



**Community
Foundations**
of Aotearoa NZ

Hei whakakaha i ngā
hāpori o Aotearoa



Annual Impact Report

2022-2023

Reflections on a stellar year



Raymond Key,
Board Chair

Dear Supporters,

As the Board Chair of the Community Foundations of Aotearoa New Zealand (CFANZ), I am pleased to share with you the profound impact we have collectively achieved over the past year. Through evolving collaboration and unwavering commitment, we have strengthened our community's fabric, fostering positive change and supporting community resilience in what has been some very tough times for some communities, particularly those hit by the impact of major weather events.

In 2022, our foundation disbursed grants totalling \$19.4 million, addressing critical needs in areas such as education, the environment, social wellbeing, and the arts. These funds empowered local initiatives that reflect our shared values and vision for a thriving, healthy and connected New Zealand.

Furthermore, our collective efforts have facilitated community engagement and participation, amplifying the impact of grantmaking with direct benefit to community. National partnerships with the likes of Craigs Investment Partners, Fonterra and The Tindall Foundation have enabled us to grow our ability to support diverse projects that make a lasting difference in the lives of those who need it most.

As a member network of community foundations, we remain dedicated to transparency and accountability, ensuring that every dollar entrusted to us is utilised to its fullest potential. The stories of transformation and empowerment emerging from communities are a testament to the collective impact we can achieve when we unite for a common purpose, CFANZ is pleased to be able to bring partners, donors and communities together in this way.

Our goal is to share these stories and make it accessible for more New Zealanders to give within their local communities, to create a lasting impact forever through their own legacy.



Arron Perriam,
Executive Director

Community Foundations of Aotearoa New Zealand (CFANZ) made significant strides to March end 2023 leaving a positive impact on communities throughout Aotearoa New Zealand and with continued endowment growth against what has been stiff market headwinds. Over the past year, CFANZ continued to serve as a catalyst for growing philanthropy, connecting donors with community projects, and responding to community need, with funding exceeding \$19 million over the past year.

CFANZ acknowledges the dedicated work undertaken by its 17 regional community foundations in growing generosity, attracting new donors, community and corporate partners. This growth is a testament to the flourishing reputation of local community foundations and their ability to foster meaningful partnerships with donors, and empower local community organisations, and individuals to create lasting change.

Through strategic grant-making, community foundations contributed to the development of countless community-driven projects across Aotearoa New Zealand, some of which are featured later in this impact report. These initiatives addressed areas including education, wellbeing, environmental conservation, equity, the arts and social deprivation. Our community foundation members show commitment to addressing both immediate and longer-term needs ensures a sustainable and holistic approach to community development.

Finally, I'd like to acknowledge the bighearted generosity of our 150+ volunteer board trustees, and our broader team of wonderful volunteers who last year dedicated over 17,000 hours of their precious time to our community foundation work. Without this aroha and dedication, our mission to link generosity with strengthening communities across Aotearoa NZ simply couldn't happen – thank you!



Our commitment to Te Tiriti o Waitangi

Community Foundations of Aotearoa 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

The Community Foundations of NZ Board 2022-2023:

Board Chair	Raymond Key	Chair of Wakatipu Community Foundation
Deputy Chair	Lori Luke	CEO of Acorn Foundation, Western Bay of Plenty
	Amy Carter	CEO of The Christchurch Foundation
	Josh Hickford	CEO of Taranaki Foundation
	Holly Snape	CEO of Community Waikato/Trustee of Momentum Waikato
	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 2022:

Gabrielle Sturrock	Major Gifts Specialist at the Malaghan Institute of Medical Research, formerly with London Community Foundation.
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Thank you all for your leadership and dedication, ngā mihi nui.



New Board Trustee welcomed in 2022

Following our AGM in November, we were very proud to welcome Josh Hickford, CEO of Taranaki Foundation to the Community Foundations of Aotearoa NZ board.

Taranaki born-and-bred, Josh comes from a finance background and his involvement with local and national charities, coupled with a passion for community, made him a strong leader for Taranaki Foundation. A fellow chartered accountant, Josh has worked at PwC and TSB locally and sits on the NZ Council for CA ANZ (Chartered Accountants Australia and New Zealand).

“Community foundations give us the opportunity, now, to create an even better community for our children, grandkids and all those who follow. Me hoki whakamuri, kia anga whakamua: look to your past experiences in order to forge the future”

Josh Hickford, FCA, CFANZ Board member



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.

New Ambassador Appointed - nau mai Miriama Kamo

Award-winning journalist and presenter, Miriama Kamo, joined our team of CFANZ Ambassadors in June.

Miriama says that community foundations are a 'brilliant concept'. "It can be hard to know where your giving will make the biggest impact. The beauty of community foundations is that advice is available to help achieve impact across your interests – for me that's Te Ao Māori, environment and education. I love that giving can be so specific to the things that matter to me, and can work for the future of Aotearoa."



Our members



**LIVE
HERE
GIVE
HERE**



**Auckland
Founda+ion**

MOMENTUM
WAIKATO
Te Puawaitanga o Waikato



clutha
FOUNDATION



**CHRISTCHURCH
FOUNDATION**



Check out stories from our members in the sections following.

“Our work is all about building stronger communities and our 17 membership organisations are all actively doing this in innovative ways, in partnership with generous locals and community and charity leaders. It is such a privilege to support the great mahi going on in communities nationwide - hei whakakaha i ngā hāpori o Aotearoa,”

- Eleanor Cater, Membership Services Director



Our Founding Ambassadors

Our founding Ambassadors Sir Stephen Tindall, Neil Craig and Bill Holland share their commitment to the concept of community foundations, featured in Air New Zealand's *Kia Ora* Magazine in September.

The founders of a network

Kia Ora Magazine Story - September 2022

Communities around Aotearoa NZ are set to benefit from the investments of \$750 million over the coming years, thanks to the recent growth of community foundations in New Zealand.

Almost 20 years ago, Sir Stephen Tindall and his friend from college days, Bill Holland, discovered a new way of giving that was gaining real momentum in North America. Bill travelled to the States to take a look at the model of 'community foundations' which were building new community assets, mostly from local generosity.

"It's a simple idea really," says Bill. "The foundations receive donations from individuals, often in the form of bequests, pool them, invest them together and give the income back to communities. For individuals, you can direct your donations to areas of your interest - it can be a bit like having your own trust, without all the hassle".

As a lawyer who often talked with clients about philanthropy as part of the estate planning process, Bill could see wide potential. He was convinced this was a good idea for New Zealanders, who often wanted to give to something that they care about but, says Bill, "couldn't find an easy vehicle to do this, without the big fees".

"Stephen and I both thought the idea had real potential for NZ. I then brought up the subject with my neighbour, Neil Craig (from Craigs Investment Partners). He was on board from the start and that is where The Acorn Foundation, based in the Western Bay of Plenty, was born."

The Acorn Foundation was established in 2003 and Bill chaired the Foundation for its first 8 years, with The Tindall Foundation and Craigs Investment Partners

both providing seed funding to get it off the ground. The foundation steadily grew, and today is self-sufficient and manages an investment portfolio of over \$60m, and all from local generosity. "But what you see only tells a small part of the story: Acorn Foundation actually has hundreds of millions of dollars in a pipeline of bequests, all pledged to be gifted for the future of the region," says Bill.

Since the establishment of Acorn Foundation in 2003, and the earlier establishment of a similar foundation in Wellington (now known as Nikau Foundation), a further 15 community foundations have been launched, today covering almost all of New Zealand. While a young network, between the 17 Foundations they already have \$230m in investments and have distributed more than \$50m in the past 5 years alone.

However, says Bill, that is just the beginning. "We talk about the network as being a bit like an iceberg, what you see on the surface is only a small part of what is going on. There is at least \$520m in the pipeline of bequests - adding up to a network worth at least \$750m. And all from local generosity".

It's been a quiet success story, in part, Bill says, because much of the work going on behind the scenes hasn't come to reality yet. But as a lawyer he knows that, while they take a while to come to fruition, bequests are real. "Some of them are very substantial, and many often are larger - sometimes much larger - than what we expect. And the great part is that Kiwis love this strategic way of giving to their communities, and often they make their giving really personal, going towards something that has touched their heart and souls".

Sir Stephen Tindall says that he is proud of The Tindall Foundation's investment over 20 years and the success of the community foundations' network.



“What I love about it is that it’s a community-centric model, authentically about community and the future local people want to create. And it’s not a concept just for the wealthy. We find that people, from all walks of life, leave legacies to be cared for by their local community foundation, forever” - Sir Stephen Tindall.

The Tindall Foundation was a founding partner of CFANZ and donates approximately \$1 million per year to communities through the community foundation model. This includes the Milestone Development Programme, which has helped to seed fund new community foundations in areas where one has not already been established.

One aim for The Tindall Foundation is to grow generosity across Aotearoa New Zealand and the establishment of a national network of community foundations has been integral to achieving that. CFANZ and The Tindall Foundation have a shared vision of growing local generosity and the model provides a structure for anyone to be philanthropic, and to affect change in their community.

“Community foundations fit well within The Tindall Foundation’s principles, not only growing generosity, but also understanding that local solutions are usually best, because locals know their communities,” says Sir Stephen.

Neil Craig says he is also proud of his early investment in the concept. “I thought it was a brilliant idea right from the outset. Community foundations are an easy way for locals to invest in the future of their communities. And they are not-for-profit, so we know that they really do maximise returns to community”.

In recent years, as community foundations have quietly grown and become an integral part of communities, it’s their community insight that really captures Neil Craigs’ interest. As well as building their own community fund with Acorn Foundation, Craigs Investment Partners also channels all of their Christmas giving through the New Zealand-wide network. “Our local offices work with the local community foundations to work out where our donations will be best put to use. Their community insight is invaluable to helping us know where our donations will have the biggest impact,” said Neil.

One of the most rewarding initiatives Craigs has adopted through community foundations is their Workplace Giving Programme. “We saw the benefit of building our own community endowment fund through community foundations, which provides a very simple way for our employees to donate money to their own communities. We have close to 50% of our 650 staff participating and have distributed nearly half a million dollars over the past three years to local communities through this programme”.

“The benefit of community foundations is that they have local knowledge and people on the ground, they know who is doing great work and advise what causes and charities to invest in for maximum impact. This is a real value-add to us, and has made our community giving so much sharper in recent years.”

“As a corporate it’s really hard to give well! Community foundations make it easy and fulfilling. It’s a new way to give, for corporates as well as individuals.”

Story and interview by Eleanor Cater

Our Strategy

CFANZ is the national body for our 17 community foundation members, our responsibility is to serve their success through providing leadership, building awareness, keeping the network connected, enhancing practices and maintaining standards.

Our collective mission together, which honestly does get us up in the morning with a spring in our step, is *'strengthening communities across Aotearoa NZ.'*

Over the past year we've had specific focus in the areas of:

- brand awareness including our September Wills Months campaign in partnership with TVNZ
- a focus on building national partners which saw Fonterra join our founding partners the Tindall Foundation and Craigs Investment Partners
- the piloting of our national standards attestation programme.

CFANZ has better defined its national growth strategy with current establishment work for a new community foundation underway in Southland, one of only three regions in NZ not to have a local community foundation. Further to our responsible investment commitments we are delighted to be growing our knowledge and capability in better aligning generosity and community impact to the UN Sustainable Development Goals.

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 which enables Kiwis to give for the long term.

Here's how the invested endowment model works:



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.

Our Values

Generosity

Respect

Impact

Innovation

Service to members

Inclusiveness

Our strategic partners



In December, we extended a warm welcome to Fonterra Co-operative Group, who have joined our strategic partnership whānau. Fonterra's philosophy around 'doing good together' in communities, aligns closely with CFANZ's - we know there is so much good we can do, together!

Fonterra
**Doing
Good
Together**

“Fonterra is pleased to partner with Community Foundations of Aotearoa NZ. We see an opportunity to grow our impact in regional New Zealand communities and work collectively to keep our communities strong”

- Mike Cronin, Managing Director of Co-operative Affairs at Fonterra.

The partnership between Community Foundations of Aotearoa New Zealand (CFANZ) and our three national partners, Craigs Investment Partners, The Tindall Foundation and Fonterra, holds immense value for strengthening New Zealand communities. Community foundations play a crucial role in fostering philanthropy and social investment at the grassroots level, and it's our national partnerships which aid to significantly amplify impact and achieve our goals more effectively.

Our founding partnership with Craigs, a leading regional NZ investment firm, brings financial expertise generosity, and resources to the table. This support helps in building sustainable and responsible funding streams for our members community projects.

The Tindall Foundation, contributes its experience in community development and capacity building. Through this relationship CFANZ gains access to valuable insights, best practices, networks, and enabling us to respond to local communities more effectively.

Teaming up with Fonterra, New Zealand's largest dairy cooperative, offers unique opportunities to address social issues in rural areas. With Fonterra's expertise in agriculture and its widespread presence in rural communities, CFANZ can implement projects that promote sustainable development, education, and greener philanthropy in the regions.

Collectively, this partnership facilitates a comprehensive and holistic approach to strengthening NZ community. The blend of financial support, philanthropic experience, and industry-specific knowledge empowers CFANZ to make a meaningful difference in the lives of individuals and communities across the country. By working together, CFANZ, Craigs, The Tindall Foundation, and Fonterra exemplify how collaboration between private, philanthropic, and corporate sectors can create a positive and lasting impact on society.



Our year 2022-2023

Our successes

The Governor-General, the Right Honourable Dame Cindy Kiro, being appointed as our national CFANZ Patron and hosting an event for our network at Government House, Wellington.

Expanding our Ambassador programme and welcoming on board Miriama Kamo.

Fonterra joining our national partners programme, alongside The Tindall Foundation and Craigs Investment Partners.

National partners Tindall, Fonterra and Craigs all contributing significantly to the Cyclone Gabrielle disaster relief via local community foundations.

Partnering with the US-based Mott Foundation to secure investment in progressing the a UN Sustainable Development Goals framework across the network.

Featuring community foundations in national media stories and on TVNZ's Seven Sharp.

Our activities

- National conference staged in May, with 100% membership participation and 100% 'excellent' or 'very good' rating.
- Over 55% of member foundations completing Te Tiriti workshops, and 76% tikanga and te reo workshops.
- Supporting the collective growth across the network in endowments, new funds established, pass-through funds, trust transfers, and total grants distributions to community.
- Securing 200+ TVNZ advertising slots for September Wills Month campaign.
- Producing CFANZ's first Impact Report.
- Progressing establishment work for Southland Community Foundation, including securing \$100k establishment funding.
- Developing a new digital marketing strategy partnership with Wellington's Aro Digital.
- Completing national benchmarking awareness research in partnership with Research First.
- Piloting our National Standards Programme with Advance Ashburton Community Foundation and Nikau Foundation, with both community foundations achieving accreditation.
- Presentations at the Community Foundations of Australia national forum in Geelong.
- Winston Churchill Fellowship research project awarded to our Membership Services Director to research initiatives which have grown community philanthropy internationally.
- Facilitating three strategy formation workshops with local community foundations.

Our network growth



Statement of Financial Performance

Community Foundations of New Zealand Incorporated For the year ended 31 March 2023

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

Revenue	2023
Donations, fundraising and other similar revenue:*	376,923
Fees, subscriptions and other revenue (including donations) from members:*	78,251
Revenue from providing goods or services:*	0
Interest, dividends and other investment revenue:*	1,617
Other revenue:	0
Total revenue:	456,791
Expenses	
Expenses related to public fundraising:*	0
Volunteer and employee related payments:*	206,425
Expenses related to providing goods and services:*	61,784
Grants and donations made:*	60,000
Other expenses:*	107,434
Total expenses:	435,643
Surplus/deficit:	21,148

Statement of Financial Position

Community Foundations of New Zealand Incorporated As at 31 March 2023

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

Current Assets

Bank accounts and cash:*	248,217
Debtors and prepayments:*	2,071
Inventory/inventories:*	0
Other current assets:*	54,720
Total current assets:	305,008

Non Current Assets

Property, plant and equipment:*	1,454
Investments:*	0
Other non-current assets:*	0
Total non-current assets:	1,454
Total assets:	306,462

Liabilities

Total current liabilities:*	72,776
Total non-current liabilities:*	0
Total liabilities:	72,776

Assets less liabilities

Total assets less total liabilities:	233,686
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Our Year 2022-2023



“A highlight of our year for me was, at the invitation of The Right Honourable Dame Cindy Kiro, bringing our community foundations, donors, trustees and volunteers together in Wellington at Government House for a celebration of community philanthropy.

We are proud to work in partnership with our 17 member foundations and our national partners The Tindall Foundation, Craigs Investment Partners and Fonterra, growing philanthropy and strengthening local community funding.”

Arron Perriam, Executive Director



The audience listens to the giving story of donor Nathan Fa'avae 'Celebrating Community Philanthropy' event at Government House, March 3rd 2023.



Kaumatua Joe Harawira listens as Her Excellency speaks, Government House Wellington, March 2nd 2023

Celebrating community philanthropy

On March 3rd 2023, at Government House in Wellington, we held an event ‘Celebrating Community Philanthropy’, together with our Patron, Rt Hon. Dame Cindy Kiro, our 17 member foundations, donors, community representatives, partners and supporters.

Her Excellency’s speech, ‘Celebrating Community Philanthropy, Government House, March 3rd 2023

Rau rangatira mā, e huihui nei, tēnei aku mihi nui ki a koutou. Nau mai haere mai ki Te Whare Kawana o Te Whanganui-a-Tara. Kia ora tātou katoa.

It’s my great pleasure to welcome you all to Government House Wellington this evening. I’d like to specifically acknowledge: Raymond Key, Board Chair of Community Foundations of Aotearoa New Zealand; Lori Luke, Deputy Chair; Ranei Wineera-Parai, Trustee; Dr Taku Parai, Kaumatua; Arron Perriam, Executive Director; Eleanor Cater, Membership Director.

I also wish to acknowledge Amy Bowkett, Executive Officer of the Hawkes Bay Foundation, and your husband Richard, who I understand to have lost your home in Cyclone Gabrielle. Our thoughts are with you and your

community at this extraordinarily difficult time. It is a testament to your own commitment to the work of the Hawkes Bay Foundation that you are with us here this evening.

As patron of Community Foundations, I’m glad to have this opportunity to acknowledge the work that you do to support New Zealanders and communities across the country.

I’d like to begin by specifically acknowledging the recent work you’ve done in response to the recent weather events through your emergency response funds.

Your core ethos of ‘effective funding’ has meant that those countless New Zealanders – seeing the devastation of the cyclone, and wishing to help – have been able to donate in a way that can be of greatest service, both in the short-term response, and the long-term recovery.

In the face of such tragedy and loss, New Zealanders’ huge outpouring of solidarity and support is a heartening

reminder of the essentially good and charitable spirit that underpins our society. This is something we can all be very proud of.

I was interested to read Eleanor's recent article in LawTalk. In it, you made the point that there seems to be something in the New Zealand psyche that means we tend to avoid conversations about money, death, and philanthropy. You also quoted the research that said the main reason people don't leave a bequest to charity in their will is because they didn't know it was an option.

Through the work of community foundations, you are helping more and more New Zealanders become aware of the possibility of giving – both in their own lifetimes and beyond. Not only that, but through your own carefully managed pooled funds, you help to increase the reach of those New Zealanders' generosity – helping it to endure for generations.

I was very moved to read the story of Peter and Nellie McNab – who we have with us here tonight. I understand that, following the death of your son Baden, you decided that a fund in Baden's honour, giving back to those things he loved, would be a fitting legacy for his life: one that would have an enduring and positive impact on the Clutha community. I wish to commend you both for your great courage and generosity – and I know there are others with similarly remarkable stories here this evening.

This leads to another reason community foundations work so well: because of the fundamentally community-based aspect of your model. Your advisors are part of your respective communities; you understand the particular challenges your communities face, and know where funding should be directed to achieve the greatest possible good.



CFANZ Ambassador Miriama Kamo speaks of the "time, talents and taonga" of those present

St Francis of Assisi said: 'Remember that when you leave this earth, you can take with you nothing that you have received – only what you have given': words that seem to me to underpin the work and ethos of Community Foundations.

My sincere thanks, once again, for all that you do to support philanthropy in New Zealand – through both helping us to donate as best we can, and helping those in our communities who need it most.

Kia ora huihui tātou katoa.



CFANZ Board Chair Raymond Key meets Her Excellency, Dame Cindy Kiro, Government House Wellington, March 3rd 2023.



Big dreams can happen campaign launched.

Our central campaign message: “Whatever it is you want for your community, your big dream can happen, through your local community foundation”.

In August we launched our ‘Big Dreams Can Happen’ campaign, a culmination of 2 years of creative work - disrupted by a pandemic - which finally came to fruition.

“This campaign came about from the idea that community foundations can be the perfect vehicle for local people to activate their legacy, to make their big dreams happen” said CFANZ Membership Director, Eleanor Cater.

“The concept really grew from what we hear from donors and some of the latest trends we see in the world of philanthropy: donors are getting more thoughtful in their giving, gifts in Wills are on the rise, donors want to see their gifts have real impact. In particular, named funds or invested endowment funds are growing in interest as Kiwis come to see their long-term strategic opportunity to affect the change that they want to see in the world.”

Consider your big dream – what changes would you like to see for your local community? You can make it happen, with donations big and small, or perhaps through a gift in your Will, through your local community foundation.

See our campaign video, featuring our Ambassadors Sir Stephen Tindall and Miriama Kamo - and superstar Leni! - here - <https://www.youtube.com/watch?v=lQUXPI-iG08>

Thank you for supporting our mahi for September Wills Month 2022: TVNZ, Sky TV, Air New Zealand and Kia Ora magazine, The NZ Law Society, our strategic partners The Tindall Foundation, Craigs Investment Partners and Philanthropy NZ, and our Ambassadors Sir Stephen Tindall, Miriama Kamo and our 8-year-old superstar Leni, for fronting our ‘Big dreams can happen’ campaign. Ngā mihi nui.

Images from our national conference.

In May, we were delighted to finally bring together our network - after 2 false starts - for our national conference in Wellington. The 2022 conference had a focus on reconnecting, strengthening our foundations and inspiring new community philanthropy for the future.



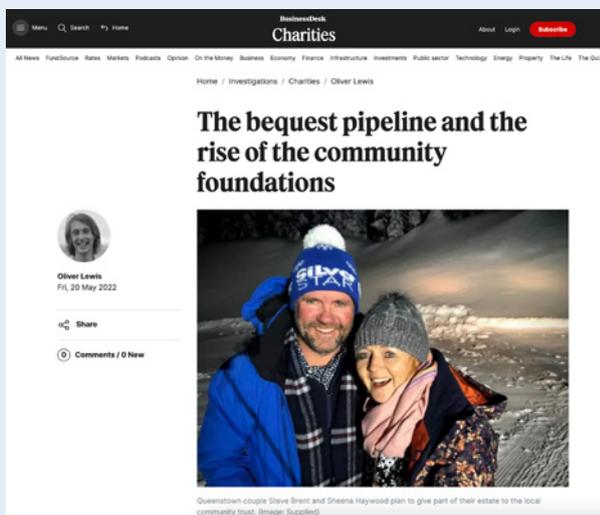
Clockwise (from top left): 1. Kelvyn Eglinton, CEO of Momentum Waikato Community Foundation greets Cyril Howard from The Tindall Foundation. 2. Minister Hon. Priyanca Radhakrishnan opens the 2022 conference 3. Margot McCool from Acorn Foundation presents Acorn's Youth Vital Signs Report 4. Dame Fran Wilde, Chair of Nikau Foundation chats with Bryce Barnett, Chair of Taranaki Foundation at the conference dinner.



Clockwise (from top left) 1. Em Lewis, Nikau Foundation 2. Conference delegates listen to Jehan Casinader 3. Rosemary Sloman, Eastern Bay Community Foundation with Melody Mobsby, Auckland Foundation and Raymond Key, CFANZ Board Chair 4. Nicola Hartwell and Sophie Lane from Northland Community Foundation 5. Jennifer Belmont from Wakatipu Community Foundation 6. Jehan Casinader speaks on 'Leading with Stories' 7. Kenneth Leong from Auckland Foundation.

Community Foundations in the news!

2022-23 has also seen some big news stories about community foundations as media and thought leaders across Aotearoa NZ come to understand community foundations and their potential in communities.

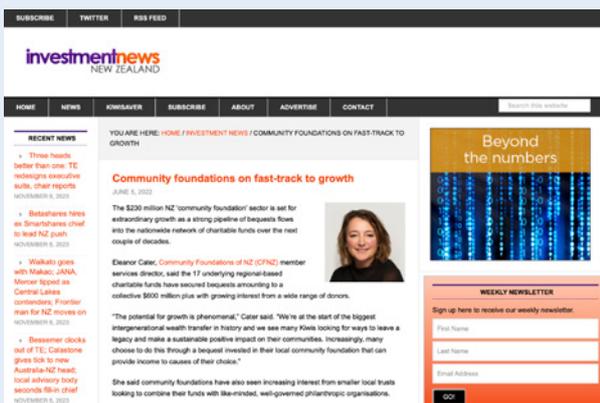


Business Desk

BusinessDesk began our coverage in May with this news article, 'The bequest pipeline and the rise of the community foundations':

"Kiwis are discovering a new way to give, read all about the rise of community foundations"

→ <https://businessdesk.co.nz/article/charities/the-bequest-pipeline-and-the-rise-of-the-community-foundations>



Investment News

In June, community foundations and their growth potential were also featured in Investment News. 'Community foundations on fast-track to growth' acknowledges that, through our invested model, increasingly communities are growing their philanthropic assets through local generosity. Read the article here

→ <http://investmentnews.co.nz/investment-news/community-foundations-on-fast-track-to-growth/>

Community foundations were also featured in **Philanthropy New Zealand's magazine**, in this thought piece by Sir Stephen Tindall - "The movement called "Community Foundations of Aotearoa New Zealand" is providing a fabulous way for people, even with a small amount of surplus funds, to contribute to their local communities." Read the article here

→ <https://tindall.org.nz/a-qa-with-on-philanthropic-leadership/>



Lawtalk

In September, philanthropy as a conversation was featured in Lawtalk, the NZ Law Society’s magazine. This article focused on meaningful conversations about philanthropy, helping lawyers to advise their clients on their options for giving - including through community foundations,

Read the article here

➔ <https://www.lawsociety.org.nz/news/publications/lawtalk/lawtalk-issue-951/>



Seven Sharp

In September community foundations were also featured on TVNZ’s Seven Sharp, when Executive Director, Arron Perriam, was interviewed about the opportunity for anyone to leave a legacy to their local community.

Kia Ora Magazine

Also in September, the story of the founders of community foundations was featured in Air New Zealand’s Kia Ora magazine - the quiet growth of a \$750m network (read the Kia Ora article on pages 8-9).



The CFANZ team and Community Foundations Australia board (from left) Jeremy Stewart (Albany Community Foundation), Gerlinde Scholz (CFA), Tae Wood (CFA), Loredana Fyffe (partly obscured, CFA), Maree Sidey (CFA), Eleanor Cater (CFANZ), Ben Rodgers (CFA Chair), Arron Perriam (CFANZ), in Melbourne, October 2022.



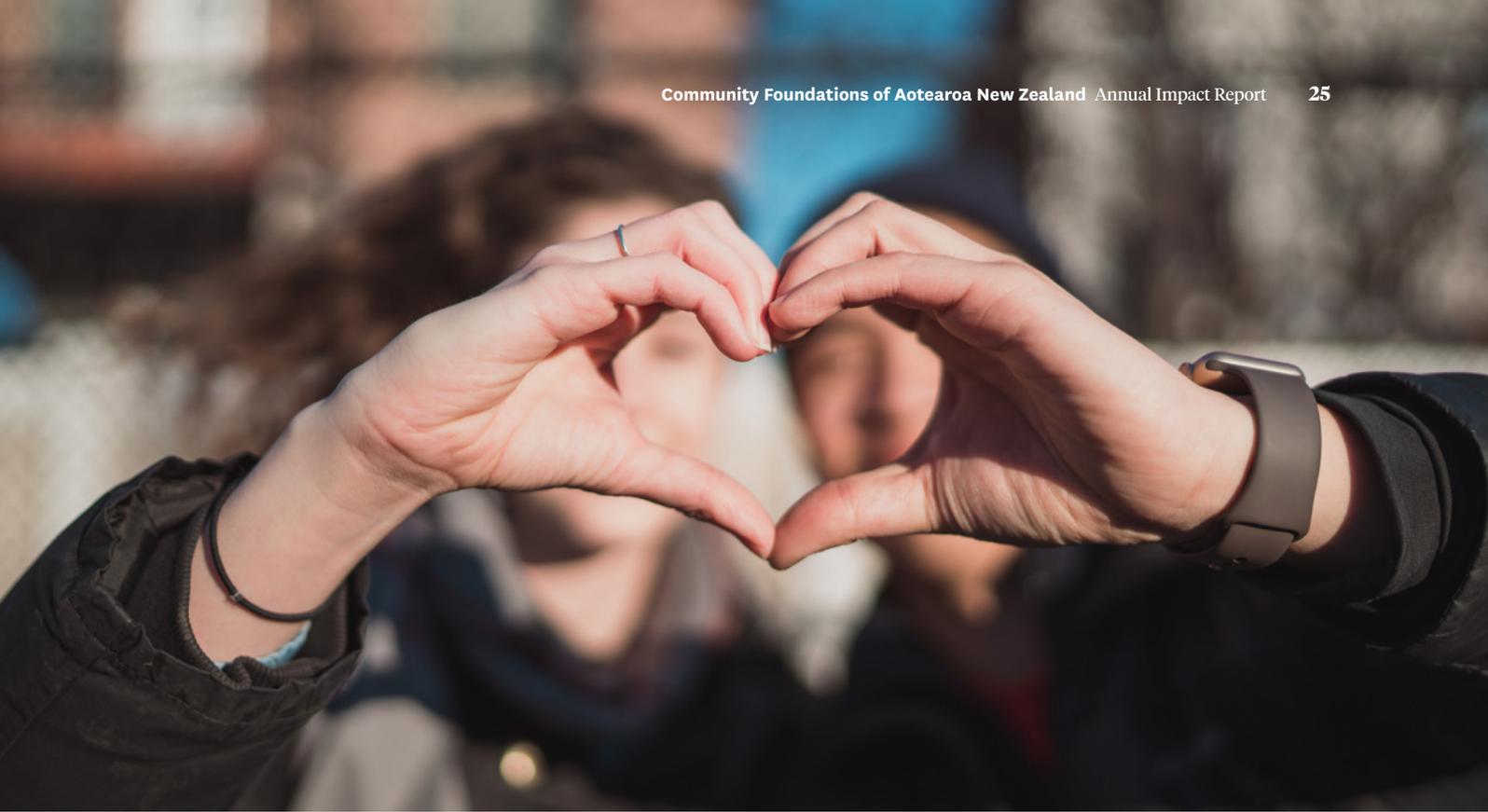
Together

International collaborations

Our ties are close with our international networks and knowledge transfer is a key part of community foundation collaborations internationally.

Our management team attended the Community Foundations of Australia Forum, in Geelong, in October 2022, with Arron Perriam speaking on leadership and Eleanor Cater leading a session on stewarding the intergenerational wealth transfer for the benefit of community.

Our team also spent a day with the Community Foundations of Australia Board, forging closer ties and collaboration for the future. Further international collaboration is already taking place throughout 2023 with our Australian, Canadian, UK and US networks.



Community philanthropy, what is it and where is it going?

First of all, what is community philanthropy?

It's a good question! Philanthropy means so many different things in different contexts and is even used in NZ to simply mean 'funding' into communities. Philanthropy's generally accepted international definition is 'private action for public good', but you won't find that in the dictionary (you'll more likely get the definition of "for the love of humanity"). Community philanthropy is private action for local community impact, which leads to communities forging their own futures through self-determination.

What are the biggest trends CFANZ has observed in the NZ philanthropy sector over the last few years?

We are noticing more of an interest from Kiwis in funding social change and climate solutions. Kiwis really want to make a difference and can find it's really hard to give well into communities, understanding who is doing great work and where their donations will make the biggest impact. The immense value-add of the local community

foundation is to help locals to give most effectively into communities.

What are the biggest trends observed by international community foundations over the last few years?

Internationally, collectivism of giving really seems to be engaging people. Community foundations are really coming into their own, enabling people to feel like they can be a part of something bigger than themselves and that they can, individually, can play their part in creating the future for their communities. Post pandemic, people want to know how to make a difference, how to shift the dial and how they can give well. People really like the idea of funding well into communities and are seeking out specialist philanthropy advice, including the wide range of impactful, and more fulfilling, ways that they can give. Internationally there is a real shift going on and community foundations are stepping into becoming real connectors and drivers for transformational community change.

What are the biggest opportunities to create a transformative impact in our communities in future?

The NZD\$1.25T intergenerational wealth transfer from the baby boomers, which is starting to happen now, is a one-off chance for communities to reimagine their own futures over the next 20 years. Community foundations provide the structure for locals to be a part of future community transformation and, with their 'finger on the pulse' of communities can provide the leadership to help to steer local philanthropy towards hard to fund into areas, such as research, advocacy, climate change and funding for equity.

What are the biggest opportunities for donors to make a transformative impact in our communities by partnering with community foundations?

Donors can leverage the knowledge that community foundations have, utilizing data and insight, to really make a difference. They can also set up a unique way to give which will enable them to give back for the long term - beyond their lifetime and even in perpetuity - within a structure that has been proven to endure for the long term. Kiwis are discovering that this is really effective and transformative giving, both for communities and, interestingly, for the donors themselves. The experience of giving well into communities changes people.

What is the collective impact NZ community foundations have made in 2023?

Ah the 'impact' question. This is where we trot out the numbers, even though it is so much more than this! Collectively, as a network of 17 foundations, we have given out over 1,510 grants and over \$19m in the past year alone. However, some of the most impactful things we do are immeasurable, such as supporting community mana and self-determination. Dollars and cents don't measure the confidence instilled in an educational scholarship, the relief that comes from food security, the mana that comes from digital equity. The impact is immense in the stories that we hear every day and our mission is to inspire even more Kiwis to discover the personal impact that they can individually make, to really shift the dial in communities.

What is next up for Community Foundations of Aotearoa NZ?

We exist at CFANZ as the connector of the network to support growth and collective impact. Upcoming for 2023/24 are some key projects including aligning our



work with the UN Sustainable Development Goals, and upskilling professional advisors so they have a toolkit for initiating conversations in philanthropy. Our key goals include creating a positive environment for philanthropy to thrive and the infrastructure to make it easy for kiwis to jump on board and discover the joys of philanthropy and the fulfillment it can bring to their lives, and, to this end, we have a new community foundation launching in Southland in 2024 (we haven't had one launch since 2019, so an exciting milestone for the network!) All indicators are that the future of community foundations in Aotearoa NZ is exciting as they continue to grow in their scale and their collaborations, leading more funding into communities and greater community impact. It is our honour and our privilege to play a small part as convenors and connectors on this journey.

Eleanor Cater, Membership Services Director 2023

Aligning the mahi of community foundations with the UN Sustainable Development Goals

Community Foundations of Aotearoa NZ has recently partnered with the US-based Mott Foundation, embarking on a journey of aligning our changemaking community work with the UN Sustainable Development Goals (UN SDGs). At CFANZ we have been thinking deeply about what it means to take local action towards supporting global goals, and particularly as they contribute to the bigger international picture of what sustainable development looks like in a rapidly changing world.

In the pages following we have selected some stories of local action and local impact, along with their alignment with the UN SDGs. We hope that this provides some context of how local action can contribute to global goals.

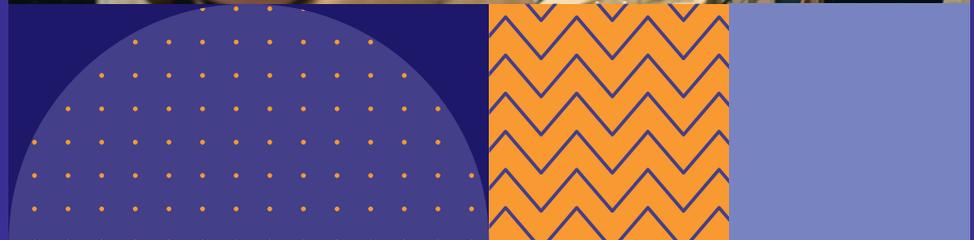
SUSTAINABLE DEVELOPMENT GOALS



Funds which are building community



Community



Emergency Funds responding to climate change events

Increasingly, community foundations across Aotearoa NZ are finding themselves preparing for, and responding to, community crises. No time has this been more apparent than when Cyclone Gabrielle launched her wrath upon the North Island in February 2023.

Community foundations can play a central role in communities at times of disaster. Initially, they can help with disaster-response and they step in to help the community recover for the long-term.

Effective funding is what community foundations do. They have deep roots into communities, they have the

knowledge and expertise to respond. They are on the ground and nimble, able to get funding to where it is needed. They operate a low-cost structure which sees maximum funds going into communities, distributing to those on the ground doing the crucial work.

In response to this one climate-related event four community foundations set up relief funds, including in Northland, Auckland, Hawke's Bay and Gisborne-Tairāwhiti. These funds have collected donations and distributed millions of dollars into local communities, getting funding to where it is needed most.

A heartfelt thank you to community foundations who have acted as community leaders and to all who have donated to local funds, including our national partners The Tindall Foundation, Craigs Investment Partners and Fonterra, to get their donations to where they were needed most during the devastating weather events of early 2023. You are helping us build community resilience, ngā mihi nui.



Porangahau Marae volunteers assess the damage.

Fund established by the Taupō Budget Advisory Service



Local individuals and families will benefit from the new fund established by the Taupō Budget Advisory Service, being managed by Geysler Community Foundation.

Chair of the Taupō Budget Advisory Service, Doreen Blyth, says the endowment fund was part of the organisation's long-term funding strategy for a stronger and more sustainable future.

"There is just not enough money to cover running costs and we are always grateful for the support of the local community. Establishing a fund with the Geysler Community Foundation provides a powerful way for all of our supporters, including former clients, to make contributions as well as bequests in their wills".

Donations made to the fund will be managed by Geysler Community Foundation, and the capital retained forever. "Once our fund reaches its investment target, the interest earned will benefit the service year on year, forever. "The money will be used where it is most needed to keep the service running."

Geysler's Chair, Helene Phillips congratulated the Taupō Budget Advisory Service for choosing to establish a professionally managed endowment fund with the Foundation, saying "The perpetuity model ensures a sustainable income stream meaning the fund will return far more to the service over time than a one-off donation. People who want to help the service assist others will appreciate being given another, more strategic option for supporting this important local community service. Over time the fund will strengthen Taupō Budget Advisory Service and enable trustees and staff to spend more of their energy on their core business and less on fundraising".



Gisborne Suicide Prevention Fund launched in memoriam



The unexpected loss of a friend prompted Derek and Rebecca Watson of Ritchie Civil to establish a Suicide Prevention Fund through The Sunrise Foundation in Gisborne.

Mates of Tairāwhiti (MOT) helped Ritchie Civil with the loss of their work colleague and introduced the couple to the concept of creating a memorial fund, as they wanted to try and make a difference, in his memory.

The day they heard the news, is one that the couple will never forget. “The loss has had a widespread effect on everyone. Derek and I are still finding it really tough, his work mates are still struggling and of course the impact on his whanau and friends”, said Rebecca.

Rebecca and Derek decided to establish the Suicide Prevention fund at Sunrise because “Sunrise is amazing in

what it does, it’s got some really good publicity behind it, it’s there to make a difference and it’s local”.

“Gisborne is so different to anywhere in the whole of NZ really. People think differently and interact differently, we say it as we mean it. We’ve got our own mana, we don’t need it from anywhere else. Sunrise Foundation is ours for Tairāwhiti. We can trust it’s for our region and we aren’t dictated to by outside people.”

“We went with Sunrise because the granting is non-political. Sunrise has people with a range of different strengths and knowledge they bring to it. Every year the grants will be based on the applications that come in and the money given to the organisations working in the suicide prevention space that are making the biggest impact each and every year, forever.”

Derek and Rebecca Watson, with the team from Ritchie Civil, hope that if people can’t afford to give to the new Suicide Prevention fund at Sunrise now, that they might consider doing so through a gift in their Will.



The Ritchie Civil team in Gisborne are honouring the memory of a colleague through their Suicide Prevention Fund with Sunrise Foundation

Green Philanthropy Fund in Ōtautahi - Christchurch



One of The Christchurch Foundation's goals is to make it easier for businesses and individuals to give to the natural environment, and to increase the pool of funding available to those individuals and groups striving to improve and protect local ecosystems.

CEO Amy Carter says, "Canterbury's unique landscapes are something to treasure. We know that Cantabrians, both urban and rural, are passionate about our whenua (land), awa (water) and rerenga rauropi (biodiversity). As we look to the future, ensuring our ecosystems thrive is critically important".

The Green Philanthropy Fund will support:

- Projects that will make a proven ecological impact.
- Innovative ideas that could be game changing, on farms or elsewhere
- Individuals and organisations leading ecological support and recovery.

The fund is backed by a partnership with Environment Canterbury, and a long-term commitment to support evidence-based projects and organisations across all ecosystems in Waitaha Canterbury.

"Eighty per cent of funds raised annually will be distributed the following year, with the other 20 per cent used to build an endowment fund. These funds will be invested with some of the income distributed annually and the remainder reinvested", said Ms Carter.

A panel of technical experts from across Waitaha Canterbury will advise the Foundation on what projects and organisations to back and donations can be made via The Christchurch Foundation's website.



**CHRISTCHURCH
FOUNDATION**

Local action on maternal mental health



Thanks to the generosity of women around the Eastern Bay of Plenty (EBOP), Whanau Awhina Plunket EBOP have been voted as the recipients of the inaugural Impact100 Fund, run through Eastern Bay Community Foundation.

The Plunket project, which was presented for the consideration of local donors, involves targeted support for high-risk and new mums throughout the Eastern Bay, connecting and supporting these women through a difficult time. COVID restrictions, economic circumstances, rural and ethnic isolation have all contributed to the high levels of concern around maternal mental health in the region, and this project aims to inject some early intervention and provide much-needed connection for local mums and their babies.

“Our heartfelt thanks to our very generous donors for making this possible”, said Rosemary Sloman, Executive Officer of Eastern Bay Community Foundation. “Impact100 donors are thrilled to be making a difference where it matters most.”.



Trustees of Eastern Bay Community Foundation Viv Barr (far left) and Robyn Woolsley (far right) present the Impact100 donation to local Plunket representatives

New Fund established by the Taupō School of Music



Local children will benefit from the new fund established by the Taupō School of Music with the Geyser Community Foundation.

Chair of the Music School's Board of Trustees, Tracey Lidington said the endowment fund was part of the School's long term funding strategy. "Donations made to the Fund will be managed and invested by the Geyser Community Foundation on behalf of the Taupō School of Music and the capital retained forever. It provides a special and powerful way for trustees, tutors, students, supporters and members of the public to make contributions, including bequests and endowment in wills at any time. Once our Fund reaches its investment target, the interest earned will benefit the School year on year, forever".

Established in 1989, the Taupō School of Music provides a great opportunity for children to learn about music.

"Children love music and there is now considerable research linking our academic and all-round success as human beings to learning to play a musical instrument and being involved in musical activities as a child. We provide affordable lessons with tutors who inspire our young people to be the best that they can be."

Ms Lidington said the annual income could be used in a number of ways for the benefit of students such as providing scholarships and prizes for outstanding achievement, providing or improving resources such as instruments and other facilities at the Music School.

"We are hoping local people will jump on board and help us by making donations to the new Fund."

Geyser's Chair, Helene Phillips said the Foundation was honoured to have been chosen by the Taupō School of Music to manage the Fund in perpetuity.



Students and teachers at the Taupō School of Music, benefitting from a new fund invested with Geyser Community Foundation

Growing an Arts Fund for Ashburton



Over 50 years, Braided Rivers Community Trust (formerly Ashburton Licensing Trust) purchased Art which was displayed in the properties they owned. Recently, the Board formally gifted some paintings to the Ashburton Art Gallery, with the remainder going to Advance Ashburton Community Foundation.

Advance Ashburton decided to grow the Ashburton Arts Fund by holding an Art Auction featuring the paintings from the collection and other works donated by the community, including over 20 which have been donated by generous local Merle Cooney. The Fund will be managed in perpetuity by Advance Ashburton, with the income generated by the Fund distributed to support art and artists in the Ashburton district.

The Art Auction saw over 60 artworks auctioned through this wonderful collaboration between two funders and raised \$38k for the Ashburton Arts Fund.



Donated art works for the Art Auction by Advance Ashburton Community Foundation

Trust resettlements



Together

Local trust resettled with Wakatipu Community Foundation



The trustees of the Bruce Grant Youth Trust have resettled the trust's funds to the care of Wakatipu Community Foundation, with the trustees continuing to oversee the grants and fundraising. The trust has supported many young adults in Wakatipu to reach their goals, after being established in 1995 following the death of Bruce Grant, who died after summiting K2.

Craig Ferguson, trustee of the Bruce Grant Trust, said "The Wakatipu Community Foundation will ensure that the legacy of Bruce Grant continues and that our goal of supporting our youth's sporting and cultural endeavours will remain a priority."

Increasingly, local trusts are finding community foundations are a sound solution for the future of their trust funds, ensuring that the original purpose continues on in perpetuity.



Jennifer Belmont, CEO of Wakatipu Community Foundation (front), with trustees of the Bruce Grant Memorial Trust, who have resettled trust funds with their local community foundation. Photo Credit: Philip Chandler

Resettling a local arts fund



The Friends of New Plymouth Opera House established a dedicated ‘Named Fund’ with the Taranaki Foundation. The trustees decided to wind up the Trust and transfer the proceeds to the Taranaki Foundation, which will administer the funds as per the Trust wishes going forward and see the funds safeguarded in perpetuity.

Kevin Murphy, who has been a New Plymouth Opera House Friends trustee since its inception, says the new Fund realises the aspirations of its founders.

“The income from the Fund will continue to be distributed according to our wishes for perpetuity, which is most important to us. It is comforting for us to know the Fund will continue to be well-managed and get a better return than our term deposits, which means more support for the community.”

Established in 2007, the Trust’s purpose was to assist in the provision of facilities for recreation and cultural activities, offering financial and other assistance to TSB Showplace, TSB Stadium and Bowl of Brooklands for the benefit of the general public of Taranaki.

This resettlement marks the single largest ‘trust transfer’ to Taranaki Foundation to date and Foundation Chair, Bryce Barnett, said he and the Board were very appreciative and thankful for the trust and confidence the group has placed in us as an organisation.

“Our aim at Taranaki Foundation is to provide local charities with sustainable long-term income through the revenue generated from the investment of funds. It is a privilege to provide this service and continuity for Friends of New Plymouth Opera House and to support them into the future,” Bryce said.

Kevin Murphy agrees the transfer of their Trust to the Foundation was straight forward. The trustees are pleased that the Foundation will continue the good work of the Friends.

“Taranaki Foundation has established itself as a trusted community-connected organisation, supporting the breadth of local activity and the richness of our community. We are pleased to be adding to that wider picture.”



New Plymouth Opera House Treasurer Peter Rothwell, Chair Taranaki Foundation Bryce Barnett, Original Trustee NPOH Bryan Robb, Community Engagement Manager Theresa Cayley and NPOH chairperson Kevin Murphy



Community Foundations and the New Zealand funding landscape

By Eleanor Cater

We often get asked how community funding in Aotearoa NZ works, and it's easy to see why, it's complex. Much of it is regionally based, with a funding landscape comprised of local community trusts and energy trusts (both of which are unique to Aotearoa), private family foundations (such as The Tindall Foundation, Todd Foundation and JR McKenzie Trust), corporate foundations (such as Te Rourou One Aotearoa Foundation and The Spark Foundation), commercial operators (such as Perpetual Guardian and Public Trust), statutory trusts including gaming trusts (such as The Lion Foundation, Pub Charity and NZCT, distributing proceeds from gaming machines), as well as local and central government (including the Lotteries Grants Board and Community Organisation Grants Scheme).

Each of these funders have a different focus, many are regionally focused, and most have specific visions or strategies to achieve change across Aotearoa NZ. They each occupy a specific regional or strategic niche and, increasingly, they collaborate with one another to achieve common aims.

We also have a growing network of 17 local community foundations, which are based on a successful model of place-based philanthropy. So, where do they fit in?

Essentially, community foundations provide the infrastructure for individuals, organisations and businesses to give, to become involved in community funding, to see their vision through for their community. Geographically focused, they provide the means for everyone to be a philanthropist and to hone their giving so that it can be effective and long lasting.

Community foundations pool community funds, invest them and distribute the income into communities,

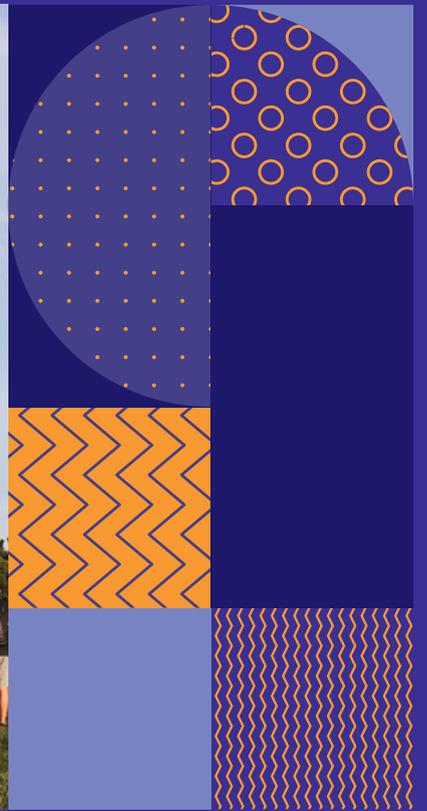
working in partnership with donors and steering funding to where it is needed most (using local insight, data and research to inform that process). They act as connectors on the ground, connecting generous Kiwis with opportunities to do something transformative for their communities - whether it be building long term funding streams, transformative projects or providing emergency funding. Community foundations connect local philanthropy with local needs, using a model that is long-term and sustainable.

Community foundations help Kiwis to do something more strategic beyond traditional charity giving. They are uniquely placed to bring resources, doers, and innovative ideas together to tackle the challenges of our age and, because they work with people who are choosing to give now or have set up a fund to be responsive to local needs, they often don't have the same constraints as other funders. It enables them to be nimble, working in partnership with local givers (and, as Cyclone Gabrielle's recent devastation has demonstrated, the need to be nimble and responsive has never been more important).

Our communities need all kinds of givers, including those who generously give their time and donations to immediate needs and those who are thinking more strategically about shifting the dial, thinking long term and being creative with their giving. For givers of all kinds, the local community foundation may well be a place that they discover the means for giving in a fulfilling way, giving long term, and giving well.

This article does not contain a definitive list of funders and does not include iwi-led organisations or those with a specific focus on Te Ao Māori.

Stories of generosity



Give

Building an intergenerational legacy



Pip Smith is really proud when she talks about her family's philanthropy, having evolved over many years, and shaped by the experiences of herself, her husband Jimmy and daughters Chelsea and Kady.

Describing themselves as 'an average family', Pip says, "We are certainly not wealthy, but we have always made it an important part of our family life to see the struggles of other families and to consider helping where we can."

Pip and Jimmy have structured their wills, so that a portion of their estate will be donated their own fund

managed by Auckland Foundation, supercharging its growth for the future.

"Over the years we've learned more about how to give and being more strategic with our giving with the guidance of Auckland Foundation and the like-minded families and donors we have connected with. We have enjoyed learning through the process, working out how to give well and how to target our donations. Our bequests help to cement our commitment to giving well."



Chelsea and Pip Smith are proud of their family fund, managed through Auckland Foundation, and structured to give back to their community for the long-term, eventually being supercharged through family bequests.

Couple donate entire proceeds from house sale to the Hawke's Bay region



The Bradshaws' gift to the Hawke's Bay Foundation is the largest gift given by a single donor. Photo credit: Tremains

A wonderful story of generosity emerged recently from Hawke's Bay, where a couple who live overseas have decided to create a legacy to continue to give back to their beloved adopted region.

The proceeds from the sale of their Hawke's Bay property have been donated to a fund with Hawke's Bay Foundation and the income from the investment will continue to give to the greatest needs of the region, forever.

The Bradshaws visited Hawke's Bay for several months each year over the past 20 years, and had made enduring Kiwi friendships and quietly contributed to the Hawke's Bay community.

Jules Nowell-Usticke, Hawke's Bay Foundation trustee and a close friend of the Bradshaws, said the couple understood the impact that community foundations can have on their communities from their connections to the Vancouver Foundation.

"By generously leaving this gift to Hawke's Bay Foundation, they know it will hugely benefit many of our own charities for years to come," Nowell-Usticke said.

Hawke's Bay Foundation Executive Officer Amy Bowkett said the donation would be preserved in perpetuity, with the Foundation's Distributions Committee directing the earnings generated each year to the areas of greatest need in Hawke's Bay.

"We're definitely going to miss having Dick and Val visit, but it's so heart-warming knowing that their memory will live on through their generosity towards this community, which they loved dearly".

**LIVE
HERE
GIVE
HERE**



HAWKE'S BAY
FOUNDATION

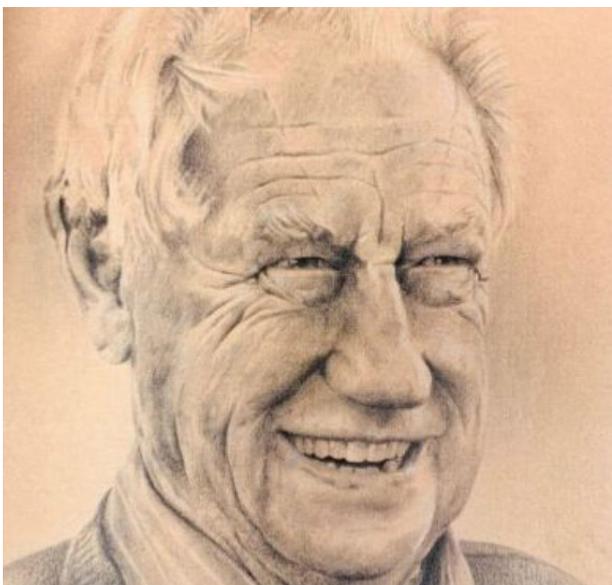
Deep passions and an enduring legacy in the Eastern Bay of Plenty



Dick Anstis, was a man who rolled up his sleeves and got on with the task in hand, whatever was needed to grow his family, and to ensure the community that surrounded them was also in good stead. Dick had strong principles, and values that have endured through his guardianship of the land, and care of, and investment in, the people of Opotiki.

Richard Samuel Anstis QSM (Quite Some Man) was born in August 1922, and died just 25 days short of reaching a century.

Dick was an active serving member of Opotiki Lions, and served as Chair of the Opotiki District Council in the



1970's, all the while farming and raising his family and caring for his ailing wife. Dick had a long involvement with EBOP Alzheimer's, the Historical Society and Hiona-St Stephens Church, Opotiki, where he was the Peoples Warden for many years. His advice was sought after, and his mentorship of younger members of the family and the community was deeply appreciated and acknowledged.

When the Opotiki community sought a subscription to raise sufficient capital to support the vision of aqua farming in the region, he was quick to apply his support to Whakatohea Mussels and Whakatohea Aquaculture. At the time, he wrote: "this is an important cross-cultural endeavour- the community working together - trying to improve its lot in the world and creating opportunities for its young people."

It was the sale of his shares in the aqua-farming venture that has provided for his legacy gift to the community, through Eastern Bay Community Foundation.

Following Dick's passions, The Dick Anstis Family Fund will support:

'Healthy Kids' -promoting healthy lifestyles for kids through nutrition, physical activity and education.

'Youth Development' - providing tools and resources to help young people to become successful in their endeavours , including the arts.

'Connecting Kids / People to Nature' - providing opportunities for discovery and the exploration of nature that will build lifelong conservation values, particularly those seeking careers in farming the land or the ocean.

Dick's fund will support his passions and focus on the projects likely to have the greatest impact, and drive a more meaningful outcomes for Opotiki and the entire Eastern Bay of Plenty region.

What is it like to give through your local Community Foundation?



Community Foundations help local people to give well into their communities, using insight and data to help to guide their giving, and robust systems to take good care of their funds.

Watch our video story with Nathan Fa'avae (from Top of the South Community Foundation) and Barbara Blake (from Wellington's Nikau Foundation), who share why it is so fulfilling to give through their local Community Foundation.

<https://www.youtube.com/watch?v=AeYQ8eD6xuA>

Top of the South Community Foundation donor, Nathan Fa'avae, speaks of the fulfillment he receives through giving through his local community foundation.

\$4.5m gifts a 'game changer' for Top of the South



In 2022, Top of the South Community Foundation received two 'game changing' gifts from a couple who have a sincere desire to support the greatest needs in their community, into the future.

The anonymous couple, who forged their careers overseas and are retiring from Goldman Sachs, have made two gifts to establish an invested endowment fund with their local

community foundation – the first for \$1m to establish the fund and the second for a further \$3.5m.

Their gifts will be invested in perpetuity to support some of the greatest needs in the region, and will continue to give back to their beloved region across the top of the South Island, forever.

Foundation Executive Officer Gavin Larsen said, “These are amazingly generous gifts and will take the Foundation’s community impact to another level. As we all know we are living in challenging times and gifts of this nature will crucially assist at-need areas of our community for the future”.





Investing in a lifetime's love for education

Kate Syme's life's work has focused on the opportunities education can bring across New Zealand. "My experiences in education have made me who I am today, I believe experiences are very powerful."

Kate met her husband Derek (or "Doc") at Teacher's College in Christchurch and they both worked for many years in education, including for a time in Cannons Creek, Porirua. It was here that Kate worked with many children of Pasifika and Māori descent and learned first-hand the barriers they can face to educational opportunities. "We were always very concerned that everyone had a fair go, and found that there was a heck of a lot of children who, in spite of what they do, they don't get equal opportunities in education."

A move to Ashburton followed where Kate and Doc heard about the community foundations model through Advance Ashburton Community Foundation, and started thinking about the legacy they would leave behind in



their community. Sadly, Doc passed away before they had made their final decision. Kate eventually decided to set something up as a legacy that would help "particularly Māori and Pasifika students to succeed."

"I've been influenced by local people who set up scholarships while they are alive, and were able to enjoy the pleasure of seeing how their money was used. Seeing who it went to and, perhaps establishing a relationship with those people, I thought made far more sense than waiting until after you were gone."

The Kate Syme Scholarship will be managed as an invested fund with Advance Ashburton Community Foundation. Annually, it will provide tertiary education opportunities for a student, in the first instance of Māori or Pasifika descent, from Ashburton College.

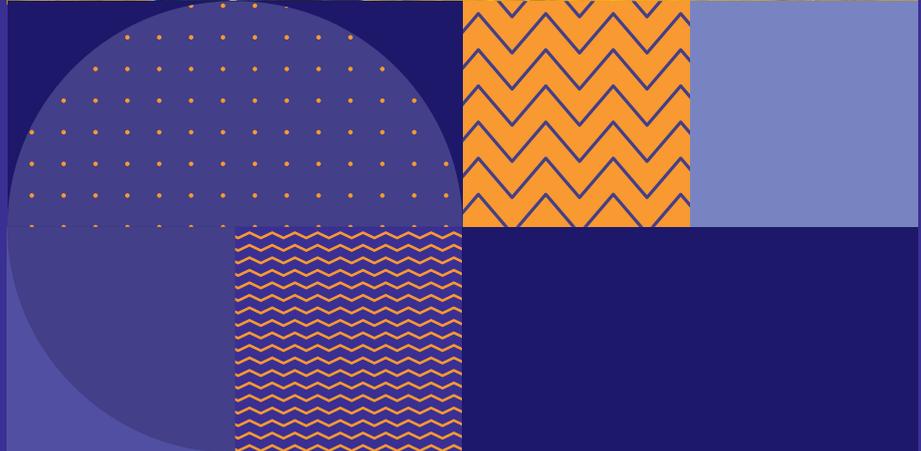
The first scholarship payment is to be made in 2023, and Kate says that the scholarship will be flexible with regards to the subject and recipient.

"If you've got warmth to give, you can share it. I find pleasure in knowing somebody is going to benefit from my giving," said Kate. "I'm particularly happy that I've made the decision to start my fund before I die. I find a sense of excitement with that. Money is nothing unless you can get some enjoyment from it."

Stories of impact



Impact



Supporting the wellbeing of Porirua Youth



“The types of experiences ZEAL creates are life changing for our rangatahi”

“This is why we do what we do,” says Tau, “the types of experiences ZEAL creates are life changing for our rangatahi.”

According to a 2020 Report by UNICEF, Aotearoa New Zealand has the second-highest rate of suicide in the OECD. Māori and Pasifika youth are four times more likely to attempt suicide than Pākehā. Faced with this statistic, youth development organisation, ZEAL launched an in-school culture and identity mentoring programme with an emphasis on suicide prevention.

“A lot of Pasifika youth often aren’t used to talking about their feelings,” says youth worker, Tautiaga Faaeteete (Tau), “they may have problems, but don’t have the emotional tools to articulate them.” That’s where ZEAL comes in. “We help give rangatahi the language to tell their stories.”

ZEAL tailor their approach to the needs of the individual and the challenges they are facing with the goal of building relationships built upon trust and equipping young people with the tools to make good decisions. Sometimes, making a positive change in a young person’s life starts with something as simple as a chat over a coffee or a quick trip into the city, says Tau. “It’s all about creating positive moments to interrupt the mess so rangatahi can discover what makes them tick and come alive.”

With COVID exacerbating so many mental health challenges that were bubbling under the surface, ZEAL wished to extend its mental health mentoring programme to Porirua, where they saw a great need. With help from a \$7,500 grant from the Nikau Porirua and Zac Pearson Funds, ZEAL were able to engage two youth workers to mentor six rangatahi per term.

“This funding means helping rangatahi at a crossroads,” says Tau, “it allows us to work with at-risk youth and provide a foundation to help them manage their mental health. It’s so important.”

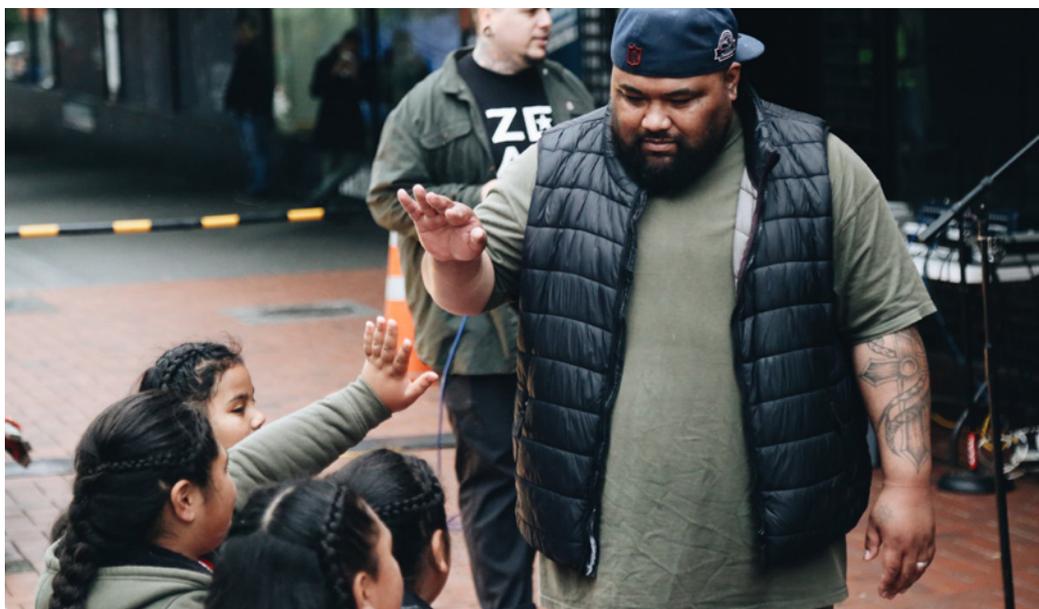


Photo credit: ZEAL Wellington

Performing arts scholarships changing lives through Acorn Foundation



Alfred Fonoti-Fuimaono, one of 10 recipients of the FAME Trust Emerging Practitioner Awards through Acorn Foundation in the Bay of Plenty.

Students selected for the FAME Trust Emerging Practitioner Awards all have a focus in the performing arts and the award winners each receive \$10,000 to further their career in the arts.

Alfred Fonoti-Fuimaono is a Samoan operatic baritone from Flaxmere, Hastings who is currently studying towards the completion of his Honours for his BMUS in Classical Performance at the University of Waikato. Alfred has starred at the University of Waikato Conservatorium of Music, playing the title role in 2022 of Gianni Schicchi in Puccini's play of the same name and playing the major roles of Crespel and Lindorf in *The Tales of Hoffman*.

In 2022, Alfred was a guest soloist for both the Trust Waikato Symphony Orchestra and Chamber Music New Zealand. He was also accepted to the New Zealand Opera Company and played the role of Orpheus in their production of *(m)Orpheus* in September 2023.

Alfred feels blessed to have won the Fame Trust award, saying, "I'm especially grateful for the Acorn Foundation and the FAME Trust, who continue to fund this award for aspiring artists. Many of us cannot realise our dreams

without their support. This award allows me to take the next step in my career, alleviating many costly necessities such as extra tuition, workshops with top teachers and coaches, and travel costs for auditions abroad."

While attending Hasting Boys' High, Alfred participated in Project Prima Volta, a music programme that helps to empower young people through the art of classical music. This programme inspired his passion for classical music, and he and his brothers formed ALOFA, an operatic quartet of classically trained singers who perform all over New Zealand.

Kristin Darragh, Director of Performance in Voice, at the University of Waikato sees enormous potential in Alfred. She said, "I am delighted that Alfred Fonoti-Fuimaono has been selected as the FAME Emerging Practitioner Award recipient for 2022. His vocal quality is remarkable, and his development as a performer with presence and charisma is extremely exciting. With the potential he displays, it is easy to imagine him on the world opera stage. I would like to thank the Acorn Foundation and FAME trustees for rewarding this very promising young artist."

Thinking big to build an environmental fund in Hauraki and Coromandel



Preserving and enhancing biodiversity and conservation lands across Hauraki and Coromandel is a long-term project requiring vision, perseverance, and resilient funding.

Currently, the Predator Free Hauraki Coromandel Community Trust and its programmes are supported by grants from Trust Waikato, Save the Kiwi Trust and DOC, all funding that is very gratefully received. “We are very serious in our intention to reduce our dependence on grants,” says Trust Chief Executive, Jude Hoosen. To this end, the ‘Fund for Nature – Hauraki Coromandel’ has been established with Momentum Waikato Community Foundation, as a key element of their sustainable financing plan for the future.

“Our partnership with Momentum Waikato is about providing a way for people everywhere to leave a legacy that supports the conservation work of Hauraki and Coromandel communities,” says Jude. “We’re not thinking small, we want to build a significant Fund for Nature.”

Funding The Breakfast Club in Dargaville



“What’s for breakfast today?” ask the kids arriving from 7am. Locals donate the food: Monday it’s spaghetti cups, Wednesday French Toast and Friday baked beans. Cornerstone Charitable Trust seeks to relieve families of some the financial and time pressures of daily life by providing breakfast with extras including warmth, care, and friendships that radiate from the coordinator, the volunteers and amongst the kids themselves.

Next on the list is raising funds to build garden boxes to teach tamariki how to grow vegetables - māra kai. The intention is to integrate Matariki methodologies and use maramataka to guide the planting of vegetables. Once the vegetables are grown, they will distribute these amongst their whānau and any excess vegetables will be distributed to food banks and pātaka kai. Another aspect of māra kai is to teach children about the enterprise of trade - growing a product, bringing it to the market and selling it.

“Getting children involved in growing their own vegetables will assist in alleviating some of the financial pressures whānau/families are facing. More resourceful communities are able to look after themselves and their environment,” says Northland Community Foundation’s Community Engagement Manager, Jane Scripps. “We are proud to be able to support Dargaville Breakfast Club with funding this year from the Northland Grassroots Fund”.

The Community Foundation difference



Acorn Foundation launches new research into priority areas for rangatahi



In May 2022, Acorn Foundation in the Western Bay of Plenty launched a youth targeted Vital Signs® Youth Report.

Vital Signs® is a tool used by community foundations across the world to understand community perceptions of the place where they live. It looks at the social, cultural, health, environmental and economic wellbeing of the area and identifies the key priorities according to residents. This information is then used by local organisations to identify and prioritise areas for funding.

Acorn published their first Vital Signs report in 2015, and a second report in 2018 which covered the whole Bay of Plenty region. In 2020, they partnered with TECT, Bay Trust and Tauranga City Council to create 'Vital Update - Tauranga', which focused on the city of Tauranga instead of the whole region, to allow a deeper dive into understanding the needs of the community.

The latest Vital Signs® Youth Report is the culmination of months of research, which sought to understand how Acorn Foundation funding can best support local providers to deliver the resources rangatahi in the Western Bay of Plenty need to live lives that they value.

The report uses data collected and analysed by Acorn Foundation and local researchers Growth Development, and provides a rich insight into the quality of life, sense of belonging, prospects for successful transition from education into employment, health, and aspirations of youth aged 14-24.

"Many generous Acorn donors, including the late Roy and Mary McGowan, have provided a substantial pool of funds each year that is targeted at supporting youth in the Western Bay of Plenty to thrive" said Margot McCool from Acorn Foundation.



Taranaki partnerships building a new community asset



Destination Play at Kāwaroa, is an initiative led by the Taranaki Foundation in partnership with mana whenua of Ngāmotu, Ngāti Te Whiti, New Plymouth District Council and NP Partners. Significant progress is happening behind the scenes to transform Kāwaroa Park into a much-needed community space devoted to providing a fun, exciting, accessible, and family-friendly environment for all ages.

The realisation of a community project of this scale has been made possible through generous support from a diverse range of contributors, encompassing public, private, corporate and philanthropic donations as well as in-kind support.

“We express our gratitude to all the donors, supporters and foundation, Kāwaroa and community partners for their continued backing and advocacy as we move closer to realising this vision and bringing the project fully to life.” Taranaki Foundation, chief executive Josh Hickford said.

Ngāti Te Whiti Hapū Chair Julie Healey echoes this sentiment and expresses support for the project. “Ngāti Te Whiti continues to support Destination Play and uphold and maintain the principle of Kaitiakitangato all matters and concerns within Ngāti Te Whiti rohe.”



Destination Play, a project led by Taranaki Foundation, will significantly transform the foreshore at Kāwaroa Park into a regional destination.

Regeneration of a regional taonga in Tāmaki Makaurau

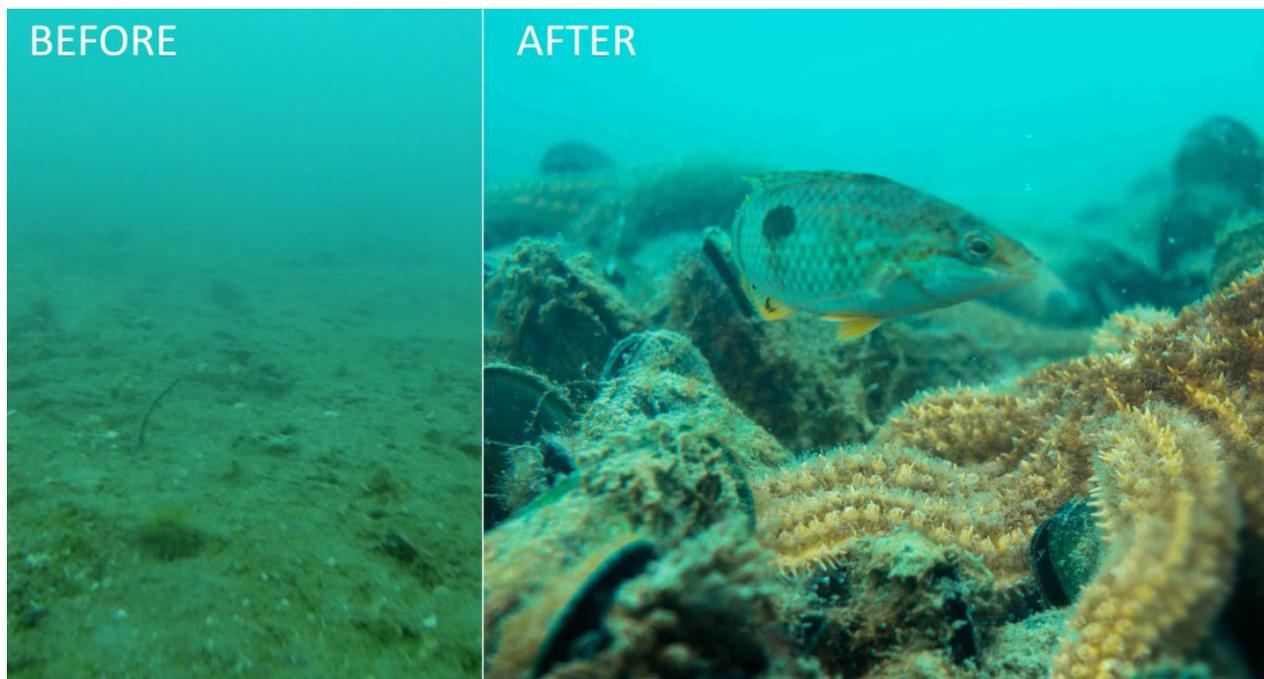


Auckland Foundation has established the Hauraki Gulf Guardians programme in response to the urgent work required to ensure the Gulf is regenerated and resilient to future challenges.

Hidden from view below the surface, the Hauraki Gulf/Tikapa Moana/Te Moananui-a-Toi is rapidly deteriorating. Over the decades, the urbanisation of its catchment area, farming and fishing practices, and climate change, have all taken their toll.

Auckland Foundation established the Hauraki Gulf Guardians programme in response to the urgent work required to ensure the Gulf is regenerated and resilient to future challenges. They identify areas of highest impact using evidence based research and an expert advisory panel to create long-term, synergetic partnerships.

“Through our activities to inspire and encourage generosity we secure funding for immediate and future needs,” says Foundation General Manager, Melody Mobsby. “We have sector and commercial strategic partnerships in place which will help to ensure that our collective efforts are maximised to work towards our goals of reducing the impact of sediment and pollutant run-off on the Hauraki Gulf.”



Auckland Foundation's work with regional partners is regenerating the Hauraki Gulf for future generations.

**Auckland
Foundation**

Collective Women's Fund making an impact in South Canterbury



The Aoraki Foundation Women's Fund was launched as a fund which will inspire the future of women and girls. At their 2023 event \$10k was distributed to five deserving causes in South Canterbury. These included, Project Period, Postnatal Adjustment Programme, Family Works, Pinc and Steel and Women's Refuge.

"These charities are making a difference to the lives of women and girls, many of which are at a low point in their life. It is a constant struggle for charities to get funding so gifts like this make a real and meaningful impact," said committee Chair Tam Johnson.

The main aim of the Aoraki Women's Fund is to establish a permanent endowment fund, to support local causes forever. The committee has been working towards this goal for two years now and has already raised over \$20,000 through regular monthly donations from a small group of dedicated women, many of whom serve on the committee.

"Several attendees expressed interest in becoming regular donors to the fund, and we welcome anyone who wants to join us in building a permanent fund to support women. Even a small contribution of \$10 a month can make a significant difference in elevating women in the community," said Tam



Aoraki Women's Fund committee members Annah Aikman & Tam Johnson with guest speaker Sange Malama and Katy Houston from Multicultural Aoraki.

Giving back to the region where your heart resides



Owen Greig has dairy farming in his blood. He grew up on the family farm in Horowhenua and now farms his own land, in conjunction with his family, in the picturesque region of Horowhenua/Manawatu.

Owen believes many people remain attached to the region where we grow up, and most of us have a desire to eventually give back. When he heard about the plans to grow a regional community foundation, “to build a new community asset”, he was immediately interested in the wider potential and joined the board as a trustee.

“Fundraising for causes is getting harder and there’s a lot of energy put into raising money. Many people don’t know alternatives, or how to set things up in a better way”.

He sees that a local community foundation will fill a gap on many fronts. “It’s community-based and, if it is well set up and well-networked, it should be able to address local needs. I’m all for helping the region develop a fund that is working to address community need, and the great thing is it can grow from everyone doing their bit.”

“For me, I see that there are plenty of people out there who are able to, and who want to, give back. They just don’t always know the best way to go about it. The beauty of community foundations is that they make giving easy and look to address community need, so you know your money is going where it’s going to make the biggest difference. I really like that model.”

Owen says that some farms are struggling with plans for succession and also to know what to do with their assets in the future. He says that the community foundation can solve those issues. “People can leave a gift in their will that

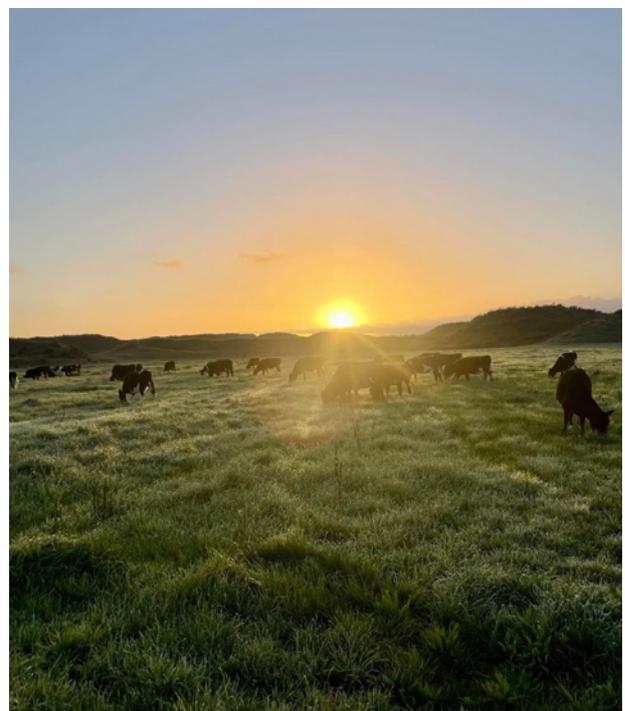


Photo of the Greig’s dairy farm in Horowhenua/Manawatu.

is specific to the needs they want to support, in perpetuity. The local community foundation will take care of it. It’s a great model and enables everyone to think how they might be able to be involved, whether with a gift in their will or while they are alive, helping to build something meaningful for the region.”

“If everyone thinks how they will put their shoulder to the wheel, whether by giving time, some money or assets, we can build something together really amazing for our region.”



Fanning the flames of giving

What's the spark, why do people give? For the vast majority it comes down to our individual or collective values, beliefs and experiences. This informs a sense of duty to give back and tackle inequality by giving some of our own good fortune to help others. It boils down to simple human generosity and regard for others.

Interestingly, this is the exact definition of 'philanthropy - the love of humankind'.

Where's the fuel, how much is given? Total philanthropy and grantmaking was estimated at \$3.8 billion for 2018 and is increasing, with bequests set to become more significant with an aging population and rising asset values. The largest gains for receivers of philanthropic giving is in welfare and human services related sectors such as social services, community development and disabilities. Giving to the environment, to sustain our planet, is growing.

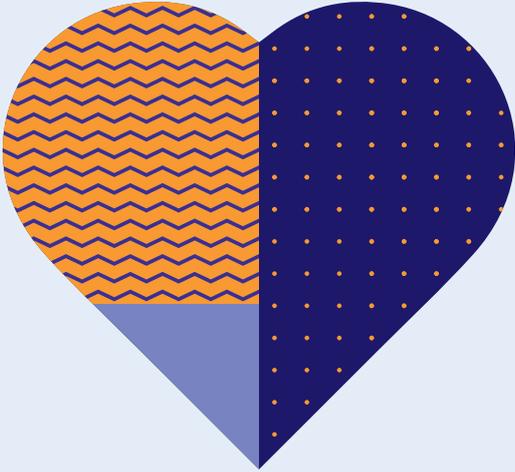
However, it's also important to remember not all giving is financial, with volunteerism continuing to be of critical importance at a \$4b pa value to the New Zealand GDP.

Can we fan the flames – can philanthropic giving be doubled in New Zealand? We are on the cusp of the largest intergenerational wealth transfer in modern history, and we have an unparalleled opportunity to use our rising wealth to increase giving to those who need it most. The giving landscape in this beautiful country of ours is a rich green, yet still possesses so much growth potential.

Now is the time for the New Zealand Government to support a national co-funded campaign to build on the culture of giving across Aotearoa and inspire the nation to reach deep, plan forward and think smart about their giving, today and for the future. Now is the time for the New Zealand Government to incentivise giving through improved tax treatments, matched funding initiatives and strategic investment into the philanthropic sector.

Right now is the time to light the fire on giving as a collective act of generosity, love and regard towards others. Most fires destroy things, but not this fire, it creates positive impact and changes lives for everyday Kiwis.

By Arron Perriam



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Tōpūtanga Tuku Aroha o Aotearoa