

Annual Report 2025

for 1 April 2024 – 31 March 2025 Financial Year

The Human Factors and Ergonomics Society of New Zealand is the membership body for human factors/ergonomics professionals in New Zealand. HFESNZ has functioned since 1986, after splitting from the Ergonomics Society of Australia and New Zealand established in 1966. Thus, we have had a NZ society for this professional group for 56 years.

The society objectives are to promote the application of human factors/ergonomics knowledge; and advance human factors/ergonomics research, education, public awareness, and professional standards.

HFESNZ is a federated member of the International Ergonomics Association.

Chairperson's Report

HFESNZ Chairman's Annual Report 2025

Kia ora koutou, talofa lava,

As we gather for the 2025 Annual General Meeting, I am immensely proud to reflect on a year of remarkable achievements, resilience, and collaboration for the HFESNZ.

The past 12 months have been marked by significant milestones, challenges, and a steadfast commitment to advancing human factors and ergonomics (HFE) across Aotearoa. This report highlights our key activities, successes, and the collective efforts of our members, committee, PAB, and partners over the 2024/5 period.

Key Achievements in 2024-2025

Workforce Development Programme (WDP)

The successful completion of the Workforce Development Programme (WDP) in 2024 was a cornerstone achievement. In 2024/25 a final allocation of \$31,413.88 from HASANZ was made to complete WDP activities and spark new initiatives. For example, the development of the Brilliant Basics course designed to address gaps in Level 2 HFE education. It being developed by Paul Bowie and will be delivered in NZ with the aim of attracting new learners and building society membership. The funds also helped to support the Human Factors in the Land Transport System short course led by Mackie Research & Consulting. These initiatives have strengthened our educational offerings, fostered greater awareness of HFE in industry and academia. It is hoped that these initiatives will lead to more memberships for HFESNZ. My gratitude goes to our WDP workstream leads of Fiona Trevelyan, Dave Moore, Liz Ashby, Hamish Mackie, Rebecca Luther, Vanessa Beanland, Dan Nathan-Roberts, and Stephen Legg for their tireless efforts in driving these outcomes, along with the earlier efforts of the wider WDP team.

Conferences, Webinars, and Events

Our events this past year showcased the depth and diversity of HFE expertise within our society. Many of our members also presented and supported local and international conferences:

- **IEA Triennial Congress (South Korea, August 2024):** Our strong presence at the International Ergonomics Association (IEA) Congress in Jeju saw HFESNZ members Fiona Trevelyan, Chris Polaczuk, Dan Nathan-Roberts, Alaska White, and me deliver impactful presentations. Notably, Fiona and Liz Ashby received the IEA Tsinghua Award for their work on Collaborative HFE Education, and I was honoured with the IEA Kingfar Award for early-career HFE contributions to research. Chris (Co-Chair Construction Technical Sub-Committee), Fiona (member of Healthcare Technical Sub-Committee) and myself (IEA Council member and Co-Chair of Certifications Sub-Committee) also took on significant IEA roles, further enhancing HFESNZ's role and reputation on the global stage.
- **HFESNZ 1-Day Conference (September 2024):** Held in Wellington with the theme of "Collaboration and Connection," this event brought together 28 delegates for 10 inspiring presentations on diverse topics ranging from musculoskeletal disorders (MSDs) to fatigue and injury prevention. The conference fostered new networks, particularly among students, and highlighted the value of HFE research through engaging activities like the crowd favorite 'Te Reo bingo' and workshops. A special thanks to Joanne Crawford and Nic Green helping plan and run this event.
- **INCOSE-HFESNZ Joint Webinar (November 2024):** In a collaborative effort between HFESNZ and the INCOSE NZ chapter, a webinar titled "HSI/HFI in the Systems Lifecycle" was held in back in November 2024. The session featured Grace Kennedy from INCOSE, who presented an engaging introduction to Human Systems Integration (HSI), illustrated with examples across the systems engineering lifecycle. The talk also touched on INCOSE's HSI goals and initiatives, emphasizing the importance of integrating human factors and systems engineering at both international and national levels. Coordinated by Nick Pickering (Chair of INCOSE NZ) and myself, the event marked a meaningful step in cross-disciplinary collaboration and knowledge exchange between the two professional communities.
- **Human Factors in the Land Transport System Short Course (May 2025):** Led by Hamish Mackie and hosted by Auckland Transport, the sold-out short course held on 28 May 2025 demonstrated the practical application of HFE principles in transport system design. Supported by Mackie Research, the AT Human-Centred Design Team, and HFESNZ members Clare George, Maggie Trotter, Amy Williamson, Dave Moore, and Rebecca Luther along with and Irene Tse (AT) the event was well-received and has sparked interest in future collaborations and society-endorsed models.
- **New Zealand Occupational Hygiene Society (NZOHS) Work-Related Health Confereee (May 2025):** Hosted at the Hilton Auckland, was a key event under the theme "Challenges, Change, Solutions." HFESNZ members, including myself, presented and had a stall at this collaborative event, engaging with occupational hygienists on shared workplace health and safety goals. Feedback was positive, the conference fostered networking, knowledge exchange, and discussions on integrating HFE and occupational hygiene to address musculoskeletal disorders and workplace hazards. Thanks to NZOHS for their hospitality and our members for their contributions, paving the way for future collaborations between the two associations.

- **HASANZ Conference (September 2024):** HFESNZ members shone at the HASANZ Conference in Wellington, with presentations from Joanne Crawford, Margaret Van Schaik, Chris Polaczuk, and me. Despite lower attendance compared to previous years, the event underscored our commitment to collaboration and competence in health and safety. My thanks to Joanne for representing HFESNZ in the HASANZ governance group.
- **HFESA Webinar – Slips, Trips & Falls (June 2025):** HFESNZ members were invited to a free webinar hosted by HFESA (Australia) titled “A New Look at Slips, Trips & Falls: A Systems Approach to a Stubborn Risk”. Presented by Canadian expert Heather Kale, the session explored why STFs persist despite training and signage, and how systems thinking can uncover deeper causes. The webinar featured real-world case studies and Safety II-informed perspectives.
- **Healthcare Symposium and HFESNZ Conference (October 2025):** The upcoming Healthcare Symposium and HFESNZ Conference in Christchurch promise to be landmark events, featuring Professor Paul Bowie, a renowned Patient Safety Scientist and HFE specialist. The symposium, driven by Fiona Trevelyan and supported by Karen Goodfellow, Jo, Nic, Maggie, and Carl, will showcase HFE in healthcare, while the conference, with abstracts finalized by Joanne, Hamish, and Dwain, will offer a robust program. Thanks to co-conveners Nicola, Leanne, and Rachel for their outstanding efforts.

Educational Advancements

The establishment of the HFE Postgraduate Course at AUT, celebrated at the HFE Expo and Launch in May 2024, marked a significant step in equipping the next generation of HFE professionals. This program, alongside guest lectures by members like Joanne Crawford, Fiona Trevelyan, Liz Ashby, and Nic Green, has strengthened the link between academia and practice. The Occupational Ergonomics course (RHAB801) at AUT continues to attract interest, further embedding HFE in higher education.

Professional Affairs Board (PAB) and Membership Growth

The PAB, led by Leanne Hunter, has been instrumental in enhancing our membership framework. Key developments include:

- **New Membership Categories:** The introduction of "Early HFE Career" and "Fellow" categories, approved unanimously at the April 2024 Special General Meeting, has broadened access to professional recognition.
- **Continuing Professional Development (CPD):** The new annual CPD requirement for all Professional Members, effective from April 2025, ensures ongoing professional growth. The PAB is finalising an updated online CPD recording system to streamline this process.
- **HASANZ Register:** We've encouraged Certified Professional Members to join the HASANZ Register, with plans to explore eligibility for Associate and Technical Members, enhancing professional visibility and credibility.

Advocacy and Collaboration

As mentioned above, HFESNZ has strengthened ties with allied organisations, including INCOSE, the Institute of Organisational Psychology, and the New Zealand Occupational Hygiene Society (NZOH). Our

collaboration with WorkSafe's HFE team, despite restructuring challenges, resulted in valuable resources like the manual tasks screening and risk assessment tools, led by Marion Edwin, Leanne Hunter, and Cory Matulino. We also supported H&S education through meetings with HASANZ and education providers, advocating for HFE's role in workplace safety.

Challenges

2024 was not without difficulties. Organizational restructures and redundancies impacted many members, particularly those within Government agencies. On behalf of HFESNZ, I extend heartfelt thanks to Marion Edwin, Leanne Hunter, and Cory Matulino for their extraordinary contributions to HFE at the regulatory level. We stand with all members affected by these changes. Several senior HFESNZ members, me included, offered support through job opportunity sharing and advocacy letters especially for our members undergoing stressful restructure negotiations. Thank you all for writing these letters of support for your fellow colleagues. While it didn't have the desired outcome for some (our thoughts are with you), it still demonstrates our strength and unity as a society.

Despite these challenges, our community's warmth and solidarity, evident at the Wellington conference, remind us that no member stands alone. We are always here to help.

What's ahead for 2025–2026?

As I step down as Chair at this AGM, I am confident that HFESNZ is in excellent hands with our incoming leadership. Our priorities for the coming year include:

- Delivering a successful multi-day conference in Christchurch in October 2025.
- Expanding public and disciplinary awareness of HFE through collaborations with HASANZ, NZOH, and other organizations.
- Nurturing our growing student cohort and continuing to support early-career professionals.
- Leveraging WDP successes to develop sustainable revenue streams through symposiums, sponsorships, and short courses.
- Continuing to refine PAB processes to ensure a robust, inclusive membership framework.

Acknowledgements

This year's successes are a testament to the dedication of our committee, PAB, and members. I extend my deepest gratitude to all my fellow committee members, PAB team, HASANZ representatives, mentors and supporters; academic staff members and owners of HFE-related businesses in Aotearoa. Many of you have more than carried your load for HFESNZ – you know who you are. It's not easy being a volunteer but I am so grateful and proud that hung in there for our team, and our discipline.

Several key and influential figures are stepping down from society duties after AGM this year. Thank you for your service, Vanessa Beanland, Fiona Trevelyan, Hamish Mackie, Karen Goodfellow, Rachael Gordon, and Tahlia Fisher. On behalf of the society, we thank you for your commitment these last few years, and we wish you well for future endeavours. Thank you, Carole Unkovich, Dan Nathan-Roberts, Leanne Hunter, Nic

Green, and Sarita Dara for your amazing work too.

Goodbye

Finally, this is my last Annual Report as Chair. Serving as HFESNZ Chair has been an honour and a privilege. I am deeply grateful for the opportunity to lead this vibrant community and for the support and camaraderie of our members. As I transition to my roles as New Zealand's IEA Council Member and Chair of the IEA Certification Sub-Committee, I remain committed to representing HFESNZ on the global stage. I extend my apologies for any unintentional oversights during my tenure (I'm still terrible at formulating notions!) and thank you all for your support during my tenure. Most importantly, thanks to my wife Gloria and small army of children (Alaane, Nathaniel, Oliver, Keanan, and baby Sinamay) for allowing me the time to give this position my all. I couldn't have done this without you.

I am thrilled to pass the baton to our incoming Chair, a highly respected leader who will continue to champion HFE in Aotearoa. I encourage all members to attend the AGM to meet her, embrace her, and to continue supporting one another as we shape the future of HFESNZ.

Fa'afetai i le alofa ma le lagolago i la'u ta'ita'iga. Ia manuia.

Ngā mihi nui,

Dr Stephen Kolose | HFESNZ Chairperson

HASANZ Report (Joanne Crawford and Hamish Mackie)

Over the previous year Joanne Crawford took over from Hamish Mackie as the HFESNZ representative on the HASANZ Governance Group. The Health and Safety Association of NZ is the umbrella organization representing workplace health and safety in New Zealand. For the second half of 2024, HASANZ business as it relates to HFESNZ, focused on the following areas:

- Completing the workforce development projects (as described above). Although there is much more to be done, already there is evidence of how these initiatives are sparking an interest in HFE and creating educational pathways. It's now important that HFESNZ, related organisations who are consumers of HFE, and educational institutions, 'hold the baton' building on the WFD projects funded by worksafe/HASANZ.
- Continued growth in the HASANZ register, following simplification of registration procedures. For HFESNZ certified members, joining the HASANZ register is a good way to enhance your individual profile in the health and safety domain, but also to support the profile of HFE and its contribution to H&S.
- Adoption of a new constitution, in part to comply with new rules under the Incorporated Societies Act 2022.
- Continued engagement with the other professional bodies of the HASANZ Governance Group.
 - Invited representation for HFESNZ on the HASANZ Education Forum.

- The HASANZ AGM in Wellington highlighted the high levels of work that HASANZ have achieved and going forward this includes supporting the Education Forum and the HASANZ Business Brand.
- There is a continued focus on financial stability amongst government reforms but further stability with the funding of HASANZ through ACC. HFESNZ will continue to engage with HASANZ to identify strategic opportunities
- While our current government announcements to bring a level of uncertainty, there are continued engagements with both Minister Van Velden and WorkSafe NZ through HASANZ.
- HFESNZ was well represented at the 2024 HASANZ Conference. Planning has started for the 2026 conference and HFESNZ will be represented on the conference planning committee.

Joanne Crawford and Hamish Mackie – August 2025

Professional Affairs Board Report (Leanne Hunter)

Membership numbers

Over the last year the professional member levels have declined very slightly. Unfortunately, the numbers of applications have also been minimal. This has been slightly disappointing given the amount of effort the PAB have made into updating the application system. The lack of new professional members may be attributed to the current economic climate and the recent significant upheaval in the public sector.

The table below shows the membership numbers for the 2024/25 financial year compared to previous years.

Membership category	31 March 2025	31 March 2024	31 March 2023	31 March 2022	31 March 2021	31 March 2020	31 March 2019
Certified Member	16	16	17	16	14	14	14
Associate Member	6	6	6	8	6	7	4
Technical Member	3	3	3	2	1	1	1
General Member	64	65	68	74	63	65	57
General Member (Life)*	10	10	10	10	10	7	11
Student Member	14	6	6	6	7	6	3
Total	113	106	110	116	101	100	90

The PAB team

The PAB consists of four members from a range of backgrounds and experience. The team have worked hard to finalise the new professional membership application process and updates to how CPD is recorded which from 1 April 2025 includes the requirement for Associate and Technical members to submit suitable CPD records.

The PAB continue to finalise the updated Continuing Professional Development (CPD) process with the first records due for submission on 31.03.26. Work is needed to update the website so that new professional members can apply online and to update how CPD is recorded. Progress on all of these aspects has also been delayed due to the need to update the HFESNZ Constitution which has affected the part of the application process.

Our team has consisted of:

- Leanne Hunter (Convenor)
- Rachael Gordon
- Nicola Green
- Sarita Dara

The PAB term for Leanne and Rachael have come to an end which means we need to fill two vacant rolls. Preferably you will be a Certified Member, but Associate and Technical Members can also apply. Due to a lack of volunteers, the PAB have approached HFESNZ Committee to temporarily extend the term Leanne and Rachael can serve, up to a maximum of 1 year. The purpose of this is to finalise the application process and CPD changes. If you are interested in serving on the PAB Committee then please get in touch with Leanne as soon as possible at: profmember@hfesnz.org.nz.

Activities

Professional member assessments and membership enquiries

The PAB held three professional membership assessment meetings during the 2024/25 financial year. Outcomes of these assessments include:

- 0 applications for Professional Members
- 3 recertifications for Certified Professional Members.

PAB goals for 1 April 2025 – 31 March 2026

Once the new HFESNZ Constitution has been voted in the PAB will finalise the new application and CPD processes. We will update members about the changes at the 2-day HFESNZ Conference on 2-3 October 2025.

The main aim for the 2025/26 financial year is to increase the number of Professional Members. This is important to develop HFE capability and growth within New Zealand. We also need new Professional Members to become involved in PAB to replacing outgoing members.

A huge thanks you to all members of the PAB, looking forward to working with you all again over the next year.

Leanne Hunter, 25 July 2025

Draft Minutes – 2024 Annual General Meeting on 27 June 2024 at 2pm

Steve Kolose discussed 2024 AGM minutes and received apologies from Treasurer and members. They also discussed amending membership criteria for students to include part-time students. An SGM will be conducted to finalize the motion. Attendees will be added to the minutes after the meeting.

- Steve discussed the meeting agenda and technical issues at the beginning of the meeting. They confirmed that they could hear each other and that the technical issues were resolved. They discussed the financial review and decided not to carry out a review unless a member requests it.
- Steve, Fiona, and Sue discussed the agenda for the upcoming AGM. They also talked about the delay in the pipeline work and the possibility of having the AGM online. Fiona shared that she will be starting a new job on the 8th.
- Steve, Fiona and Sue discussed the following topics in the meeting.
- Steve chaired the meeting and discussed various topics.

Steve, Hamish, David, Vanessa Beanland and Nicola discussed the financial report and possible remuneration for committee and PAB members. The society earned a total revenue of \$45,737 and incurred a total expense of \$43,790.

- Steve presented the financial report for the year 2024, which showed an increase in revenue and assets compared to the previous year. The surplus for the year was \$2947, and the net assets of the society were \$56,541.
- Hamish and Steve discussed the inconsistencies in how remuneration is applied across the society in terms of tasks and activities. They suggested ways to address this issue, such as conference fees, subsidies for the conference team involved, or even subsidized yearly memory subscription for PAB members.
- Vanessa Beanland, Hamish, David, Nicola and Steve discussed the issue of honorariums for society activities.
- Dan, David, Marion and Steve discussed the allocation of funds for educational student assistance grants and the possibility of holding two years of running costs in reserve. They also discussed the idea of offering free subscriptions to individuals with significant leadership responsibilities.
- Leanne and Steve discussed potential ideas for the conference committee.

Steve, Fiona and Marion discussed the issue of workload and fatigue in relation to the society's activities. They acknowledged the hard work of those involved and discussed potential **solutions** such as a credit system for CPD and attracting new members to share the load.

- Marion and Fiona discussed the challenges of doing ends related work and the need for recompense. They suggested a credit system for things like ends, conference, and membership. Fiona suggested looking at how other organizations manage this issue.
- Steve, Holly and Fiona discussed the importance of sharing responsibilities and getting different faces into roles to help. Leanne shamelessly plugged for certified members to do a stint on PAB. Steve mentioned the nominations for committee and PAB, which included Vanessa Matakatea.
- Steve and Holly discussed Holly's interest in joining the committee. Holly expressed her willingness to join the team, and Steve thanked her for speaking up. Vanessa Matakatea was nominated for the committee, and her nomination was moved and seconded by Karl and Fiona respectively.

Steve expressed gratitude to the committee members for their hard work and acknowledged the contributions of Karl Bridges, who is stepping down from both committee and PAB. Fiona offered to take on an educational role for the society.

Hamish, Marion and Fiona discussed the Workforce Development project for tranche one and two. They achieved a lot in tranche two despite it being a sprint. They continued to have HFESNZ and HIS ends scholarships being awarded annually and they have been increasing in number each year.

- Hamish provided an update on the Workforce Development project for tranche one and two. He mentioned that tranche two was meant to be a one-year project but ended up being a six-month sprint. Despite this, they achieved a lot.
- Hamish discussed the progress of the HFE program and suggested that more work is needed to promote it across other organizations. He praised Liz for her proactive approach in promoting the program and mentioned the success of the Expo runner AUT event.
- Marion and Hamish discussed the future of HFESNZ and the need for committee leadership. Marion thanked the team for their hard work and progress made in the last six months.
- Steve and Fiona discussed the progress of the Workforce development program. Fiona emphasized the importance of strengthening the team's LinkedIn profile and filling the program lead role. They are working hard to show that this is a resource that needs to be met by AU tea in.

Steve, Marion, Karl, Vanessa Beanland and Vanessa Matakatea discussed 2024 HFESNZ annual general meeting. They discussed the treasurer position and Karl nominated Dan for the position. They also discussed the need for a secretary and chair elect. The group also discussed upcoming events, including a one-day conference and a healthcare special interest group webinar.

- Steve, Leanne and Fiona discussed the upcoming one-day conference and the need for a conference team. Fiona mentioned a scheduled healthcare special interest group webinar on August 6th with Paul Bowie.

- Marion, Steve and Vanessa Matakatea discussed the importance of work-related health issues. Vanessa shared her experience as a judge for the safeguard awards and highlighted the lack of nominations in the work-related health category.
- Steve and Vanessa Beanland discussed the process of formally accepting the nomination for Karl to be Treasurer. They mentioned that there is a form which needs to be filled out and signed by the nominator and seconder.
- Steve and Karl discussed the nomination of a new treasurer and the process of transferring the Society bank accounts. They thanked Carol and Karen for their hard work and contributions to the Society. No other orders of business were discussed.
- Steve, HFESNZ and Dan declared the 2024 HFESNZ annual general meeting closed. The attendees thanked each other and wished each other a good weekend. Dan was welcomed aboard and was sent a nomination form to complete.

Meeting closed: 2:55pm

Treasurer's report – Financial year ending 31 March 2025

This report comes from reviewing the document Performance Report – HFESNZ compiled by Natasja Joubert at NJCA Limited, Chartered Accountant. Based on information provided and in accordance with Service Engagement

Standard 2 Compilation of Financial Information, NCJA compiled the financial statements of Human Factors and Ergonomics Society of New Zealand for the year ended 31 March 2025.

The report acknowledged the purpose of the Society is:

- a) To promote the application of human factors/ergonomics knowledge.
- b) To advance human factors/ergonomics research, education, public awareness and professional standards.
- c) To perform any functions or actions necessary or helpful to fulfil the above purposes.

And that the HFESNZ's Reliance on Volunteers and Donated Goods or Services

- 90% reliance on volunteers
- No goods donated
- Services include range of advisory services focusing on society development, industry updates.

Based on the financial statements provided, here is a summary:

Revenue:

- Total Revenue: \$33,856 (down from \$45,737 in 2024)

- Membership fees and subscriptions: \$15,684
- Revenue from goods/services (e.g., conferences): \$15,772
- Other Revenue: \$2,400

Expenses:

- Total Expenses: \$37,251 (down from \$42,790 in 2024)
 - Costs related to goods/services: \$16,996
 - Other expenses (e.g., administration): \$20,255

Surplus/Deficit:

- Deficit for the year: \$(3,395) (compared to a surplus of \$2,947 in 2024)

Assets and Liabilities:

- Total Assets: \$54,454 (down from \$56,663 in 2024)
- Total Liabilities: \$1,307 (up from \$122 in 2024)
- Net Assets: \$53,146 (down from \$56,541 in 2024)

Cash Flow:

- Net decrease in cash: \$(1,323)
- Closing cash balance: \$53,411

Membership:

- Total members: 113 (up from 101 in 2024)
 - Breakdown: General (64), Associate (6), Professional (16), Student (13), Technical (3), Life (11)

Key Notes:

- No commitments, contingent liabilities, or related party transactions.
- The entity remains exempt from income tax and plans to continue operating in the foreseeable future.

This summary highlights the Society's stable financial position, slight membership growth, and reliance on funding sources like HASANZ and membership fees.

On that basis, I move for the treasurer's report to be accepted.

Financial Statements

Human Factors and Ergonomics Society of New Zealand
For the year ended 31 March 2025

Prepared by Coast CA Limited

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Compilation Report

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

Compilation Report to the Directors of Human Factors and Ergonomics Society 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 Human Factors and Ergonomics Society of New Zealand for the year ended 31 March 2025.

These statements have been prepared in accordance with the accounting policies described in the Statement of Accounting Policies.

Responsibilities

The Trustees are solely responsible for the information contained in this financial report and have determined that the accounting policies used are 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 Human Factors and Ergonomics Society 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 this financial report.



Jasja Joubert (Jul 3, 2025 21:05 GMT+12)

Coast CA Limited

Hokitika

Dated: 3 July 2025

Entity Information

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

'Who are we?', 'Why do we exist?'

Legal Name of Entity

Human Factors and Ergonomics Society of New Zealand

Entity Type and Legal Basis

Human Factors and Ergonomics Society of New Zealand is an Incorporated Society registered under the Incorporated Societies Act 1908.

Registration Number

NZBN: 9429042684695

Incorporation Number: 441832

Date of Incorporation: 22 August 1988

Entity's Purpose or Mission

The purpose of the Society:

- (a) To promote the application of human factors/ergonomics knowledge.
- (b) To advance human factors/ ergonomics research, education, public awareness and professional standards.
- (c) To perform any functions or actions necessary or helpful to fulfil the above purposes.

Entity Structure

The Society shall have an elected committee ("the Committee"), comprising of the following:

- (a) Chairperson;
- (b) Secretary;
- (c) Treasurer;
- (d) And 2 committee members.

Main Sources of Entity's Cash and Resources

Membership fees and conferences (although conference is every second year).

Main Methods Used by Entity to Raise Funds

- Membership fees and conference
- We run webinars, however these are either additional charges to attendees or included in membership fees.

Entity's Reliance on Volunteers and Donated Goods or Services

- 90% reliance on volunteers
- No goods donated

- Services include range of advisory services focusing on society development, industry updates.

Registered Office Address

HASANZ, Suite 6, 108 The Terrace, Wellington Central, Wellington, 6011, NZ.

Approval of Financial Report

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

The Committee are pleased to present the approved financial report including the historical financial statements of Human Factors and Ergonomics Society of New Zealand for year ended 31 March 2025.

APPROVED



Stephen Kolose
Chair Person

Date Jul 8, 2025



Dan Nathan-Roberts (Jul 9, 2025 00:07 PDT)

Dan Nathan-Roberts
Treasurer

Date Jul 9, 2025

Statement of Service Performance

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

'What did we do?', 'When did we do it?'

Human Factors & Ergonomics Society of NZ is a membership society which was established for the benefit of its members to be a supportive group with New Zealand.
The Society has its members based all over New Zealand.
The Administrators is based in Rolleston, Canterbury.
The Committee are also based all over NZ and conduct their committee meetings virtual on Microsoft Teams.

Description of Entity's Outcomes

The Human Factors and Ergonomics Society of New Zealand:

- Promotes the application of human/ factors/ ergonomics knowledge
- Advances human factors/ ergonomics research, education, public awareness and professional standards.

Society Outcomes are:

- Increasing membership (including continuous improvement of member benefits)
- Raise awareness of HFE
- Develop the industry within NZ

Description and Quantification of the Entity's Outputs

- Final progress on the HASANZ/WorkSafe NZ funded Workforce Development Project. This project has now been completed.
- 5 committee meetings held from April 2024 to March 2025
- 4 newsletters during April 2024 to March 2025 <https://hfesnz.org.nz/newsletter/>
- Special interest groups – 1 webinars held via Microsoft Teams with up to 25-40 attendees

Additional Output Measures

Membership has increased slightly from 101 to 113 due to increased student members from the previous year.

	2025
Membership subscriptions for 2024/2025	
General members	64
Associate members	6
Professional members	16
Student members	13
Technical members	3
Life members	11
Total Membership subscriptions for 2024/2025	113

Statement of Financial Performance

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

'How was it funded?' and 'What did it cost?'

	NOTES	2025	2024
Revenue			
Membership fees and subscriptions			
Membership fees		15,619	16,332
Prof Membership Application Fees		65	-
Total Membership fees and subscriptions		15,684	16,332
Revenue from providing goods or services			
Conference/Seminar Income		120	27,805
HASANZ Funding Received		15,652	-
Total Revenue from providing goods or services		15,772	27,805
Other revenue			
Other Revenue		2,400	1,600
Total Other revenue		2,400	1,600
Total Revenue		33,856	45,737
Expenses			
Costs related to providing goods or service			
Advertising / Promotion / HASANZ		593	1,000
Bad Debts Written Off		662	-
Bank Fees		76	187
CIEHF Annual Licence Fee		1,039	-
Conference/Seminar expenses		5,473	23,160
HASANZ Representation		1,000	2,000
IEA Dues		-	551
IEA Representation		586	-
Postage		-	30
Subscriptions		7,569	4,891
Total Costs related to providing goods or service		16,996	31,819
Other expenses			
Administration		19,505	10,336
Consulting & Accounting		750	635
Total Other expenses		20,255	10,971
Total Expenses		37,251	42,790
Surplus/(Deficit) for the Year		(3,395)	2,947

This statement has been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.

Statement of Financial Position

Human Factors and Ergonomics Society of New Zealand
As at 31 March 2025

'What the entity owns?' and 'What the entity owes?'

	NOTES	31 MAR 2025	31 MAR 2024
Assets			
Current Assets			
Cash and short-term deposits			
HFESNZ 00		53,411	54,734
Total Cash and short-term deposits		53,411	54,734
Accounts Receivables		420	644
Goods and services tax		623	1,285
Total Current Assets		54,454	56,663
Total Assets		54,454	56,663
Liabilities			
Current Liabilities			
Creditors and accrued expenses		1,307	122
Total Current Liabilities		1,307	122
Total Liabilities		1,307	122
Total Assets less Total Liabilities (Net Assets)		53,146	56,541
Accumulated Funds			
Accumulated surpluses (or deficits)		53,146	56,541
Total Accumulated Funds		53,146	56,541

This statement has been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.

Statement of Cash Flows

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

	2025	2024
Cash Flows from Operating Activities		
Receipts from providing goods or services	31,651	46,064
Cash receipts from other operating activities	2,400	1,600
GST	846	(6)
Payments to suppliers and employees	(36,220)	(42,803)
Total Cash Flows from Operating Activities	(1,323)	4,854
Net Increase/(Decrease) in Cash	(1,323)	4,854
Bank Accounts and Cash		
Opening cash	54,734	49,879
Net change in cash for period	(1,323)	4,854
Closing cash	53,411	54,734

This statement has been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.

Statement of Accounting Policies

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

'How did we do our accounting?'

Basis of Preparation

The entity has elected to apply PBE SFR-A (NFP) Public Benefit Entity Simple Format Reporting- Accrual (Not-For-Profit) on the basis that it does not have public accountability and has total annual expenses equal to or less than \$2,000,000. All transactions in the Performance Report are reported using the accrual basis of accounting. The Performance Report is prepared under the assumption that the entity will continue to operate in the foreseeable future.

Goods and Services Tax (GST)

The entity is registered for GST. All amounts are stated exclusive of goods and services tax (GST).

Income Tax

Human Factors and Ergonomics Society of New Zealand is wholly exempt from New Zealand income tax having fully complied with all statutory conditions for these exemptions.

Bank Accounts and Cash

Bank accounts and cash in the Statement of Cash Received and Cash Paid comprise cash balances and bank balances (including short term deposits) with original maturities of 90 days or less.

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.

Notes to the Performance Report

Human Factors and Ergonomics Society of New Zealand For the year ended 31 March 2025

	2025	2024
1. Analysis of Receipts		
Sale of goods or services (commercial activities)		
Conference/Seminar Income	120	30,292
HASANZ Funding Received	15,652	-
Membership fees	15,814	15,772
Prof Membership Application Fees	65	-
Total Sale of goods or services (commercial activities)	31,651	46,064
Other receipts		
Other Revenue	2,400	1,600
Total Other receipts	2,400	1,600
	2025	2024
2. Analysis of Payments		
Costs related to sale of goods or services (commercial activities)		
Advertising / Promotion / HASANZ	593	1,000
Bad Debts Written Off	662	-
Bank Fees	76	187
CIEHF Annual Licence Fee	1,039	-
Conference/Seminar expenses	4,560	23,160
HASANZ Representation	1,000	2,000
IEA Dues	-	551
IEA Representation	586	-
Postage	-	44
Subscriptions	7,416	4,924
Total Costs related to sale of goods or services (commercial activities)	15,930	31,867
Other operating payments		
Administration	19,540	10,301
Consulting & Accounting	750	635
Total Other operating payments	20,290	10,936
	2025	2024
3. Cash Received or Paid for Other Activities		
Loans and borrowings		
Opening Balance	56,087	51,226
Total Loans and borrowings	56,087	51,226
GST		

Opening Balance	(1,353)	(1,347)
GST	846	(6)
Total GST	(507)	(1,353)
	2025	2024
4. Bank accounts and cash		
HFESNZ 00	53,411	54,734
Total Bank accounts and cash	53,411	54,734

5. Commitments

There are no commitments as at 31 March 2025 (Last year - nil).

6. Contingent Liabilities and Guarantees

There are no contingent liabilities or guarantees as at 31 March 2025 (Last year - nil).

7. Related Parties

There were no transactions involving related parties during the financial year (Last year - Nil).

8. Events After the Financial Year End

There were no events that have occurred after the financial year end that would have a material impact on the Performance Report (Last year - nil).

9. Ability to Continue Operating

The entity will continue to operate for the foreseeable future.

Human Factors and Ergonomics Society of New Zealand (049-823-215)
2025 Club or Society summary (IR9)

001
1 April 2024 - 31 March 2025

Taxable income	0.00
Tax on taxable income	0.00
2025 Residual Tax to Pay	0.00

2026 Provisional Tax

2025 residual income tax does not exceed \$5,000.00.
Therefore, there is no 2026 provisional tax payable.

Payment Schedule

	1st Inst. 28/10/25	Terminal 07/04/26	2nd Inst. 07/05/26	Total
2025 Residual Tax to Pay		0.00		0.00
Amounts Due	0.00	0.00	0.00	0.00

Income Tax Return IR9
Individual Taxpayer 2025
1 April 2024 to 31 March 2025

Human Factors and Ergonomics Society of New Zealand
049-823-215
001

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Summary of IRD transmission

10	Residential income indicator	
10A	Gross residential rental income	0.00
10B	Net bright line profit	0.00
10C	Other residential income	0.00
10D	Total residential income	0.00
10E	Residential rental deductions	0.00
10F	Excess residential rental deductions brought forward	0.00
10G	Residential rental deductions claimed	0.00
10H	Net residential income	0.00
10I	Excess residential rental deductions carried forward	0.00
11A	Interest incurred	0.00
11B	Interest expense claimed	0.00
12	Property profit loss	0.00
13	Net profit/loss - Friendly society	0.00
14	Interest - Sport/Racing club	0.00
14A	Dividends - Sport/Racing club	0.00
14B	Māori authority dist – Sport/Racing clubs	0.00
14C	Other income - Sport/Racing club	0.00
15	Interest - Other clubs and societies	0.00
15A	Dividends - Other clubs and societies	0.00
15B	Māori authority dist – other clubs/societies	0.00
15C	Other income – Other clubs and societies	0.00
15E	Exemption for non-profit bodies	0.00
17	Donations deduction amount	0.00
19	Losses brought forward	0.00
20	Taxable income	0.00

Tax calculation

21	Tax on taxable income	0.00
21A	Overseas tax paid	0.00
21C	Total dividend imputation credits	0.00
21D	Excess imputation credit brought forward	0.00
21G	RWT tax credits	0.00
21I	Other tax credits	0.00
RDBF	Non-refundable R&D tax incentive credits brought forward	0.00
RDN	Non-refundable R&D tax incentive credits	0.00
RDR	Refundable R&D tax incentive credits	0.00
21J	Residual income tax	0.00
	Debit or credit indicator	Debit
21L	Refund or tax to pay	0.00
	Refund or tax to pay indicator	To Pay

Refund

22A	Transfer to 2026 provisional tax	0.00
22B	Year to be transferred to	
22C	Transfer to other client	0.00
23	provisional commencement date	
24	Provisional tax option	Standard
24A	2026 provisional tax payable	0.00

Disclosures

8	Is the club or society incorporated?	No
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Income Tax Return IR9
Individual Taxpayer 2025
1 April 2024 to 31 March 2025

Human Factors and Ergonomics Society of New Zealand
049-823-215
001

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Summary of client information (this is not transmitted to IRD)

IRD Number	049-823-215
Name	Human Factors and Ergonomics Society of New Zealand
Postal address	9 Shillingford Boulevard Rolleston
Suburb and city	Rolleston 7615 New Zealand
Street address	9 Shillingford Boulevard Rolleston
Suburb and city	Rolleston 7615 New Zealand
Contact phone number	0272636310
Account name	
Bank account number	
Commencement date of Club or Society.	

Inland Revenue privacy statement

Meeting your tax obligations means giving Inland Revenue accurate information so they can assess your liabilities or your entitlements under the Acts they administer. They may charge penalties if you don't. Inland Revenue may also exchange information about you with: some government agencies, another country if they have an information supply agreement with them, Statistics New Zealand (for statistical purposes only). If you ask to see the personal information Inland Revenue hold about you, they will show you and correct any errors, unless they have a lawful reason not to. Call Inland Revenue on 0800 377 774 for more information. For full details of Inland Revenue's privacy policy go to www.ird.govt.nz (keyword: privacy).

Declaration

The information in this return is true and correct and represents my assessment for the year ended 31 March 2025 as required under the Tax Administration Act 1994

Signature: 

Date:
Jul 8, 2025

This hard copy or electronic version must be retained.

Human Factors and Ergonomics Society of New Zealand (049-823-215)
2024 Club or Society summary (IR9)

001
1 April 2023 - 31 March 2024

Taxable income	0.00
Tax on taxable income	0.00
2024 Residual Tax to Pay	0.00

2025 Provisional Tax

2024 residual income tax does not exceed \$5,000.00.
Therefore, there is no 2025 provisional tax payable.

Payment Schedule

	1st Inst. 28/10/24	Terminal 07/04/25	2nd Inst. 07/05/25	Total
2024 Residual Tax to Pay		0.00		0.00
Amounts Due	0.00	0.00	0.00	0.00

Income Tax Return IR9
Individual Taxpayer 2024
1 April 2023 to 31 March 2024

Human Factors and Ergonomics Society of New Zealand
049-823-215
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21J	Residual income tax	0.00
	Debit or credit indicator	Debit
21L	Refund or tax to pay	0.00
	Refund or tax to pay indicator	To Pay

Refund

22A	Transfer to 2025 provisional tax	0.00
22B	Year to be transferred to	
22C	Transfer to other client	0.00
23	provisional commencement date	
24	Provisional tax option	Standard
24A	2025 provisional tax payable	0.00

Disclosures

8	Is the club or society incorporated?	No
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Income Tax Return IR9
Individual Taxpayer 2024
1 April 2023 to 31 March 2024

Human Factors and Ergonomics Society of New Zealand
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Commencement date of Club or Society.	

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Jul 8, 2025

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