

CHAIRPERSON'S REPORT

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Adult Literacy Rural Trust

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Executive Summary

RESULTS

Student numbers increased by 160% in 2016. The goal was 200%. This was an aggressive goal and, although it was not met, the increase the Adult Literacy Rural Trust did achieve is a good result. In 2017, working together with Beef & Lamb NZ and the Primary ITO, extending our connections with other similar rural organisations and continuing our work with community organisations, there is a very good chance that setting the goal of 200% increase in student numbers would be realistic and achievable.

Enquiries came in response to a variety of marketing tools. Although all tools resulted in enquiries, making calls to community organisations stood out as the most effective method of increasing enquiries. The Adult Literacy Rural Trust (ALRT) will focus on increasing its capacity to make marketing calls in 2017.

FUNDING

The budget figures reflect expenditure necessary to provide the service effectively. It is not a utopian budget but an aggressive one, which reflects the funding level needed. Consequently, despite the Trust being better resourced than in previous years, it was necessary that budgeted expenditure in 2016 was reduced when there was not enough funding available for a specific purpose.



ADMINISTRATION

With greater resources in 2016, the Adult Literacy Rural Trust was able to work more effectively than in the past. Despite the funding issues mentioned above, the Trust came the closest it has ever come to having key roles filled. This is reflected in the increased student numbers.

Prior to 2016, without funding for the Community Coordinator, and with the Student Liaison Coordinator only working 10 hours per week, there was no-one to delegate tasks to and the Manager, additional to her own work, was trying to do what is now being done by the two coordinators in the 30 hours a week extra we now have – the Trust was too under-resourced to function efficiently.

In 2016, our team of volunteers expanded even further. The Trust has a large team of very competent administration volunteers as well as our core of volunteer coaches. We have a volunteer IT administrator, a social media volunteer, several data entry volunteers building our marketing database, two grantwriting volunteers, a coach and student mentor, a graphic artist, a report writing mentor and two website builders. We are currently advertising for a volunteer call centre team leader, and call centre operators. Without these dedicated volunteers, the Trust could not provide its services.

REVIEW OF ACTIVITIES 2016

SUMMARY

Project	Objective Achieved
Income (cf forecast) Income (cf budget)	Objective partially achieved. Actual income for 2016 was \$70,433.66, which was 86% of the Forecast income of \$81,565 and 38% of the 2016 Budget figure of \$186,199. ¹
Expenditure (cf income) Expenditure (cf Forecast) Expenditure (cf budget)	Objectives achieved. Spending has not exceeded income. Expenditure of \$116,990 ² was 91% of the Forecast expenditure of \$129,116.33 and 63% of the 2016 Budget expenditure of \$186,199; See Funding/Expenditure. ¹
Student Recruitment	
Student Tuition	All students interviewed were matched with a volunteer coach.
Student Retention	80% retention is a very good result with this client group.
Coach Training	Milestones all met
Marketing	
Community	Objectives achieved. See Student Recruitment/Publicity
Workplace	Objectives not achieved. See Student Recruitment/Publicity
Follow-up phone calls recollaboration/literacy hubs	Objectives not achieved. See Student Recruitment/Publicity
Website	Milestone at the end of August – should have been online in draft form by then. Is currently at a standstill but a plan is in place to address this. See Student Recruitment/Publicity
Radio	Advertising in four areas completed. 3/11 applications successful, covering 4 areas.
Income-earning training	It took longer than expected to get a reliable team of volunteers to help build the database for this.

¹ The budget figures reflect expenditure necessary to provide the service effectively. It is not a utopian budget but one which reflects the funding level needed. The forecast figures indicate what income we can be 70% certain of receiving, based on past funding.

² Expenses of \$119,421 – depreciation of \$2434 = \$116,990 because depreciation was not included in the forecast.

STUDENT RECRUITMENT



STUDENT NUMBERS

Student numbers have more than doubled during 2016, with the greatest increase in enquiries following a decision to make follow-up calls (to promotional materials sent by mail) to community organisations, in particular schools and churches, where we wanted to establish literacy hubs.

Having established that, although labour intensive for a small organisation with already stretched staff, making contact by phone has a positive impact on the number of enquiries we receive, a plan was made, to seek help with making phone calls.

Enquiries dropped off after we delegated the phoning to NZMA, a call centre training programme. (See Publicity/Marketing Letters to New Database.) Consequently, the Adult Literacy Rural Trust (ALRT) has started advertising for volunteers to form a small call centre specifically for the Trust.

PUBLICITY

The Adult Literacy Rural Trust used a range of methods (listed below) to gain publicity in 2016.

Learning lessons from our 2016 experiences, described below, in 2017 the onus will be on continuing to build the database and using phone calls as the primary method of contacting people on the database to inform them about our service, followed up by email or by sending First Contact Cards, as appropriate.

The website itself does attract a reasonable number of enquiries and is also regarded as a necessary adjunct to any other form of marketing as it is a place to refer people.

The greatest risk to effective publicity in 2017 is inability to find people to make phone calls or to start a call centre.



SERVICE PROVISION

Service provision is the area in which the Adult Literacy Rural Trust shines. The Trust's systems are good and procedures have been fine-tuned to work with distant students.

FUNDING

GRANT APPLICATIONS

In 2016, a total of 55 applications were made and 18 were successful, making the success rate 33%. This is a very good result and the Board would like to thank the funders who supported the work of the Trust. A list of funders is scrolled across the bottom of the Adult Literacy Rural Trust website.

In 2016, we had two volunteers helping to write grant applications for the first time. In 2017, we will advertise for new people to fill those roles as both those volunteers moved on to other employment.

Using volunteers to write grant applications was initially quite challenging until procedures and systems were developed.

BEQUEST

The bequest programme has started with bequest flyers being sent to retirement villages from Northland down to Otago. There is no apparent way to follow up with phone calls in this case. In 2017 Senior Net, Age Concern, University of the Third Age, Grey Power and other organisations where a speaker might be required would be a good next step.

INCOME EARNING & TRAINING

Developing a social enterprise seems to be the most significant way that other organisations are creating income with a view to sustainability. Discussion with Sandy Thompson (Senior Lecturer in Unitec's Graduate Diploma in Not for Profit Management) about using training courses as a way of creating income indicates that it would be worth talking to Community Waikato field advisors about capacity building and also to their Social Enterprise Team, which helps non-profits to develop a social enterprise. Sandy also commented that having a product to sell is both easier and more successful than selling a service.



EXPENDITURE

Expenditure	YTD Budget <i>(needed for optimal performance - ALRT goal)</i>
Jan	\$15,517
Feb	\$31,034
March	\$46,551
April	\$62,068
May	\$77,585
June	\$93,102
July	\$108,619
August	\$124,136
September	\$139,653
October	\$155,170
November	\$170,687
December	\$186,204

TRUSTEES



Chairperson
Richard Winch



Vice - Chairperson
Vijay Satyanand



Secretary
Jo Poland



Treasurer
Barry O'Donnell