

# Annual Impact Report

2021-2022



**Community  
Foundations  
of NZ**

Hei whakakaha i ngā  
hāpori o Aotearoa

# Reflections on a stellar year



**Raymond Key,**  
Board Chair

**The Community Foundations of New Zealand network has a wide range of regional priorities, sizes, strategies, governance and foundation models. This diversity is our strength, and essential to creating a future where everyone belongs.**

When I look to the future I'm inspired by what I see on the horizon, new opportunities for innovation that will resource and empower Community Foundations. Expanding generosity, building regional wealth, and leveraging local and national partnerships to deliver impact and transform communities is encouraging right now, but immensely inspiring for our collective future.

The cornerstone we possess as a network of Community Foundations is our endowments which represent a powerful gifted asset that has impact as invested capital, as dollars granted into community, as well as exponentially increasing the impact of Community Foundations in community over time. I believe we will continue to see over time a deepening of our ability to collectively lead and deliver impact across Aotearoa NZ. The price of this future is our day-to-day vigilance right now, our clarity of strategy, our commitment to seizing upon opportunity, and ability to innovate and collaborate effectively. What an exciting journey and future possibility we share together.



**Arron Perriam,**  
Executive Director

**Kia ora koutou katoa, Community Foundations of New Zealand (CFNZ) exist for two main purposes, firstly to support the success of our 17 regional Community Foundations, and secondly to promote our smarter giving model to grow generosity in giving, and make a meaningful impact with Kiwis and the places who need it most.**

Needless to say, partnering with you and your generosity to create opportunities, inspire futures, and ensuring equity is our absolute passion and privilege.

There is no doubt the past year or two have presented some very real challenges for us all, as citizens and as charitable organisations, but as we all know, tough times create opportunities to learn and grow. Even in tough times, we here at CFNZ have learnt just how generous Kiwis are, the growth over the past year has been mind-blowing, with 1000 new funds being established, over \$9 million dollars granted into communities, and 22% growth in total funds managed. Tough times it may have been, but boy, clearly New Zealander's want to do the little bit they can to make a difference, make it smarter, and really make it count. Thank you for entrusting our Community Foundation members throughout Aotearoa New Zealand and partnering with us to express your generosity. Ngā mihi nui.



# Arc

**Our vision:**

**Strengthening the  
communities of Aotearoa  
New Zealand - Hei whakakaha,  
i ngā hāpori o Aotearoa.**



# ohad



## Our Patron

The Right Honourable Dame Cindy Kiro, GNZM, QSO, Governor-General of New Zealand is the first Māori woman to be appointed as Governor-General and is a champion for social justice, equity and public health. Her guiding principles of kaitiakitanga, oranga and manaakitanga align closely with those of Community Foundations and, over her term in office, we are honoured to have her as Patron for our mahi and our mission.



# Our commitment to Te Tiriti o Waitangi

Community Foundations of New Zealand recognises the role of Te Tiriti o Waitangi/The Treaty of Waitangi as the foundational document for Aotearoa New Zealand and we recognise that the principles in Te Tiriti must guide and inform our practice, both individually and collectively. We are committed to growing our Te Ao Māori knowledge and our understanding of what it means to authentically work in partnership with Māori in communities.

# Our Board

At our AGM in November, we were immensely proud to welcome Dame Fran Wilde, Amy Carter, Ranei Wineera-Parai and Nick Thompson as new board members to the Board of Community Foundations of New Zealand.

The photo shows our harakeke (flax) weaving, a symbolic way to represent the skills and diversity of our board and team. Kia whakatōmuri te haere whakamua, we look forward to dedicating our time and skills for the benefit of Aotearoa NZ's communities.

**“Our board comes from experienced and diverse viewpoints across the charity, philanthropy, health and business sectors. As a board, we are focused on supporting our member's success so that they can build local philanthropy and be true leaders of transformation in communities.”**

**- Raymond Key, Board Chair**



The CFNZ team (L-R) - Amy Carter, Eleanor Cater, Ranei Wineera-Parai, Arron Perriam, Holly Snape (by video link), Nick Thompson, Raymond Key (Chair), Lori Luke, Dame Fran Wilde, Gabrielle Sturrock.

## The Community Foundations of NZ Board 2021-2022:

<b>Board Chair</b>	Raymond Key	Chair of Wakatipu Community Foundation
<b>Deputy Chair</b>	Lori Luke	CEO of Acorn Foundation, Western Bay of Plenty
	Amy Carter	CEO of The Christchurch Foundation
	Holly Snape	CEO of Community Waikato/Trustee of Momentum Waikato
	Gabrielle Sturrock	Major Gifts Specialist at the Malaghan Institute of Medical Research
	Nick Thompson (PhD)	Marketing Manager at Physiotherapy NZ
	Dame Fran Wilde	Chair of Nikau Foundation, Wellington
	Ranei Wineera-Parai	Executive Cultural Advisor for the New Zealand Health Group

## Departing board members in November 2021:

<b>8 years on the board</b>	Bill Holland	Founder of Acorn Foundation, Western Bay of Plenty, and CFNZ's inaugural Chair
<b>6 years on the board</b>	Chris Milne	Trustee and former Chair of Nikau Foundation, Wellington

**Thank for your leadership and dedication over many years, ngā mihi nui.**

# Strategy reflection

**At CFNZ, strengthening the communities of Aotearoa NZ, ‘Hei whakakaha, i nga hapori o Aotearoa’ is what gets us up in the morning.**

Imagine going to work each day being able to provide a vehicle for generosity, building regional wealth throughout New Zealand, and inspiring everyday Kiwis to partner with us to create a stronger Aotearoa NZ: this is what we have the privilege to do.

Our goals are simple and fourfold; to ensure every New Zealander has access to a high-performing Community Foundation; a future where NZ communities have all the funding they need; together communities are transformed; inspiring generosity.

We achieve this by directing our focus on building awareness of our community foundation member network; facilitating connection and learning; being pragmatic and serving the success of our member network; and by inspiring leadership and growth.

**Our shared vision for CFNZ is underpinned by some fundamental values we all share, they include;**

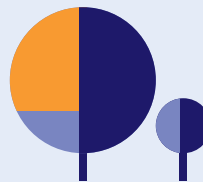
## CFNZ Focus



**Drive awareness  
to attract support  
for network**



**Facilitate connection  
and learning in  
the network**



**Enhance the service  
to the network**



**Inspire leadership  
within the network**



# Our values

**Generosity**

**Respect**

**Service to  
members**

**Inclusiveness**

**Impact**

**Innovation**





# New Executive Director appointed



**“At CFNZ we are all about purposeful partnerships that together bring influence, grow generosity, and help shape the future of NZ communities. In partnership with generous locals we can together grow strategic and impactful funding in communities.”**

**- Arron Perriam,  
Executive Director**

In May 2021 Arron Perriam was appointed as Executive Director. Arron’s experience spans the NZ charity, philanthropy and commercial sectors over the past 30 years.

He holds a number of governance roles, all of which contribute to the wellbeing of everyday kiwis, including sitting as an independent board member with The Salvation Army of NZ, Fiji, Samoa and Tonga.

Proud of his Rongowhakaata descent, Arron joined Community Foundations of NZ from his most recent role as CEO of Cholmondeley Children’s Centre in Canterbury. He is based in Ōtautahi-Christchurch, is a keen trail runner, a musician and is a very proud koro/grandfather to his 5 mokopuna.



# Our Ambassadors



**“I support the Community Foundations’ model because it has a really proud local focus and enables everyone to be a philanthropist, affecting lasting change in their community. As a not-for-profit model, it is authentically about community and the future local people want to create. I’m really proud to be an ambassador for their mahi.”**

**- Sir Stephen Tindall, 2022**

CFNZ’s founding Ambassadors (from left) Bill Holland, Sir Stephen Tindall and Neil Craig.

**Founder of the Acorn Foundation, CFNZ’s inaugural Chair and a Board member for 8 years, Bill Holland was appointed as CFNZ’s first Life Member and Ambassador, at the CFNZ AGM in November.**

In February 2022, Neil Craig and Sir Stephen Tindall joined Bill Holland, as Founding Ambassadors for CFNZ.

The story goes that, around 2002, Bill Holland and Stephen Tindall, old friends from college days, discovered the idea of Community Foundations, already well established in the USA. Together with Neil Craig, Bill and Stephen helped to establish the Acorn Foundation based in Tauranga, which has grown over time to be one of New Zealand’s largest Community Foundations.

In 2017, the trio supported the establishment of Community Foundations of New Zealand, with The Tindall Foundation and Craigs Investment Partners coming on board as strategic funding partners.

We thank Bill Holland, Sir Stephen Tindall and Neil Craig for sharing the vision, spreading the love and supporting the growth and capability of Community Foundations across Aotearoa New Zealand.

Their vision and support has been a crucial element in our network’s growth and transformative impact.

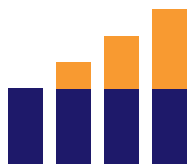
# Our smarter giving model

**We are all about enabling generous Kiwis to leave a lasting legacy in the community that they love. Our value-add is in the philanthropy service we provide and our core difference is in our local knowledge and our smarter funding model:**

**Here's how it works:**



**Your gift**



**is invested  
and grown**



**and the  
ongoing income  
earned**



**goes to the  
local causes  
you love.**

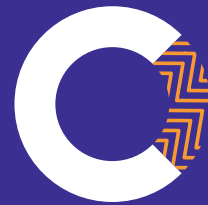
Donors can choose causes close to their heart, or leave it up to our community-centric and volunteer boards to guide where funding is needed most in local communities, making an impact long into the future.

**“Giving through a Community Foundation is a kaitiaki role for society; we can all play a part in being guardians for New Zealand’s future,”**

**- Adrian Orr, Governor of the Reserve Bank of NZ, Te Pūtea Matua**



# Our year 2021-2022



**Community  
Foundations  
of NZ**

Hei whakakaha i ngā  
hāpori o Aotearoa

## Our wins

**Fresh and focused  
new CFNZ board  
including 4 new  
trustees.**

**Commitment  
to diversity of  
governance  
leadership.**

**Te Tiriti Training  
& \$50K grant  
for membership  
training.**

**Arron joined the  
CFNZ team.**

**Increased marketing  
investment –  
developed and filmed  
Big Dreams Can  
Happen campaign.**

**Enabled network  
professional  
memberships with  
Philanthropy NZ  
and the Fundraising  
Institute of NZ.**

**National  
ambassadorship  
programme  
launched.**

## Our activities

- Delivered strategy workshops and board self-reviews in 4 regions
- Supported Executive Officer and Trustee development
- Planned and replanned our national conference through extraordinarily challenging times!
- Ran a workshop day for 16/17 member foundations
- Further development of member resources
- Group Insurance package launched
- Major media articles, White Paper to Professional Advisors launched, growing social media activity
- Grown our partners and sponsorship agreements
- Facilitated local hui in Taupo for 5 CFs
- Supported 3 new foundations through Tindall milestones programme
- Initiated discussions for a new Community Foundation in Southland
- Began development on a national standards programme

**4**

**Webinars.**

**23**

**CF visits.**

**4**

**Management  
meetings.**

**2**

**Chair  
meetings.**

**12**

**Newsletters.**

**2**

**Membership  
surveys.**



# Our network growth

**\$231**

**Million**

funds under  
management.

**1486**

**Grants**

made to local  
communities in  
the past year.

**\$9**

**Million**

granted to  
communities  
throughout  
Aotearoa NZ in  
the past year.

**119**

New funds  
launched in  
the past year.

**\$527**

**Million**

in anticipated funds  
for the future.

**Focus on supporting  
the everyday success  
of local CFs.**

# Our network growth

## A new way of giving that saw exponential growth across Aotearoa NZ – 33% in one year alone!

In August, we reported that Community Foundations have seen a rapid increase in their invested funds under management, a staggering growth of 33% in one year.

Chair of Community Foundations of New Zealand, Raymond Key, said much of it was down to kiwi generosity. “We are a very generous nation and, increasingly New Zealanders like to see their generosity really making a difference. Kiwis really like this model of giving in a strategic way to communities.”

“Community Foundations are becoming a serious funding entity, distributing \$50m into NZ communities in the past 5 years. It’s incredible to see what is being achieved from local generosity, and this is starting to really make a difference in communities.”



**“Kiwis are very generous and one of the fastest growing generosity intermediaries is the Community Foundations movement. They harness the generosity of a region, invest gifts and ensure donations make a real difference in our own back yard. It’s heartening to see their increased growth which is building philanthropy in communities in Aotearoa NZ.”**

- Sue McCabe, CEO Philanthropy NZ, August 2021



**“Community Foundations can assist people to make an impact in their local community and help them create their enduring legacy. This is demonstrated by our extraordinary growth of 33% over the last 12 months, during one of the most challenging periods in New Zealand’s history.”**

- Raymond Key, August 2021



# Our members



**Auckland  
Founda+ion**



**CHRISTCHURCH  
FOUNDATION**



**Check out stories from  
our members in the  
sections following.**

**“Here at CFNZ we are proud to work in partnership with our 17 member foundations for a better, stronger Aotearoa New Zealand. Thank you for all that you do, growing funds and community impact across Aotearoa NZ - hei whakakaha i ngā hāpori o Aotearoa.”**

**- Eleanor Cater, Marketing and  
Membership Services Director**

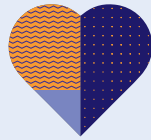


# Our strategic partners

**Thank you for your vision, helping us to strengthen the communities of Aotearoa NZ from within, building philanthropy and community impact.**







# Spotlight on Craigs Investment Partners' corporate giving

Our founding partner, Craigs Investment Partners, and their teams across Aotearoa NZ, have really taken on board the idea of showing corporate social responsibility in communities.

Through New Zealand's network of Community Foundations, in December the Craigs team gifted over \$150k to local communities, with the local Community Foundation helping to channel their gifts to where they were needed most at Christmas.

Craigs also has almost 50% of their 650 staff participating in a community-focused workplace giving programme. Founder Neil Craig says "Community Foundations make it very simple to execute and we have the benefit of leaning on their expertise and directing our donations to those charities that most in need."

Corporate giving with a difference, just when NZ communities need it most. Thank you Craigs for your generosity. Ngā mihi nui.



Good Neighbour, Tauranga, was one of the many recipients of the 2021 Craigs Christmas giving programme.



**"Our partnership with CFNZ has really solidified our dedication to corporate social responsibility in a meaningful way. It is helping us to build our team culture, and our commitment to the communities that we work in, at the same time helping to drive the development and growth of our business."**

**- Neil Craig, Craigs Investment Partners and CFNZ Ambassador**



# Statement of Financial Performance

## Community Foundations of New Zealand Incorporated For the year ended 31 March 2022

‘How was it funded?’ and ‘What did it cost?’

Revenue	Notes	2022	2021
Donations, fundraising and other similar revenue	1	150,289	170,295
Fees, subscriptions and other revenue from members	1	45,684	50,082
Interest, dividends and other investment revenue	1	4,064	23
Other revenue	1	46,000	10,500
<b>Total Revenue</b>		<b>246,037</b>	<b>230,900</b>

### Liabilities

Volunteer and employee related costs	2	166,328	74,013
Costs related to providing goods or service	2	43,729	19,674
Other expenses	2	59,343	53,873
<b>Total Expenses</b>		<b>269,400</b>	<b>147,560</b>

<b>Surplus/(Deficit) for the Year</b>		<b>(23,363)</b>	<b>83,340</b>
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This statement has been prepared without conducting an audit or review engagement, and should be read in conjunction with the Compilation Report.

# Statement of Financial Position

## Community Foundations of New Zealand Incorporated As at 31 March 2022

‘What the entity owns?’ and ‘What the entity owes?’

<b>Assets</b>	<b>Notes</b>	<b>31 March 2022</b>	<b>31 March 2021</b>
<b>Current Assets</b>			
Bank accounts and cash	3	324,205	201,638
Debtors and prepayments	3	90	75,000
<b>Total Current Assets</b>		<b>324,295</b>	<b>276,638</b>
<b>Non-Current Assets</b>			
Property, Plant and Equipment	5	1,607	-
<b>Total Non-Current Assets</b>		<b>1,607</b>	<b>-</b>
<b>Total Assets</b>		<b>325,902</b>	<b>276,638</b>
<b>Liabilities</b>			
<b>Current Liabilities</b>			
Creditors and accrued expenses	4	29,627	-
Unused donations and grants with conditions	4	83,000	40,000
<b>Total Current Liabilities</b>		<b>112,627</b>	<b>40,000</b>
<b>Total Liabilities</b>		<b>112,627</b>	<b>40,000</b>
<b>Total Assets less Total Liabilities (Net Assets)</b>		<b>213,275</b>	<b>236,638</b>
<b>Accumulated Funds</b>			
Accumulated surpluses or (deficits)	7	213,275	236,638
<b>Total Accumulated Funds</b>		<b>213,275</b>	<b>236,638</b>

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

# 2021 - in the news!



Vicky and John Haylock and their personal endowment fund with Taranaki Foundation featured in our media work over the course of Wills Month in September 2021.

Sunday Star Times article in September about 'The new philanthropists: how every day kiwis are making a difference' through their local Community Foundation.

→ <https://www.stuff.co.nz/business/126163527/the-new-philanthropists-how-everyday-kiwis-are-making-a-difference>

## A whole new way of estate gifting taking off in NZ

BY ELEANOR CATER

16 SEPTEMBER 2021 9 MINUTE READ

September is Wills month, and Eleanor Cater from Community Foundations looks at endowment funds, an option for clients to make big, strategic gifts for charitable benefit.

We are all familiar with charity giving, whether it be a few coins in a bucket at the train station, regular giving through appeals or leaving a bequest to a favourite charity in a will.

What's not so understood is the idea of endowment fund giving: an option for clients to make big, strategic gifts for charitable benefit which can be invested in perpetuity, without the need to establish their own charitable trust.

In September, we were also honoured to be featured in Lawtalk, the New Zealand Law Society's magazine, all about endowment funds and how they are a whole new way of estate gifting in Aotearoa NZ.

→ <https://www.lawsociety.org.nz/news/lawtalk/lawtalk-issue-947/a-whole-new-way-of-estate-gifting-taking-off-in-nz/>



Sir Stephen Tindall has long been an advocate for Community Foundations and in this May 2021 article he encourages New Zealanders to consider perpetual giving through Community Foundations.

→ <https://www.stuff.co.nz/nelson-mail/300317545/philanthropist-encourages-perpetual-giving-through-community-foundations>

# White Paper: Community Foundations

- a new way of thinking about charity, philanthropy and working with clients.

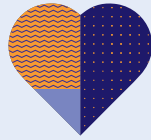
Community Foundations of New Zealand were delighted in 2022 to team up with the Dentons Kensington Swan team, to co-write this White Paper: Community Foundations - a new way of thinking about charity, philanthropy and working with clients.

→ [Read the white paper here.](#)

“The charity sector is changing and communities are looking for smarter ways to manage community funds. Generous locals are looking for an easy way to leave a personal local legacy. Having an all-encompassing, well-governed structure for communities, simply makes a lot of sense.”

**“I’m a really proud advocate for Community Foundations. They can be a really effective and efficient way to execute a client’s philanthropic strategy because they have all the audit, governance and management structures already in place. And, as not-for-profits, they maximise returns to community.”**

**- Henry Brandts-Giesen,  
Head of Private Wealth,  
Dentons Kensington Swan.**



# Spotlight on working in partnership with professional advisors

**Community Foundations build connections with local professional advisors, and act as a trusted and independent advisor of philanthropy in local communities.**

## **‘A whole new way of estate gifting’**

Alongside traditional charity giving, and on occasion talking with clients about setting up their own charitable trusts, increasingly Feilding-based lawyer Kirsten Harper has been talking with her clients about a third option – setting up their own endowment fund, to be invested alongside others, with Te Awa Community Foundation.

“The problem with trusts is that you always have to be forward planning for longevity, and they can have a shelf life that might be remarkably small once the settlors of the trust have died. From a legal perspective, there must be trustees

in place and it’s always going to be a challenge to find like-minded people to hold the role of trustees, particularly if the purpose for which the trust was settled is quite specific”.

Kirsten says that she loves that the concept goes further than traditional charity giving. “It’s flexible and people can fit their desire to give something alongside someone else’s. They might not be the same desire, but they are complementary because they form part of a wider community fund, which will in turn provide grants to worthy recipients”.

**Kirsten Harper, Principal at Treadwell Gordon, says that she enjoys talking about estate planning and philanthropy with her clients.**



**“I love the opportunities having these discussions presents. I find many of my clients do want to leave something in their wills for a charitable purpose, however they don’t always know the right vehicle to do this. Te Awa Community Foundation can provide the perfect solution”.**

**- Kirsten Harper**



# New funds benefitting the communities of Aotearoa NZ



# Community

# New fund benefitting Pasifika Youth

Adventure racer Nathan Fa'avae, whose late mother Jan Fa'avae was instrumental in starting an after-school study programme for Pasifika youth in Nelson, has launched the Fa'avae Pasifika Fund to support Pasifika youth in outdoor education.

The Fund will be managed by Top of the South Community Foundation and annual distributions will be directed to Whenua Iti Outdoors.

Gavin Larsen, Executive Officer at Top of the South Community Foundation, says "It's superb to have a fund of this nature under our management, Nathan Fa'ave knows his community and can see a real gap in providing outdoor education to Pasifika youth. It's a great example of how specific the Community Foundation model can be, enabling generous local people to give to what they care about for the long term."



Nathan Fa'avae is carrying on his parents legacy, ensuring Pasifika youth will have opportunities to grow and develop.  
Photo credit: Braden Fastier/Stuff

# Waitangi National Trust Endowment Fund launched

**In 2021 The Waitangi National Trust Endowment Fund was launched, to be managed by Northland Community Foundation.**

This Fund will help create a sustainable future for Waitangi, with donations received being invested and the annual interest delivered out to support the conservation, maintenance and preservation of heritage buildings at the Waitangi Treaty Grounds. Funds can also support the provision of education programmes for New Zealanders, especially tamariki, and conservation of native wildlife at Waitangi.

Chief Executive of the Waitangi National Trust, Greg McManus, says that the aim of the fund is to “provide a sustainable source of income for Waitangi forever. It is my hope that this endowment fund it will help create a more sustainable, independent future for Waitangi.”





# PRIDE Fund Launched in Christchurch to support the LGBTQIA+ community, forever

To coincide with PRIDE 2021 Christchurch Foundation launched a PRIDE endowment fund, with founding gifts from Deputy Mayor Andrew Turner, and Kathmandu.

This fund, a first for New Zealand, will have its capital invested, with the resulting income utilized to support the Rainbow community of Christchurch.

Annual applications will be called to be considered by a new distribution committee, made up of Foundation and PRIDE representatives.



Akira Le Fevre, member of Christchurch's PRIDE Committee, celebrates Christchurch Foundation launching their PRIDE Endowment Fund, a first for NZ.

**CHRISTCHURCH  
FOUNDATION**



# Trust resettlements



# Together

**Community Foundations across NZ have resettled over \$40m in existing community or trust funds, with discussions ongoing in communities around future resettlements.**

For existing Charitable Trusts (or for anyone considering establishing one) the local Community Foundation can offer easier options for management around compliance, investments, effective grant making and more. They have the existing governance, audit and management structures already in place and can pool community funds, meaning economies of scale and maximising returns to communities.

# Resettling the assets of a respected Waikato Trust

**Momentum Waikato Community Foundation resettled the assets of The Donny Charitable Trust, which came into existence in the early 1990s when Frank and Germaine Donny both left their estates to the Trust.**

With the trustees getting older and capital management and legal compliance becoming more complex, the trustees decided to transfer the \$11m of assets and their administration to Momentum Waikato Community Foundation. This will ensure the continuation of their trust's mission, including maintaining their established commitments.

Distributions from the trust fund will continue to go towards palliative care nurse training, agricultural education and child protection.



The Donny Charitable Trust has transferred its funds to the administration of Momentum Waikato Community Foundation, which will continue on with its purpose, including funding child protection services.

# Sally Lusk's legacy lives on

**The late Sally Lusk's legacy will live on with proceeds from the recent sale of a Havelock North property where she ran The Lusk Centre to enrich the lives of the village's elderly, now being donated, to be invested in perpetuity with Hawke's Bay Foundation.**

The transfer of the estate, (worth over \$1m) has launched the newly named Sally Lusk Fund.

Hawke's Bay Foundation's Executive Officer Amy Bowkett says that 'Named Funds' are increasing in popularity as people contemplate what sort of legacy they'd like to leave on the world. "More and more, families are looking around for causes close to their hearts that they can support. Unlike other charitable giving, a one-off donation made through Community Foundations grows and keeps on giving, forever. It's the smarter way to give."



The late Sally Lusk, receiving a Civic Award for services to the community.

**LIVE  
HERE  
GIVE  
HERE**



# A resettled fund enables local scholarships



The St Andrews Youth Fund was seeded from the proceeds for the sales of the St Andrews Golf Course. It will continue to support youth scholarships in perpetuity, through Aoraki Foundation in South Canterbury.

**The St Andrews Youth Endowment Fund was established in 2021 by the St Andrews Golf Club from the proceeds of the sale of the course.**

The fund's purpose, safeguarded for the future by Aoraki Foundation in South Canterbury, is to provide scholarships to people under the age of 18 years who are living or were born living in the St Andrews area. Scholarships are to be awarded young people in the pursuit of sporting, cultural or academic excellence.

The fund had \$2400 available for distribution in its first round, and this has been awarded to four young leaders to follow their chosen areas of interest.

Congratulations to the scholarship winners, and to the community for resettling these funds with their local Community Foundation, where they will continue to give back in perpetuity.



# Community impact

# Impact



# Shifting the lens to community impact in Wellington

An important part of effective grant making is assessing where the biggest opportunities for philanthropic impact lie. But it can also be the most difficult. For a funder, if you have two very similar applications from two organisations with an equally incredible kaupapa, who gets funding?

## Porirua's Pinikilicious - impacting Pacific health

With over 30-years' experience working in education and volunteering for community causes in Porirua Pinikilicious Co-Founder, Caroline Mareko knows how to make things happen. So, when the question came up, "what are we going to do about Pacific Women's Health?", she knew exactly where to start.

A Pinikilicious event follows a simple, relaxed format, which aims to deliver a fun day out while creating a safe space in which women's health issues can be comfortably discussed.

Since their first event, Pinikilicious are proud to have directly referred over 750 women for breast screenings.

By overlaying this grant-making framework, Nikau identified that Pinikilicious were working towards three separate Sustainable Development Goals. Through this process, they were able to prioritise and provide funding to Pinikilicious from their Porirua District Fund to assist with event operating costs.

**"Adopting the United Nation's Sustainable Development goals as a grant-making framework allowed us to step back and approach important yet challenging funding decisions with a higher degree of clarity and context. While focusing local, it is incredible to align with a global movement in this way."**

**- Em Lewis, Executive Director**



Pinikilicious: empowering Pacifica women to take charge of their health, one of the many impactful initiatives supported by Wellington's Nikau Foundation, now aligning their grant-making with the United Nation's Sustainable Development Goals.

# Shifting the dial around the welfare of children

The Totara Fund was started by a local Auckland family who saw the struggles in their community and wanted to personally make a real difference.

They've since grown the fund to support family wellbeing across Tāmaki Makaurau.

The initial focus of Totara Fund was around welfare of children, however it soon became apparent that this often starts with factors beyond a child's control. The fund now supports the well-being of families with the overarching belief that if we can assist the parents to navigate their lives successfully, then by default we assist the children.

Since establishing the Fund with Auckland Foundation it has provided support for The Brainwave Trust, Big Buddy, Te Whakaora Emotional Healing and Family Restoration programmes as well as counselling services at CARE Waitakere to meet the critical need arising from the Covid-19 pandemic.



**“The positive impact of Te Whakaora Tangata’s Kia Kaha programme has been made possible through the generous support of the Totara Fund. The funding has been vital to the successful delivery of the Kia Kaha programme, where evaluations show an 81% of clients reported an improvement in mental health, 75% noting an improvement in depression and anxiety, 80% reported an improvement in social connectedness, and 58% reporting a reduction in domestic abuse.”**

**- Programme Manager from Te Whakaora Tangata’s Kia Kaha programme**

# Impacting lives for hearing and visually impaired

**Taranaki Foundation's Hearing and Visual Impairment Fund was established to help Taranaki people who have a hearing or visual impairment to access equipment or technology that can have a transformational impact on their daily lives.**

Through the generosity of a local donor, Taranaki Foundation were able to distribute grants that allowed six individuals to purchase specialist equipment. "We've been honoured to work with this kind, giving donor to help fulfill the dreams of people with hearing disabilities," says Taranaki Foundation Chief Executive Josh Hickford.

Over the last 5 years grants have been given by the donor for specialist smoke alarms for deaf children; cochlear implant covers to enable children with implants to be able to hear while swimming or playing sport in the rain; assistive technology for learning and working; a tandem



bike for a keen blind cyclist and a static exercise bike to help a visually impaired student keep fit and enjoy movement. One of the young Taranaki students who recently received hearing aids said, "These hearing aids mean so much to me as I can finally hear what people are trying to say to me. They really are a game changer for me – hearing is such a relief!"



# Building the hub of community



**The Waikato Regional Theatre will be an impressive state-of-the-art, world-class performance venue with a stunning vista of the Waikato awa - the pride of Kirikiriroa-Hamilton.**

Momentum Waikato Community Foundation has been leading the Theatre project since its inception in 2016. Working with a range of partners, including mana whenua, the business community, local and central government and community funders, the Momentum

Waikato team have skillfully ushered this transformational project into emerging reality.

The new multi-purpose performing arts centre that will transform the Hamilton CBD, catalyse local creative industries and drive the Waikato's cultural life and identity for decades to come.

Construction work on the Waikato Regional Theatre got underway in October 2021, with opening night scheduled for early 2024.

Meanwhile, Momentum Waikato Community Foundation continues on with the dual mission of building a new and impactful regional endowment fund, and driving more transformational projects for the local community.

# Stories of generosity



# Give

# School Principal's legacy continues to grow a future for youth.

Carlos Reed was the first principal of Otangarei Primary School and, when he passed away in 2005, he left the Carlos Reed Fund as a legacy for Otangarei students.

The fund started with an original gift of \$100k as a gift in his will which today, through the Northland Community Foundation investment model, has grown to \$188k. The fund now gifts a \$10k scholarship every three years to a high-achieving student from Otangarei Primary School.

Thank you Carlos Reed for your vision, making education opportunities available for all.



(Centre) Teru Carrington-Barlett, recent recipient of the Carlos Reed Scholarship through Northland Community Foundation, with her supporters.

# Improving the literacy of children

**Merle Cooney wanted to make a difference to improving the literacy of local primary school children in and around the Ashburton district.**

So, in 2013, Merle made a donation to Advance Ashburton Community Foundation and asked them to find the most effective way to deliver on her wishes.

Advance Ashburton consulted with the team at the Ashburton Learning Centre and the BOOST child literacy project was developed.

The programme has grown from strength to strength and this year is now available in 20 schools in the Ashburton District, reaching 200 children with the help of 60 volunteers.

“Having been trained as a teacher, I have a passion to see children succeed. I feel a real sense of pride seeing the difference being made through children attending the BOOST programme. By choosing to donate to my passion through Advance Ashburton Community Foundation my donation will continue to make a difference to the Ashburton District well past my lifetime,” Merle said.







A beloved son: Baden McNab, whose early tragic death has led to his parents leaving a legacy for their community, in his name.

### In memorial funds:

## Giving back to community in memory of a beloved son

**Peter and Nellie McNab of Owaka have set up a deeply personal fund in memory of their beloved son, Baden, who died tragically in a diving accident in 2018.**

While they 'like to be discreet' about their community giving, they say this is the exception, wanting Baden to be remembered forever.

The Baden McNab Fund at Clutha Foundation will fund courses for local people to learn advanced snorkeling safety. The Fund will be invested by the Foundation and continue to pay out the interest to run these courses, each and every year, in perpetuity.

Setting up Baden's Fund has also inspired Peter and Nellie to consider wider, long-term support for their community, with the Community Foundation structure making it easy.

# Leaving a rural legacy

**Marnie Anstis has been farming her whole life. As a young child, she often helped her father assist at lambing time. She married a dairy farmer and soon learned to milk their herd singlehanded and later, together with husband Peter, they began a horticultural enterprise of kiwifruit, which now covers over 40 hectares.**

In retirement Marnie became aware of the opportunities presented by Eastern Bay Community Foundation. “Anyone can make a donation (or leave a gift in their will) for a cause that’s dear to their heart - even to smaller organisations that truly add value and richness to the fabric of one’s local community. The donation is invested, and it is the interest it accrues that is paid out each year – forever.”

Marnie made the decision to set up a personal endowment fund with the foundation. “My specific criteria for the fund are to equip a child or adult with essential reading and comprehension skills, and to restore and enhance our natural



environment. Those two objectives are where I want to make a difference and the Community Foundation has a safe, secure, and long-lasting structure to be able to achieve this.”

The Foundation has taken on board Marnie’s vision for her fund and annual distributions from the fund go to the areas of her choice. Alongside this, Marnie has also agreed for the Foundation’s trustees to use their discretion to make further grants to address wider community needs.



## Our founding story:

# ‘The First Remarkable Gift’

We are honoured to be able to tell the story of Edna Brown, whose first remarkable gift seeded the first personal endowment fund in the New Zealand Community Foundations’ network.

Edna’s bequest, invested with Acorn Foundation in 2003, has now given out as much as the original gift and, by 2021, had grown by 44% under our smarter giving model.

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**By Eleanor Cater**

**Edna Brown. It’s a pretty unassuming name and, by all accounts Edna was an unassuming woman who has given a rather remarkable gift, sparking what is today a multi-million dollar network.**

When Edna passed away in 2001 she had left specific bequests to various family and friends, and had left directions to the executors of her estate that they were to divide what remained amongst charities or organisations associated with medical research or treatment.

Her estate executors were unsure about choosing recipients so decided to put the balance of \$67,200 with the fledgling Acorn Foundation, in Edna’s name, with distributions tagged to areas of her interest.

Thus, in 2003, Edna Brown became the first Acorn Foundation donor and seeded the first personal endowment fund ever in the New Zealand Community Foundations network.

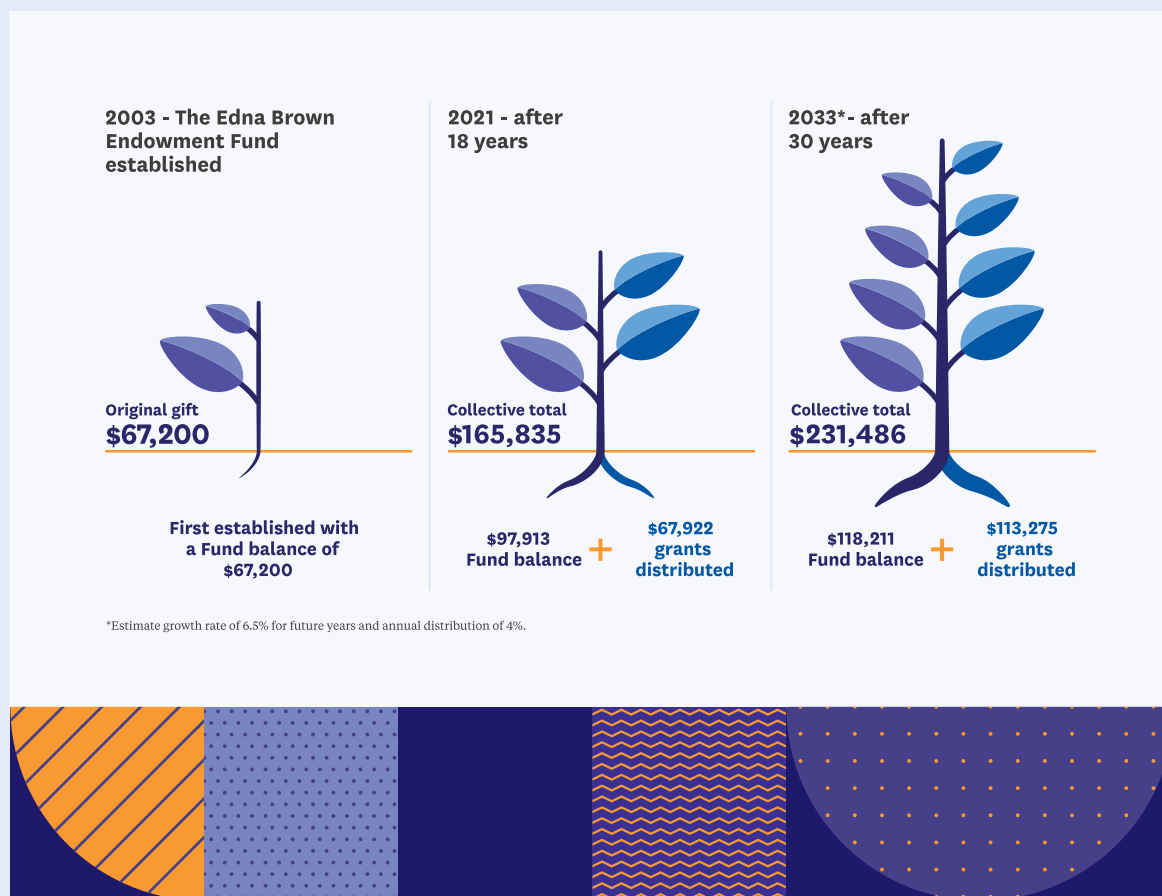
It was certainly a leap of faith on the part of the executors of Edna’s estate, as Community Foundations were not at all well-known in NZ and the model, at that stage, was unproven here.

It turns out that was a very good leap of faith, fast forward to 2021 and Edna’s endowment fund has given out more than the original gift (total grants made to date are \$67,922); and the original gift has grown to be \$97,913.

We often use Edna Brown’s fund example, as it’s the oldest endowment fund in our young network, so we know how it has actually grown and given out over time.

The capital of Edna’s gift has remained intact, it has been safeguarded against inflation and the income is paid out in calculated distributions (typically 4% per annum) to causes which Edna cared about.

## How an Endowment Fund works



Edna chose to support medical research or treatment causes in the Western Bay of Plenty and, to date, her fund has given to 14 different causes - some multiple times.\*

In another 12 years (after 30 years) Edna's fund is estimated to have a cumulative total of a whopping \$231k! And, after 50 years, the cumulative total is estimated to be close to \$400k - six times the original gift!

If that is what it looks like after 50 years, can we even begin to imagine what 'forever' looks like for Edna's remarkable gift to the Western Bay of Plenty?

Sadly, we don't have much in the way of history around Edna. What we do have, is outlined over the page.

Margot McCool, Donor Engagement Manager at Acorn Foundation says, "Edna was like the

vast majority of Community Foundation donors; ordinary people with big and generous hearts. We are so lucky to live in a country with so many Edna Browns"!

They are, after all, the generous people who, through Community Foundations, are building funds for the future of Aotearoa NZ.

There is a saying that we all have three deaths. The first is when you physically die. The second is when you are buried and out of sight.

And the third is that moment, sometime in the future, when your name is spoken for the last time.

We know that your name and gift will never be forgotten, Edna Brown.

Thank you for leading the way for New Zealand, arohanui.



# In memory of Edna Brown

1913-2001

Edna grew up in Rotorua, where she worked in her family's soft drink factory after school. She was the youngest in a family of ten children, five boys and five girls. As a young woman she loved ballroom dancing, at which she excelled.

She married George Brown and they lived in Wellington, where Edna worked in the hotel industry, including managing the Tin Hut Hotel, near Wellington. They had no children, but Edna loved animals, especially cats, and when they later started farming near Te Puke she had names for all the farm animals.

Edna was a very determined lady, and she was always very kind to people who were in need. After her husband died she lived at Omokoroa, then later at Matapihi, and finally in Tauranga. She was very close to a niece who was only 4 years younger, so more like a sister, who also lived in Tauranga.



\*Causes Supported by Edna's endowment fund over 18 years (some multiple times): Te Runanga O Ngai Tamawharua, Diabetes NZ Tauranga Branch, Blind and Low Vision NZ, CanTeen, Arthritis Foundation of NZ, Alzheimers Society Tauranga, The Auckland District Kidney Society, Bay of Plenty Multiple Sclerosis Society, The Parkinson's NZ Charitable Trust, Diabetes NZ Tauranga Branch, Parent to Parent (Coastal Bay of Plenty), The StarJam Charitable Trust, Complex Chronic Illness Support, Recreate NZ.

**“There is a saying that we all have three deaths. The first is when you physically die. The second is when you are buried and out of sight.**

**And the third is that moment, sometime in the future, when your name is spoken for the last time...”**



# The Community Foundation difference

The work of Community Foundations is unique. They have deep roots in communities, utilise community insight and respond to shifting community needs and opportunities. Community Foundations can operate nimbly and, sometimes, take risks or take on innovative community ideas and projects.

**In this section we showcase some of the ways Community Foundations are different.**

## Community Foundations - ensuring sustainable income streams for charities

A professionally managed charity endowment fund can be both a strategic and a smart consideration for a charity. It will return far more to a charity over time than a one-off donation and the perpetuity model ensures a sustainable income stream, forever.

Donors appreciate being given another, more strategic option for supporting the cause that they love and it's fundraising with a strategic lens, appealing to forward-thinking charity boards.

“Increasingly, we are getting enquiries from charities – local and national – about managing their charity endowment funds” says CFNZ Membership Director Eleanor Cater. “Strategic-thinking boards recognise the importance of offering more strategic options for their donors, and of keeping their focus on their mission – not on managing investments, compliance and distributions. Local Community Foundations can really add value to mission-driven charity fundraising and working with donors.”



# Growing a permanent fund for the local hospice

**Five Rotary Clubs in Rotorua made the decision to become more strategic about their fundraising. They joined together to create the Rotary Rotorua Hospice Fund, to support their beloved local hospice for the long-term.**

The Rotary Rotorua Hospice Fund is invested with Geyser Community Foundation and already has over \$200k in donations. As an invested endowment fund, it is already providing a steady income stream to Rotorua Community Hospice, making a \$7k grant in 2021 alone.

The fund will grow from further Rotary fundraising and, says Annette Burgess, Executive Officer with Geyser Community Foundation, “in the future will be supercharged by a number of already confirmed and significant bequests.”



Volunteer teams are crucial to the services provided by Hospice. Photo credit: Rotorua Community Hospice

Jonathan Haggard, CEO of Rotorua Community Hospice, says that the endowment fund has been extremely valuable for them. “The fund has been really helpful for our team when they are talking with donors, many of whom like to see that their donations are being put to work for the long-term. And for the hospice, developing sustainable funding for the future is vital for the ongoing provision of free palliative care for the community.”

# Impact 100 - enabling collective women's giving

In 2021 Wakatipu Community Foundation's women's giving initiative 'IMPACT100 Wakatipu' awarded a whopping \$200k to five local community groups.

Launched in 2020, IMPACT100 is a Women's Giving Circle where the generous donors, each giving \$1000, collectively make decisions on where the funding will go.

The major grant of \$100k went to Pivotal Point to support neurodiverse children and their learning in the Wakatipu. Routeburn Dart Wildlife Trust received \$85k, and 3 'runners up' each received \$5k to continue on with their excellent programmes.





# Charity reporting with a difference

**The Acorn Foundation, based in Tauranga, believes that one of their key responsibilities is to have a deep understanding of the local community sector.**

“Rather than requesting written reports from charities we have funded, we find it far more insightful to meet face-to-face to hear about their latest achievements, challenges, and what they are learning about the communities they serve”, says Community Engagement Manager, Margot McCool.

Each February, Acorn Foundation invites all the charitable organisations they have funded in the past year to join them at round table

discussions, where the organisations can share their thinking with Acorn’s staff, trustees, Distributions Committee members and each other. It’s a win-win, as not only do the sessions reduce the administrative burden on recipient charities when it comes to reporting, but they have also proven much more valuable than a written report.

“These forums provide a great opportunity for more in-depth discussion around current issues that are affecting many organisations and help to guide us in our discussions with the many donors we work with”, says Margot. “The round tables also act as a networking opportunity and foster collaboration amongst these local groups, many of whom have lots of cross-over in the mahi they do.”



March 2021 ‘round table reporting’ session with Acorn Foundation, Bay of Plenty.

# Leading by example

**All of the voluntary board, and the two part-time staff members, at The Sunrise Foundation in Gisborne donate regularly to the Foundation.**

John Clarke, Sunrise Foundation's Chair, says "Together we have donated over \$360,000 since we started six years ago. We're passionate about Sunrise and I think it shows we believe in what we are doing, we put our money where our mouth is."

Everyone donates to different causes and in different ways, some giving annual one-off donations and others regularly through workplace giving.



The board and staff at Sunrise Foundation have donated over \$360,000 to causes they care about through Sunrise. l-r June Hall, David Clark, Richard Briant, Kerry Taggart, Reweti Ropiha, Glenda Stokes, John Clarke (chair) and Colin Christie (deputy chair).







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