydney as a standing complimentary agreement. At the conference, I was excited to be able to announce that in 2023 CDANZ will host a joint CDANZ/CDAA international Career Conference something we have been quietly working towards for some years.



Left to right: Past CDAA President - Wanda Hayes CDANZ President - Heather Lowery-Kappes , CDAA President - Lyndia Jefferies and CDAA National Manager - Peter Mansfield at 2022 CDAA conference dinner in Sydney

## ASIA PACIFIC CAREER DEVELOPMENT ASSOCIATION (APCDA)

Robyn Cannell has been the Country Director for the last two years.

Robyn's report:

APCDA Country Directors meet for one hour by zoom once every three months. At these meetings, each country presents a brief report on career development trends happening in their country. This year meetings have seen a strong focus on the changes and challenges brought about by the COVID pandemic. It has been heartening to hear how each country has managed to continue providing professional career development by webinar and continue with their day-to-day work. APCDA provide scholarships for various research projects and a lot of free professional development events. Belonging to this association is a great way to network globally. The website: <https://apcda.wildapricot.org> explains more about professional development opportunities.

APCDA's vision statement is *"APCDA is a forum for sharing career development ideas and practices in the Asia Pacific region and engaging the world about these*

*insights”.*

It has been a pleasure to represent CDANZ as New Zealand Country Director.

## VOCATIONAL REHABILITATION PORTFOLIO

With the Vocational Rehabilitation Portfolio, Paula Rewi and Paul Fennessy have continued to engage with ACC and the CDANZ membership via MS Teams, ZOOM, phone and our Facebook page. The CDANZ Vocational Practitioners Facebook page continues to be a valuable platform for keeping members updated with ACC newsletters, professional development opportunities, information and advice. The Facebook page currently has 82 members, which is an increase on last year.

The past year has been full of change as we have continued to navigate our way through the effects of Covid-19 on our lives, our whanau, our clients, the way we work, and the economy. We have also seen a reduction in referral volume across both the Occupational Assessment and Back to Work Services and have been delivering more of our services via Telehealth. ACC continue to address their staffing issues and are looking at innovative ways to increase referrals and deliver vocational rehabilitation services.



Although we were unable to deliver the 2021 New Zealand Occupational Rehabilitation Conference in person, we were pleased with the smooth transition to an online event, and the fantastic feedback received from those who attended. We would like to thank those who included in their feedback recommendations for specific professional development and speakers for future events. This information has been provided to the Professional Development Team who are busy booking webinars and events for us.

As Paula Rewi continues her journey on new projects, the VRS Portfolio will now be led by Paul Fennessy. Paul brings a wealth of knowledge and experience to the role of VRS Portfolio Lead; having both management and consultancy experience in IOA/VIOA and BTW contracts, and existing relationships with ACC. Paul can be reached at paulfennessy.cdanz@gmail.com.

## EDUCATION

Cherie Perrow is the Associations Vice President and Education Advocacy Lead. CDANZ continued working with the Tertiary Education Commission (TEC) on Inspiring the Future throughout 2021. Inspiring the Future was launched in New Zealand schools in May 2021. During COVID-19 Alert levels 3 and 4, Inspiring the Future provided an online version for schools to continue running events. The online events were shorter and enabled schools to invite role models from anywhere in the country. Inspiring the Future has over 500 role models live on their platform. To date TEC have over 100 schools engaged in this programme. The programme's success will be based on students' exposure to diverse role models. Currently, the TEC are not seeking any further support or consultation from CDANZ.

CDANZ has been working with TEC and CATE on the feedback received from the CDANZ Gateway washup survey. This survey was also sent out to CATE members in Auckland, Northland and Waikato. Despite CDANZ advocating for the washup to be revoked, TEC were not granted any discretion to either mitigate, or not apply, any existing funding recovery methodologies for 2021. CDANZ will continue to work with CATE and TEC to ensure the future sustainability and effective delivery of the Gateway programme.

CDANZ has worked with the Ministry of Education (MOE) and CATE on Careers education in the schooling system. CDANZ was able to provide MOE with some valuable insights that will feed into their policy work on careers education. Key themes in the korero included equity and equality in the provision of careers education across the schooling system, the careers advisor role, professional development and potential career development micro-credentials, career education and curriculum, and more direct connection between school and employment.

CDANZ is working with Youth Employability Aotearoa in a partnership agreement and in an advisory capacity. An MOU will be organised between YEA and CDANZ whereby CDANZ will be involved in two main projects.

## TEC - DIRECT CAREER GUIDANCE SERVICE

Heather Lowery-Kappes, Association President looks after this area of advocacy. While CDANZ members contracting to this service are directly contracted to TEC and MSD Heather has remained as trouble-shooter in this area and has been able to support the service delivery understanding of career development Practice and the funding applications. “Such was the success of the Direct Career Service that the service, originally planned to be delivered until June 2021, has now been extended for another year, to June 2022.”

“The report makes for very positive reading. It shows the value the Direct Career Service has delivered during a time of immense uncertainty and stress, and the role that career development professionals played in ensuring New Zealanders felt supported and confident in their career journey,” says Tim Fowler, Chief Executive of the TEC.

“I want to acknowledge our partnership with CDANZ, without whom the Direct Career Service would not have been possible. As we process the learnings from this report, we look forward to working with CDANZ and others in the sector to develop a robust careers system strategy for Aotearoa New Zealand.”

Report <https://www.tec.govt.nz/assets/Reports/TEC-Insights-Report-Oct-2021>.

What we know is that MSD will be funding the service moving forward. However, how that will look at this stage is unknown. Congratulations to all the people who have contracted to TEC/MSD for this work - your dedication and excellence has meant that the service will continue and CDANZ will as much as we can continue to support and advocate for you as there are a large number of our members employed to work in this service.

## TEC – ONLINE CAREER PLANNING SOLUTION - TAHATŪ

Throughout 2021 CDANZ president Heather Lowery-Kappes had fortnightly meetings with the Tahatū project lead to consult on career development aspects of the build. Moving into the build phase of the project Heather now sits on the Industry Panel with a number of other CDANZ members, past CDANZ president Val O'Reilly, Lynette Reid, Leigh Gray

Below is a video link and also the latest update from the project -

<https://youtu.be/xZBY5dzvW2I>

## FINANCIAL REPORT

Hana Lambert is the Association Treasurer presenting her fourth annual financial report to CDANZ. The finalised accounts for the year ended 31 March 2022 are attached for members' review. To recap, at the previous AGM, we forecast a projected loss of around \$28,000 for the 2022 financial year.

The last financial year has continued to be impacted by COVID-19. We were fortunate to find a small window of opportunity to host a well-attended kanohi-ki-te kanohi/live CareerX event in April 2021. Due to uncertainty around event restrictions and changes in COVID alert levels, we made the tough decision to move our NZORC conference from a live event in September to a virtual event. We are grateful to our members for supporting the change and for their attendance at this event.

On reflection, there were three positive outcomes by hosting NZORC online:

1. We were able to reduce the ticket prices to members making the event more affordable. It also meant that our members didn't incur significant travel costs to access the PD.
2. As the event was hosted virtually, we saved significantly on the venue cost (projected venue hire was \$13,000), and on travel and accommodation costs for speakers and organisers.
3. The virtual event provided CDANZ with an opportunity to host a truly sustainable, carbon zero event.

We know that the whakawhanaungatanga and networking that occurs at a live event are priceless. We korero, connect with new colleagues and reconnect with old friends and find ways to collaborate. The richness of sharing best practice in person enables us, as Career Development Professionals, to refuel, reconnect and reenergise us for our mahi, our clients and our professional practice. However, increased affordability, accessibility and sustainability are good reasons for our association to continue this mix of virtual and live events moving forward.

Our contractor services expenses were slightly lower owing to the retirement of Koa Saxby (which she delayed to ensure the implementation of the new CRM) and Lauren Hughes, who has moved on to pursue her career in Art Therapy and Arts in the Community. These two wonderful women have been the repository of organisational knowledge and at the helm of the engine room of CDANZ for many years and we are now moving through a transition period with our new team.

Julie Pope has taken over the contract role of Membership Coordinator and Kris Anderson has been employed as our full time General Manager. For a short period of time there was an overlap with Koa and Julie both working together. As indicated at last year's AGM, we proposed the appointment of a full-time General Manager, and the appointment of a Membership Coordinator, and this appointment in October saw an increase in expenses due to wages, PAYE and Kiwisaver.

The first stage of CRM integration and implementation resulted in increased time by our contractors and Kris (Membership Coordinator, National Development Manager and Admin Bookkeeping) working through the cycle of implementation. There have been some integration issues which have taken considerable time to work through with Cybergglue the developer (as is expected with any new system change and integration process). Thankfully, the development and maintenance costs to date were built into our CRM purchase and license, although any new development changes to the CRM will be charged from 1 July 2022. Our team (Kris Anderson and Julie Pope) have now taken over the ongoing maintenance of the CRM system reducing long term costs and expenditure.

Outstanding debtors are higher than last year, and a number of these have been due to integration issues with the CRM and Xero. We are continuing to resolve this with Cybergglue and with the thorough work of Julie Pope and Katarina Kuziel, our bookkeeper.

Budget was set aside for Māori design, imagery and content on the website, but this expenditure has been moved as a key priority to the 2023 financial year. With the complexity and transition of the CRM and migration of the website, the decision was made to have the CRM system and infrastructure in place before proceeding with new elements of design. It has also meant that internally we now have the experience and capability to work with the developer (Cybergglue) and future visual/graphic designers to make the changes. More importantly, with this infrastructure in place alongside the development of our Te Tiriti o Waitangi project group, we can now focus on bringing in a kaihoahoa (designer) and kaitohutohu (cultural advisor) to guide us through this important mahi.

The Treasurer and General Manager attended the AuSAE conference in February in Rotorua. This was a professional development opportunity to build on the knowledge, skills and professional networks to develop in their roles as an association executive member and as an incoming manager. A direct benefit from the networking and ongoing relationship building by Kris, has been the resultant signing of the Memorandum of Understanding

(MOU) between Diversity Works and CDANZ, which has opened up a strong partnership and a range of professional development opportunities that will be available to our members.

A sincere thank you goes to all our branches for their work in managing branch finances and for having your financial reports completed in time for branch AGM's.

Despite forecasting a project loss of \$28,000 at the last AGM, with cautious management of our finances and increased income we ended the year in a prudent financial position. The society made a net loss of \$13,220 on total revenue of \$129,106 for the financial year ended 2022.

On the following pages please find the Compilation Report for our financial year ending 31 Mar 2022, as prepared by our accountants, Fairground Accounting. An adjusted Budget for the 31 March 2023 year will be presented by the Treasurer at the AGM.



# Annual Report

Career Development Association of New Zealand  
For the year ended 31 March 2022

Prepared by Fairground Ltd



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# Compilation Report

## Career Development Association of New Zealand For the year ended 31 March 2022

Compilation Report to the members of Career Development Association of New Zealand.

### Scope

On the basis of information provided and in accordance with Service Engagement Standard 2 Compilation of Financial Information, we have compiled the financial statements of Career Development Association of New Zealand for the year ended 31 March 2022.

These statements have been prepared in accordance with the accounting policies described in the Notes to these financial statements.

### Responsibilities

The Society's Officers are solely responsible for the information contained in the financial statements and have determined that the Special Purpose Reporting Framework used is appropriate to meet your needs and for the purpose that the financial statements were prepared.

The financial statements were prepared exclusively for your benefit. We do not accept responsibility to any other person for the contents of the financial statements.

### No Audit or Review Engagement Undertaken

Our procedures use accounting expertise to undertake the compilation of the financial statements from information you provided. Our procedures do not include verification or validation procedures. No audit or review engagement has been performed and accordingly no assurance is expressed.

### Independence

We have no involvement with Career Development Association of New Zealand other than for the preparation of financial statements and management reports and offering advice based on the financial information provided.

### Disclaimer

We have compiled these financial statements based on information provided which has not been subject to an audit or review engagement. Accordingly, we do not accept any responsibility for the reliability, accuracy or completeness of the compiled financial information contained in the financial statements. Nor do we accept any liability of any kind whatsoever, including liability by reason of negligence, to any person for losses incurred as a result of placing reliance on these financial statements.

Fairground Ltd

Dated: 16 June 2022



# Directory

## Career Development Association of New Zealand For the year ended 31 March 2022

### **Nature of Business**

Association for members working in Career Development industry

### **Incorporation Number**

856958

### **Date of Incorporation**

5th June 1997

### **Registered Office**

PO Box 31104, Ilam, Christchurch, 8444

### **IRD Number**

83-763-914

### **Office**

Heather Lowery-Kappes - President  
Cherie Perrow - Vice President  
Hana Lambert - Treasurer  
Paula Stenberg - Secretary (stepped down July 2021)  
Jennie Miller - Immediate Past President  
Denise Raymond  
Robyn Cannell  
Paula Rewi  
Serena Tiaiti  
Yvonne Gaut (stepped down January 2022)

### **Chartered Accountant**

Fairground Ltd

### **Bankers**

Kiwibank



# Approval of Financial Report

## Career Development Association of New Zealand For the year ended 31 March 2022

The Office Holders are pleased to present the approved financial report including the historical financial statements of Career Development Association of New Zealand for year ended 31 March 2022.

APPROVED

For and on behalf of the Members.

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Heather Lowery-Kappes - President

Date .....

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Hana Lambert - Treasurer

Date .....



# Statement of Profit or Loss

## Career Development Association of New Zealand For the year ended 31 March 2022

	2022	2021
<b>Trading Income</b>		
Administration Fee	1,763	6,721
Membership Revenue	92,742	88,933
Ticket Sales	17,735	-
Ticket Sales for Voc Rehab specific events	13,459	-
<b>Total Trading Income</b>	<b>125,699</b>	<b>95,655</b>
<b>Gross Profit</b>	<b>125,699</b>	<b>95,655</b>
<b>Other Income</b>		
Interest Income	357	493
Other Revenue	50	17,768
Event Sponsorship	3,000	-
<b>Total Other Income</b>	<b>3,407</b>	<b>18,260</b>
<b>Total Income</b>	<b>129,106</b>	<b>113,915</b>
<b>Expenses</b>		
<b>Operating Expenses</b>		
Accounting & Audit Fees	3,396	4,336
Administration Assistant	24,733	20,401
Advocacy Project	1,966	3,431
Bank Fees	173	179
Bookkeeping and Administration	2,257	1,317
Capitation	4,835	4,203
Collateral - Promotional, Marketing, Branding	14	812
CRM Expenses	6,300	3,690
Membership Evaluators & Co-Lead Evaluators payments	1,525	-
Depreciation	3,938	3,089
Event and PD General expenses	108	-
Insurance	1,778	1,953
IRD - Interest Expense	-	-
Legal Expenses	-	1,200
Loss on Disposal of Fixed Asset	173	-
Membership Benefits & Acknowledgements	169	5,800
Merchant fees	763	20
ND Manager Contract	17,310	30,218
ND Manager Sundry	210	240
Office Expenses	837	170
Professional Memberships & Subscriptions	604	605
Professionalism Project	-	2,324
Research Development Grants	-	870
Shipping & Postage	36	24

These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



	2022	2021
Stripe Fees	498	-
Te Tiriti o Waitangi partnership project	5,651	600
ND Manager Travel	840	361
Web & Computer Maintenance	1,751	1,941
Webinar Subscriptions	1,784	1,374
Event Ticketing Expense	882	15
Wages	34,615	-
Recruitment - Contractors or employee	569	-
Kiwisaver Employer Contribution	1,038	-
<b>Total Operating Expenses</b>	<b>118,754</b>	<b>89,172</b>
<b>AGM / PD Expenses</b>		
Event & PD related Airfares (PD)	985	(591)
Event & Conference Catering & venue (PD)	7,538	-
Gifts Farewell & Acknowledgement	917	249
Guest speakers (PD)	1,683	46
Taxis & Transport for PD Events only	-	35
Professional Development - National Executive PD	435	946
<b>Total AGM / PD Expenses</b>	<b>11,559</b>	<b>685</b>
<b>Exec Committee Expenses</b>		
Exec meeting Accommodation (Exec)	2,310	3,438
Exec meeting Airfares	3,749	4,351
Exec meeting Catering, Food & Venue	1,808	2,978
Mileage (Exec)	558	1,207
PD for National Exec Airfares & Related Travel	-	1,172
Taxi/Uber & Parking (Exec)	461	396
<b>Total Exec Committee Expenses</b>	<b>8,886</b>	<b>13,541</b>
<b>President's Expenses</b>		
Honorarium (President)	1,650	1,650
<b>Total President's Expenses</b>	<b>1,650</b>	<b>1,650</b>
<b>Total Expenses</b>	<b>140,849</b>	<b>105,048</b>
<b>Profit (Loss) Before Taxation</b>	<b>(11,743)</b>	<b>8,867</b>
<b>Taxation and Adjustments</b>		
<b>Non-Deductible Expenses</b>		
IRD Penalties	25	-
<b>Total Non-Deductible Expenses</b>	<b>25</b>	<b>-</b>
Income Tax Expense	1,415	735
<b>Total Taxation and Adjustments</b>	<b>1,440</b>	<b>735</b>

These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



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20222021

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**Activities from CDANZ Branches**

Net Surplus from CDANZ Branches	(37)	1,299
<b>Total Activities from CDANZ Branches</b>	<b>(37)</b>	<b>1,299</b>
<hr/>		
<b>Net Profit (Loss) for the Year</b>	<b>(13,220)</b>	<b>9,431</b>

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These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



# Balance Sheet

## Career Development Association of New Zealand As at 31 March 2022

31 MAR 2022

31 MAR 2021

### Assets

#### Current Assets

##### Cash and Bank

##### Bank Balances - CDANZ Branches

Cash on Hand - Auckland	4,945	4,530
Cash on Hand - Bay of Plenty	1,227	1,747
Cash on Hand - Canterbury	2,001	2,100
Cash on Hand - Hawkes Bay	1,324	1,271
Cash on Hand - Manawatu	2,741	3,124
Cash on Hand - Marlborough	2,332	2,143
Cash on Hand - Northland	1,887	1,766
Cash on Hand - Otago	2,515	2,458
Cash on Hand - Taranaki	590	722
Cash on Hand - Waikato	1,176	1,285
Cash on Hand - Wellington	1,392	1,019
<b>Total Bank Balances - CDANZ Branches</b>	<b>22,128</b>	<b>22,165</b>

Clearing Account	359	9,569
Kiwibank Business Edge 01	27,692	62,416
Kiwibank Business OnCall 02	98,638	98,282
Kiwibank Cheque Account 00	4,684	5,745
<b>Total Cash and Bank</b>	<b>153,502</b>	<b>198,177</b>

Trade and Other Receivables	20,741	13,011
Income Tax Receivable	280	-
<b>Total Current Assets</b>	<b>174,523</b>	<b>211,187</b>

#### Non-Current Assets

Property, Plant and Equipment	4,732	7,256
<b>Total Non-Current Assets</b>	<b>4,732</b>	<b>7,256</b>

<b>Total Assets</b>	<b>179,255</b>	<b>218,443</b>
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### Liabilities

#### Current Liabilities

Trade and Other Payables	6,464	34,014
GST Payable	6,968	6,341
Income Tax Payable	-	735
Employee Entitlements	1,689	-
<b>Total Current Liabilities</b>	<b>15,121</b>	<b>41,090</b>

<b>Total Liabilities</b>	<b>15,121</b>	<b>41,090</b>
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<b>Net Assets</b>	<b>164,133</b>	<b>177,353</b>
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These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



31 MAR 2022

31 MAR 2021

**Equity**

Retained Earnings	164,133	177,353
<b>Total Equity</b>	<b>164,133</b>	<b>177,353</b>

These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



# Statement of Changes in Equity

## Career Development Association of New Zealand For the year ended 31 March 2022

	2022	2021
<b>Equity/Members Funds</b>		
Opening Balance	177,353	167,922
<b>Increases</b>		
Income for the Period	(13,220)	9,431
<b>Total Increases</b>	<b>(13,220)</b>	<b>9,431</b>
<b>Total Equity/Members Funds</b>	<b>164,133</b>	<b>177,353</b>

These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



# Depreciation Schedule

## Career Development Association of New Zealand For the year ended 31 March 2022

NAME	PURCHASED	DISPOSED	COST	OPENING VALUE	PURCHASES	SALE PRICE	LOSS	RATE	DISPOSALS	CLOSING ACCUM DEP	DEPRECIATION	CLOSING VALUE
<b>Hardware Assets</b>												
HP Pavilion Laptop & Monitor	1 Oct 2021		1,587	-	1,587	-	-	50.00%	-	397	397	1,190
Total Hardware Assets			1,587	-	1,587	-	-		-	397	397	1,190
<b>Software Asset</b>												
MemberConnex Professional Edition Software	4 Sep 2020		10,000	7,083	-	-	-	50.00%	-	6,458	3,542	3,542
Total Software Asset			10,000	7,083	-	-	-		-	6,458	3,542	3,542
<b>Website</b>												
Website	1 Aug 2008	1 Apr 2021	3,660	-	-	-	-	60.00%	-	-	-	-
Website	1 Jul 2009	1 Apr 2021	3,600	-	-	-	-	60.00%	-	-	-	-
Website	28 Feb 2013	1 Apr 2021	1,050	4	-	-	4	50.00%	4	-	-	-
Website	30 Oct 2013	1 Apr 2021	1,250	7	-	-	7	50.00%	7	-	-	-
Website	4 Mar 2014	1 Apr 2021	650	5	-	-	5	50.00%	5	-	-	-
Website Addition	10 Jul 2014	1 Apr 2021	750	7	-	-	7	50.00%	7	-	-	-
Website Addition	30 Nov 2015	1 Apr 2021	1,265	31	-	-	31	50.00%	31	-	-	-
Website Additions	27 Feb 2017	1 Apr 2021	1,110	64	-	-	64	50.00%	64	-	-	-
Blog on Website	29 Nov 2017	1 Apr 2021	550	54	-	-	54	50.00%	54	-	-	-
Total Website			13,885	173	-	-	173		173	-	-	-
Total			25,472	7,256	1,587	-	173		173	6,855	3,938	4,732

These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



# Notes to the Financial Statements

## Career Development Association of New Zealand For the year ended 31 March 2022

### 1. Reporting Entity

Career Development Association of New Zealand is a Society incorporated on 5th June 1997, and subject to the Incorporated Societies Act 1908.

This special purpose financial report was authorised for issue in accordance with a resolution of Office Holders dated 7 June 2022.

### 2. Statement of Accounting Policies

#### Basis of Preparation

These financial statements have been prepared in accordance with the Special Purpose Framework for use by For-Profit Entities (SPFR for FPEs) published by Chartered Accountants Australia and New Zealand.

The financial statements have been prepared for taxation purposes.

#### Historical Cost

These financial statements have been prepared on a historical cost basis. The financial statements are presented in New Zealand dollars (NZ\$) and all values are rounded to the nearest NZ\$, except when otherwise indicated.

#### Changes in Accounting Policies

There have been no changes in accounting policies. Policies have been applied on a consistent basis with those of the previous reporting period.

#### Income Tax

Income tax is accounted for using the taxes payable method. The income tax expense in profit or loss represents the estimated current obligation payable to Inland Revenue in respect of each reporting period after adjusting for any variances between estimated and actual income tax payable in the prior reporting period.

#### Goods and Services Tax

All amounts are stated exclusive of goods and services tax (GST) except for accounts payable and accounts receivable which are stated inclusive of GST.

#### Revenue Recognition

Revenue is measured at the fair value of the consideration received or receivable for the sale of goods and services, to the extent it is probable that the economic benefits will flow to the institute and revenue can be reliably measured. Membership revenue and event revenue is recognised in full when invoiced or received (whichever occurs first) (i.e. accrual accounting is not applied). Merchandise sales are recognised when the goods are dispatched. Interest received is recognised as interest accrues, gross of refundable tax credits received.

#### Accounts Receivable

Accounts receivables are recognised initially at fair value and subsequently measured at amortised cost using the effective interest method, less an allowance for any uncollectible amounts. Individual debts that are known to be uncollectable are written off in the period that they are identified.



### Fixed Assets and Depreciation

Property, plant and equipment are stated at historical cost less any accumulated depreciation and impairment losses. Historical cost includes expenditure directly attributable to the acquisition of assets, and includes the cost of replacements that are eligible for capitalisation when these are incurred. Depreciation is calculated on a straight line/diminishing value basis over the estimated useful life of the asset using depreciation rates published by Inland Revenue. Assets estimated useful life is reassessed annually. The following estimated depreciation rates/useful lives have been used:

Website. 50% - 60% Diminishing Value

An item of property, plant and equipment or investment property is derecognised upon disposal or when no further future economic benefits are expected from its use or disposal. Any gain or loss arising on derecognition of the asset (calculated as the difference between the net disposal proceeds and the carrying amount of the asset) is included in profit or loss in the year the asset is derecognised.

### Financial instruments - financial liabilities

Financial liabilities, including borrowings and bank overdrafts, are initially measured at fair value net of transaction costs and are subsequently measured at amortised cost using the effective interest method. Interest expenses are recognised in profit or loss on an effective yield basis

	2022	2021
<b>3. Property, Plant and Equipment</b>		
<b>Other Fixed Assets</b>		
Fixed assets	(6,458)	(2,917)
Owned fixed assets	10,000	23,885
Accumulated depreciation - fixed assets owned	-	(13,712)
<b>Total Other Fixed Assets</b>	<b>3,542</b>	<b>7,256</b>
<b>Total Property, Plant and Equipment</b>	<b>3,542</b>	<b>7,256</b>
	2022	2021

### 4. Income Tax Expense

Net Income Before Tax	(11,804)	10,166
<b>Additions to Taxable Profit</b>		
IRD Penalties	25	-
Loss from Member Activities	16,729	-
<b>Total Additions to Taxable Profit</b>	<b>16,753</b>	<b>-</b>
<b>Deductions from Taxable Profit</b>		
Income tax credit for non-profit bodies	1,000	1,000
Losses Brought Forward	5,056	-
Profit from Member Activities	-	1,485
<b>Total Deductions from Taxable Profit</b>	<b>6,056</b>	<b>2,485</b>
Taxable Profit (Loss)	(1,107)	7,681
Tax Payable at 28%	-	2,151
<b>Opening Balance of Income Tax Payable (Refund Due)</b>		
Opening balance	2,151	(221)
<b>Total Opening Balance of Income Tax Payable (Refund Due)</b>	<b>2,151</b>	<b>(221)</b>



	2022	2021
<b>Deductions from Tax Payable</b>		
2021 tax paid	2,431	-
<b>Total Deductions from Tax Payable</b>	<b>2,431</b>	<b>-</b>
<b>Additions to Tax Payable</b>		
Amounts Refunded from IRD	-	221
<b>Total Additions to Tax Payable</b>	<b>-</b>	<b>221</b>
Income Tax Payable (Refund Due)	(280)	2,151
	<b>2022</b>	<b>2021</b>

## 5. Related Parties - Reimbursements made to Executive Committee

<b>Reimbursements made to Executive Committee</b>		
Denise Raymond	1,265	370
Jennie Miller	-	239
Hana Lambert	61	52
Heather Lowery-Kappes	187	744
Paula Rewi	281	-
Robyn Cannell	95	-
Yvonne Gaut	72	146
Cherie Perrow	780	-
<b>Total Reimbursements made to Executive Committee</b>	<b>2,741</b>	<b>1,552</b>
<b>Honorarium Paid</b>		
President	1,650	1,650
<b>Total Honorarium Paid</b>	<b>1,650</b>	<b>1,650</b>
<b>Total Related Parties - Reimbursements made to Executive Committee</b>	<b>4,391</b>	<b>3,202</b>