



**Community  
Foundations**  
of Aotearoa NZ

Hei whakakaha i ngā  
hāpori o Aotearoa



# Annual Impact Report

2023-2024



# Reflections on an extraordinary year.

**Raymond Key,**  
Board Chair

**It is an honour to present the 2023/2024 Board Chair Report for Community Foundations of Aotearoa New Zealand (CFANZ). This year has been one of growth, learning, and resilience as we continue our commitment to strengthening communities through place-based giving. Despite challenges, our network remains steadfast, adapting and evolving to meet the needs of Aotearoa's philanthropic landscape.**

## Strengthening Connections and Expanding Impact

One of the year's standout moments was our Activate Impact conference in Wellington, bringing together thought leaders from Aotearoa and beyond. The collaborations reinforced the power of community philanthropy and our collective impact.

We also deepened global connections, with team members attending conferences in Australia, Canada, and Colombia. These experiences strengthened our network and reaffirmed CFANZ's role in the international community foundation movement, ensuring we bring the best ideas and practices home to Aotearoa.

## Growth and Collaboration

A key milestone was welcoming the Southland Foundation into our network, ensuring every region in Aotearoa has a platform for place-based generosity. This achievement was made possible by Chief Executive Arron Perriam's dedication to strengthening the network.

Our team also grew, with Ellen joining as a marketing advisor, enhancing our ability to share impactful stories. We celebrate key leadership achievements:

- Arron Perriam was appointed to the Board of Philanthropy New Zealand, reinforcing our sector-wide influence.

- Eleanor Cater, our Philanthropy and Membership Director, completed a Winston Churchill Fellowship, bringing back insights into the global growth of community philanthropy.

## Resilience in the Face of Challenges

The past year brought challenges. Financial pressures continue to impact the sector, but the resilience and innovation of our member foundations have been remarkable. Despite constraints, community foundations remain committed to their mission, adapting while growing their impact.

We extend our gratitude to our funding partners—The Tindall Foundation, Craigs Investment Partners, and Fonterra—for their unwavering support. Their belief in our vision strengthens philanthropy in Aotearoa.

## Looking Ahead: A Future of Opportunity

As we look ahead, the intergenerational wealth transfer presents a major opportunity. CFANZ remains committed to advocating for its potential, ensuring more New Zealanders understand how to leave a lasting legacy.

Our work embedding the United Nations Sustainable Development Goals (SDGs), supported by the Mott Foundation, is another step forward. This initiative aligns philanthropy with global sustainability, ensuring today's generosity creates a better tomorrow.

We also express our deep appreciation to Ranei Wineera-Parai, who is stepping down from the Board. Her contributions, particularly in bringing Te Ao Māori perspectives and community insights, have been invaluable.

## A Collective Effort

Our success is a testament to the dedication of many. To our board, staff, donors, volunteers, and supporters, thank you for your passion and commitment. Your efforts drive the growth of community philanthropy in Aotearoa, ensuring that we continue to build a more connected, resilient, and generous nation.

Together, we are shaping a future where place-based giving transforms lives and communities for generations to come.

Ngā mihi nui,  
Raymond Key  
Chair, Community Foundations of Aotearoa New Zealand



**Arron Perriam,**  
Executive Director

## Community foundations act as trusted intermediary agent for community hope, transformation and wellbeing, enabling a more civil and equitable society for all – like a bridge between intention and action!

So much of our mahi is rewarding – like that moment when you have the privilege of connecting local generosity with local causes, and in some small but meaningful way, act as an agent for positive social change. Some of our mahi is just challenging – like sustaining emerging community foundations in mostly smaller communities, with small teams, and the need to be a jack of all trades certainly presents challenging times too.

To all our members across the motu of Aotearoa New Zealand, the 59 staff and the 132 volunteer board members, congratulations on another great year building an enduring legacy. We at CFANZ are immensely proud of your collective mahi, determination and vision for local impact.

Endowment growth and distributions across member community foundations continues to be strong with

significant growth being realised through trust transfers over the past year, 46 in total at a value of \$12.4m.

This past year we also registered and are getting ready to launch Southland Foundation to our member network, it's been encouraging to see them expedite their launch off the back of learnings from our 17 other foundations.

CFANZ moves forward with a refreshed three-year strategy focusing on building awareness, promoting learning and connectedness, improving our service offering, and providing leadership to members. Over the past year CFANZ has made a shift towards supporting members through building better infrastructure for growth and impact, including the launch of our new Redseed cloud-based learning and development platform, and launch of the Salesforce CRM project which will help create a center of excellence, with data and evidence better informing future growth.

Our posture at CFANZ is always to 'support your success', and with your guidance and involvement through regional hui, meetings and governance we remain confident in our pursuit of this, with and for you. I read somewhere recently, *'the sky can seem closer than the road ahead'*. Sometimes the vision for a more civil and equitable society for all might feel a long way off. To this I implore you to stay your course, stay patient, and trust the legacy you are helping to build, for this, and generations to come.

Arron Perriam  
Executive Director



# Our commitment to Te Tiriti o Waitangi

Community Foundations of Aotearoa New Zealand recognises the role of Te Tiriti o 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 commitment, expressed through our name



In September 2023 Community Foundations of New Zealand announced our name change to Community Foundations of Aotearoa New Zealand (CFANZ) to reflect our commitment to becoming a good treaty partner.

CFANZ recognises the need for community organisations such as ours to work together with Māori in partnership for improved community outcomes and realise the potential for generosity throughout Aotearoa. We acknowledge that we have much to learn from Māori around how they express generosity which will lead to greater social cohesion and strengthened communities.



# Our board

## The Community Foundations of NZ Board 2023-2024:

<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
	Josh Hickford	CEO of Taranaki Foundation
	Em Lewis	CEO of Nikau Foundation, Wellington
	Holly Snape	CEO of Community Waikato/Trustee of Momentum Waikato Community Foundation
	Nick Thompson (PhD)	Marketing Manager at Physiotherapy NZ
	Ranei Wineera-Parai	Executive Cultural Advisor for the New Zealand Health Group

## Departing board members in 2023/24:

Dame Fran Wilde	Chair of Nikau Foundation, Wellington
Amy Carter	CEO of The Christchurch Foundation
Ranei Wineera-Parai	Executive Cultural Advisor for the New Zealand Health Group

Thank you all for your leadership and dedication, ngā mihi nui.

## New Board Trustee welcomed in 2023



Following our AGM in September, we were very proud to welcome Emma Lewis, Executive Director of Nikau Foundation, Te Upoko-o-te-Ika-a-Māui, the Greater Wellington region's community foundation, to the Community Foundations of Aotearoa NZ board.

Since arriving in New Zealand in 2015, Em has been proud to call Wellington home. Having worked across a range of

sectors in the UK and NZ, Em has proven leadership skills in fundraising, strategic partnerships, marketing, and communications. Passionate about making a difference, Em has held advisory positions for Rotary and a charity that supports women in the Hutt Valley. Em lives in the Wairarapa with her family and is a mum to a curious, creative, and energetic six-year-old and new baby boy.

**“Community foundations play a crucial role building resilient communities. They are becoming an essential part of Aotearoa New Zealand’s philanthropic infrastructure, enabling local people to become a part of shaping the future of the places they love. The wider potential of community foundations across Aotearoa NZ is limitless and it’s an honour to play a part growing this movement of community philanthropy across the country”**

**Em Lewis, CFANZ Board member**



### Our Patron

Her Excellency, the Right Honourable Dame Cindy Kiro, GNZM, QSO, Governor-General of New Zealand continues as Patron for our change-making work.

Dame Cindy's guiding principles of kaitiakitanga, oranga and manaakitanga align closely with those of Community Foundations.

**"Community Foundations have a core ethos of effective funding. They understand the particular challenges our communities face and know where funding should be directed to achieve the greatest possible good"**

Dame Cindy Kiro



### Our Ambassadors

Our heartfelt thanks also go to our national Ambassadors: Neil Craig, Bill Holland, Miriama Kamo and Sir Stephen Tindall, who never fail to support this mahi and share their passion for the wider vision, harnessing the resources of a region to foster community self-determination.

We know that you, our Ambassadors, appreciate the wider potential for community foundations to be changemaking, growing communities through philanthropy, ngā manaakitanga.

### Our Management Team

Our young membership organisation exists to support the network of community foundations and their success. We run training programmes, local strategic workshops, regional hui, our sector conference, coaching sessions and offer guidance. We undertake research and provide marketing and comms support. We compile national statistics and fiercely advocate for the work of this sector.

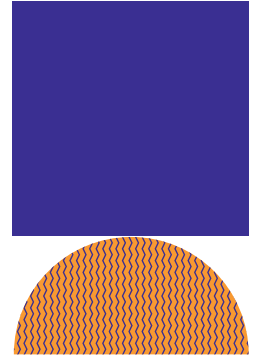
We bring our young network together to share insights, best practice, guide quality standards and we are currently implementing a National Standards/attestation programme to bring even more robustness to this mahi.

We are small and mighty, a bit like the 18 young community foundations we represent across the motu. Our current team works remotely, from Porirua, Wellington and Christchurch and this is us:



(Left) Eleanor Cater – Philanthropy and Membership Services Director (Porirua based) (Middle) Arron Perriam – Executive Director (Christchurch based) (Right) Ellen Miles – Marketing Advisor (Wellington based)

# Our Strategy



**Community Foundations of Aotearoa NZ (CFANZ) is the national body for our 18 regional community foundation members. Our responsibility is to serve the success of community foundations through providing leadership, growing awareness, facilitating connection and learning, and enhancing services and practices across our member network.**

Our collective purpose together is to 'strengthening communities across Aotearoa NZ' by harnessing Kiwi generosity and distributing funding through high performing community foundations.

- Over the past year the types of activities flowing from our strategic focus include:
- Brand awareness campaigns including September Wills Months campaign, in partnership with Aro Digital and TVNZ.
- Growing our digital capability including a cloud-based L&D platform and CRM development project.
- Leading the establishment of the Southland Foundation.
- Aligning our work with the Sustainable Development Goals across our operations and grantmaking.
- Providing learning opportunities supporting bicultural competency and commitment to Te Tiriti.
- Facilitating both regional and national hui with members.
- Delivery of face to face and webinar learning and development opportunities.
- Supporting community foundations in growth, specific areas of challenge, risk or opportunity.
- Developing our national standards and attestation programme.

## FACILITATE CONNECTION & LEARNING

### *Community Foundations are more effective*

- National standards accreditation
- Commitment to best practice
- Training, education and skill-sharing
- On the ground support

## GROWING AWARENESS

### *Growing awareness & engagement*

Donors / Professional Advisors / Philanthropic Sector / Government / Corporate

### *Building CFANZ & member sustainability & resilience*

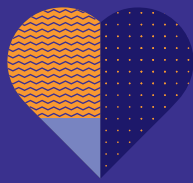
## INSPIRING LEADERSHIP

### *CFANZ leads by example.*

## OUR VISION

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

How we will achieve this vision:



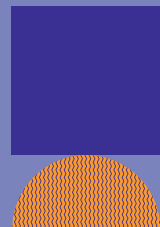
Drive awareness to attract  
support for our network



Facilitate connection and  
learning in the network



Enhance the service  
to the network



Inspire leadership  
within the network

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## Our Values

**Generosity**

**Impact**

**Service  
to members**

**Respect**

**Innovation**

**Inclusiveness**



# Key activities for the year 2023- 2024

# 48

LOCAL  
MEMBER  
ENGAGEMENTS



Commitment to Te Tiriti embedded  
into national strategy  
**Southland Foundation registered**  
**Dr Claire Routley** bequest  
workshops NZ tour

## Leading & supporting growth.

**Funds** **144**  
**1821** **Grants**  
*New records!*



## International Collaborations

**Mott Foundation** (SDG  
alignment)

**Community Foundations**  
**Australia** collaboration

Global Fund Community  
Foundations (Bogotá **'Shift the  
Power'** summit – 4 attended  
from network)

**Global Giving** (Global Disaster  
Response funding)

Fundraising Nest Australia

Legacy Futures UK

Revolutionise International

**University of Kent** Centre for  
Philanthropy

**Community Foundations of**  
**Canada** (Toronto conference, 3  
attended from network)

UKCF collaboration and Winston  
Churchill Fellowship study tour



## Reports & Research

**Winston Churchill Fellowship**  
**research** – 'Expediting the Growth  
of Community Philanthropy'

CFANZ 2022/23  
**Impact Report**

Annual **member**  
**statistics**  
compiled



### NZ PARTNERSHIPS

**The Tindall Foundation**  
(ongoing funding commitment)

**Craigs Investment Partners**  
(ongoing funding commitment)

**Fonterra**  
(3-year funding committed)

**Philanthropy NZ**

**Rio Tinto Murihiku Fund**  
**and Great South**  
(for Southland Foundation)

## Compliance

- ✓ Produced the new **Auditor Briefing Booklet**
- ✓ Independent **Financial Audit** (BDO)
- ✓ **National standards programme** progressed with 3 members completing the process
- ✓ Annual returns completed
- ✓ Insurance and policy development

## AWARENESS & Advocacy

**Employed new Marketing Advisor**  
**Philanthropy NZ**  
(Arron appointed to board)

## 3 National Campaigns

increase in **marketing**  
**investment and growth** in  
digital campaign work

**30%**

**346.8%** **increase in**  
**DATA DRIVEN ACTIVITY**

# Our network growth



17 PARTNERSHIPS  
FOR THE GOALS

# Our members



“We are a young network and there is great potential for community foundations to lead the change agenda in communities, which we are seeing develop through the work of our 18 member foundations across the country. That’s what we stand for - hei whakakaha i ngā hāpori o Aotearoa - strengthening the communities of Aotearoa NZ”

- Eleanor Cater, Membership Services Director



# Our strategic partners



**Community Foundations of Aotearoa New Zealand (CFANZ) extends its heartfelt gratitude to our strategic partners for: The Tindall Foundation, Craigs Investment Partners, The Charles Stewart Mott Foundation, and Fonterra. Your unwavering support and generous financial contributions have been instrumental in advancing our mission to strengthen communities across Aotearoa New Zealand.**

The Tindall Foundation's commitment to growing generosity aligns perfectly with our vision, enabling us to initiate transformative projects that foster community resilience and well-being. Your partnership allows us to enhance our outreach and impact in areas that matter most.

Craigs Investment Partners has played a crucial role in our growth, providing not only financial support but also invaluable expertise in investment and financial management. Your dedication to fostering community development empowers us to make informed decisions that benefit the wider community.

Fonterra's support exemplifies a commitment to corporate social responsibility, reinforcing our collective effort to create a thriving culture of giving. Your contributions help us address pressing community needs, ensuring that we can respond effectively to the challenges faced by many New Zealanders.

The Charles Stewart Mott Foundation's funding and global remit for forwarding the 2030 sustainability agenda downunder has enabled CFANZ to partner with its community foundation network across the motu to consider and elevate the UN Sustainable Development Goals.

Together, we are building a stronger, more connected Aotearoa, and we deeply appreciate your partnership in this vital work. Thank you for believing in our vision and for your continued support.



We would also like to acknowledge our key 2023 conference sponsor also;





# Research – Growing Community Philanthropy

**In 2023, our Philanthropy and Membership Director, Eleanor Cater, undertook an extensive research project as part of a Winston Churchill Fellowship, examining the influences on community philanthropy growth, including conditions for its success. Her report explores the role of community foundations in unlocking local resources and empowering communities to shape their future.**

*Eleanor's resulting research report 'Expediting the growth of community philanthropy' can be found at the link below, following is an excerpt from the paper.*

## **Expediting the growth of community philanthropy**

Aotearoa faces great challenges and it's becoming increasingly evident that the New Zealand government and the existing funding sector cannot address all the current issues of society. New philanthropy, from private individuals and the business sector, must form a part of the solution.

The good news is that we have a major opportunity sitting on our doorstep: the biggest intergenerational wealth transfer the world has ever seen: the baby boomer wealth - estimated to be around \$1.25T in Aotearoa New Zealand - and transferring to the next generation over the next 20 years. There is no doubt that, with skill and significant know-how, a percentage of this wealth can be unlocked and steered towards community-led solutions.

However, new philanthropy doesn't happen by chance, and transformative philanthropy, even less so. This report outlines some of the common threads that help effective philanthropy to flourish and the urgency around making that happen.

Touching on many of the initiatives and incentives which have helped to create more favourable conditions for philanthropy in both the UK and Canada, this report concludes that there are actions we can take here in New Zealand to create similar enabling conditions.

We must remain curious to look at other ways to build philanthropy, outside of 20th century big, endowed institutions, towards more collaborative funding opportunities. Community foundations have enormous potential to respond to both collaborations and community need, but only if they are well resourced and enabled through a supportive philanthropic ecosystem. Community foundations sure need sector partners, in this waka and on this journey, growing community philanthropy for the benefit of our communities, now and into the future.

**"Community foundations are just as important in the landscape as local government structures, but they are far less well known. Their potential to unlock philanthropy and to steer resources to where they are needed in communities, to enable local self-determination, is immense",**

**- Dame Fran Wilde, Expediting the growth of community philanthropy, Winston Churchill Fellowship report, September 2023.**



Read the full report at: <https://communityfoundations.org.nz/latest-news/growing-community-philanthropy>

# Statement of Financial Performance

## Community Foundations of New Zealand Incorporated For the year ended 31 March 2024

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

Revenue	Notes	2024	2023
Donations, fundraising and other similar revenue	1	495,495	376,923
Fees, subscriptions and other revenue from members	1	102,519	78,251
Interest, dividends and other investment revenue	1	7,886	1,617
Other revenue:	1	2,000	0
<b>Total revenue:</b>		<b>607,900</b>	<b>456,791</b>

### Expenses

Volunteer and employee related payments	2	235,512	206,425
Expenses related to providing goods and services	2	239,311	61,784
Grants and donations made	2	30,870	60,000
Other expenses	2	124,672	107,434
<b>Total expenses:</b>		<b>630,672</b>	<b>435,643</b>

<b>Surplus/deficit:</b>		<b>(22,772)</b>	<b>21,148</b>
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# 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	Notes	2024	2023
Bank accounts and cash	3	416,399	248,217
Debtors and prepayments	3	100,000	2,071
Investments		107,141	54,720
GST		1,178	0
<b>Total current assets:</b>		<b>624,717</b>	<b>305,008</b>

### Non Current Assets

Property, plant and equipment	5	727	1,454
Total non-current assets:		727	1,454
<b>Total assets:</b>		<b>625,444</b>	<b>306,462</b>

### Liabilities

Creditors and accrued expenses	4	34,444	22,072
Employee costs payable	4	12,003	11,951
GST		-	13,753
Unused donations and grants with conditions	4	368,083	25,000
<b>Total current liabilities</b>		<b>414,531</b>	<b>72,776</b>
<b>Total liabilities:</b>		<b>413,531</b>	<b>72,776</b>

<b>Total assets less total liabilities (Net Assets)</b>		<b>210,914</b>	<b>233,686</b>
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### Accumulated Funds

Accumulated surpluses or (deficits)	6	210,914	233,686
<b>Total Accumulated Funds</b>		<b>210,914</b>	<b>233,686</b>



# Our national conference.

Our sector conference was held from September 19-20 2023, in Te Whanganui-a-Tara, Wellington. With the theme being 'Activate Impact', the lineup included a cross section of thought leaders from Aotearoa NZ and around the world.

ACTIVATE  
IMPACT<sup>23</sup>

Arron Perriam, CFANZ, presents the annual 'state of the foundations' presentation at the CFANZ annual conference



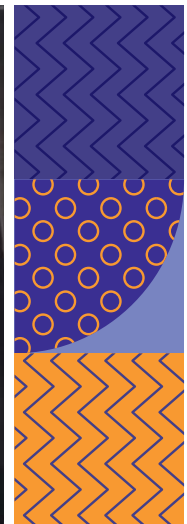




Bridget Williams, Bead and Proceed Creativity station  
- activating SDGs

We were delighted to begin our conference with keynote speaker Bridget Williams from Bead and Proceed. Bridget brought enormous passion and commitment to the UN Sustainable Development Goals, which provide a helpful framework inspiring local action for global impact.

Next up in the programme was Dr Claire Routley from Legacy Voice in the UK, who inspired us with global thinking around what it takes for a culture of philanthropy to thrive



Breakout sessions on day one included a wide exploration of best practice and thought leadership with a focus on Māori funding frontiers (Seumas Fantham and Kate Frykberg), participatory grant making (Lani Evans, Mandy Smith and Mya Kairau), legacy insights (Dr Claire Routley), developing philanthropy advisory services (Eleanor Cater), operational sustainability (Arron Perriam), digital marketing (Aro Digital) and a focus on personal and professional wellbeing (Josh Hickford).

Our member foundations shared their mahi in communities throughout the 'one bright idea' sessions - thank you for all the incredibly bright ideas and sage wisdom shared throughout the two days!





Our conference dinner, sponsored by Craigs Investment Partners, provided a wonderful opportunity to connect, relax and consider our collective impact. Mya Kairau from Southland was our guest speaker, who spoke about the importance of participatory funding into communities, including hearing the voices of our rangatahi around decision making tables.



Mya Kairau (centre) with CFANZ Ambassador Bill Holland and Mandy Smit





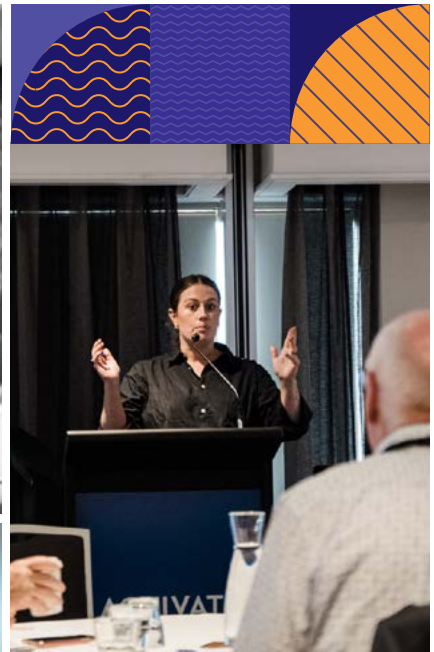
Day 2 opened with a virtual session by Steve Alley and his team from Ekstrom Alley Clontz and Associates from the USA, exploring international community foundation operating models and best practice, including wise words of wisdom: 'you are what you have done'.

CFANZ's own Eleanor Cater detailed the findings from her Winston Churchill Fellowship project which looked at the growth of community philanthropy in the UK and Canada, including best practice and inspiring a shift towards community-led funding.

Haimona Waititi from Tūmanako Consultants followed as keynote speaker, sharing a Te Ao Māori view of philanthropy, an exploration of Te Tiriti and a vision for a community-led future, in partnership with tangata whenua.



Climate change and emergency funding into communities followed with Lori Luke, Linn Araboglos, Amy Bowkett and Clive Pedley all sharing the mahi they are undertaking in this space and a collective call for the urgency of climate action and emergency preparedness. Amy Bowkett shared the harrowing journey of her whānau and Hawke's Bay Foundation in the aftermath of Cyclone Gabrielle.



CFANZ members and Australian colleagues continued the 'one bright idea' sessions by sharing some of their recent work and best and brightest ideas.

An investment market update by Mark Lister from Craigs Investment Partners followed, a look back and a look forward to where investment markets are expected to head over the coming months.





The conference closed powerfully with plenary speaker Mele Wendt, Chair of the combined Community Trusts sector, who reminded us why our communities need community foundations to be leaders focused on the best community outcomes.



Finally, a thank you to our Australian colleagues Maree Sidey and Ian Bird (Deputy Chair and CEO, Community Foundations Australia) for joining us and for exploring collaborative approaches growing philanthropy and community impact across our special corner of the planet, *ngā mihi nui*.

Thank you to everyone for your thought leadership and inspiration. Here at CFANZ we are left with a very strong belief that the future will be closely tied to community philanthropy, enabling community empowerment from within.

*Ngā manaakitanga.*

Conference photo credits: Julia Sabugosa Photography and Eleanor Cater



## Wills Month *September 2023*

A rise in localism, coupled with a rise in will-making across the world, saw a lift in the number of legacy gifts New Zealanders are leaving in their wills. In August 2023 the New Zealand Community Foundations' network reported over 650 confirmed legacy gifts, all to be invested for the benefit of local communities.

Edna Brown would be really proud of her legacy. This unassuming Tauranga local, who passed away in 2001, seeded through a gift in her will what was the first invested legacy gift with the fledgling Acorn Foundation in Tauranga. Fast forward 20 years and Sir Mark Dunajtschik, one of Wellington's most prominent philanthropists, also wanted to fulfil a desire to give locally: *"I made my money in Wellington, and I plan to leave it here when I go."*

What do these two people, separated by time and place, have in common? They are leaving a gift in their will through New Zealand's network of local community foundations, and they are two of over 650 who have already decided to do so.

"I'm not surprised about any of this, people love to give locally", said Dr Claire Routley, visiting legacy specialist from the UK. "And Community Foundations provide a great means for locals to activate their legacy, giving back to communities for the long term in a structured way".

New Zealand research<sup>1</sup> showed that Kiwis do prefer to support charities in their local area. "That's certainly something we see playing out across the country", says Arron Perriam, Executive Director of Community Foundations of AotearoaNZ. "There is a real deep-rooted desire for people to leave their legacy locally. And it's so easy to do it through your local Community Foundation, a bit like having your own local trust, but without all the hassle".



## A giving story - Edna Brown

Edna Brown grew up in Rotorua, where she was the youngest in a family of ten children, five boys and five girls. She married George Brown and they lived in Wellington, where Edna worked in the hotel industry. Edna was a very determined lady, and she was always very kind to people who were in need. After her husband George passed away, she lived her final years in Tauranga.

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

Her executors were unsure how to go about choosing recipients, so decided to put the estate balance of \$67,200 with Tauranga's fledgling Acorn Foundation, in Edna's name, with investment income going to areas of her interest. They could see the potential for Acorn Foundation's not-for-profit model to invest Edna's gift and channel it to regional needs over time.

Thus, in 2003, Edna Brown became the first Acorn Foundation donor and seeded the first personal legacy fund ever in the New Zealand community foundations network. Fast forward to 2023 and Edna's legacy fund has given out more than the original gift (total grants made to date are \$75,839); and the original gift has grown to be \$93,252.

## How an invested Endowment Fund works:

**2003 - The Edna Brown Fund established, giving to healthcare causes locally**



First established with  
a fund balance of \$67,200

**2023 - After 20 years**



**\$93,252**  
Fund balance



**\$75,839**  
Grants  
distributed

**2053\* - After 50 years**

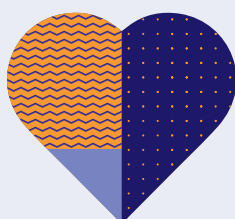


**\$134,247**  
Fund balance



**\$210,030**  
Grants  
distributed

\* Estimated growth rate of 6.5% for future years and an annual distribution of 4%  
Thank you to Acorn Foundation for this real example of a live invested endowment fund.



Edna chose to support medical research or treatment causes in the Western Bay of Plenty and, in 2023, her legacy fund had given to 14 different causes - some multiple times.





## A giving story - Sir Mark Dunajtschik

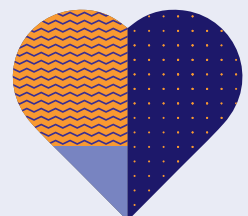
From his professional beginnings as a tool maker, to becoming a heavy hitter in Wellington's property development industry, Sir Mark's working style has always been hands on. His approach to philanthropy is similar. "Sometimes 'philanthropy' is seen as writing a cheque and walking away, but I've never been like that," says Sir Mark.

This drive to give back was seeded in Sir Mark's childhood. A native German born in the former Yugoslavia, Sir Mark spent three of his formative years imprisoned in a WWII concentration camp under Marshall Tito's rule of Yugoslavia, before settling in Germany as a refugee. Finding work as a tool maker, Sir Mark stayed in accommodation that also housed people with disabilities while he completed his apprenticeship. It was the combination of these two life-changing experiences that brought Sir Mark's attention to those less fortunate and set the scene for a lifetime of philanthropy.

Leaving a gift in his will is always something that Sir Mark always planned on doing, saying "my partner Dorothy and I have had our bit in life, so now we want to make sure our good fortune is passed on to others".

Sir Mark had a specific vision in mind and wanted to make sure he found the perfect giving vehicle to execute his giving goals. His number one criteria was that his estate had to stay in the Greater Wellington region. "Wellington has been my home for nearly 60 years. This place gave me my first leg-up in life, and I wanted to reinvest in the city that made me," says Sir Mark. "The gift needs to have staying power and continue to give back for years after I've kicked the bucket."

As the Greater Wellington region's community foundation, Sir Mark found that Nikau Foundation's not-for-profit structure was the perfect fit for his giving goals. "Nikau is focused on local, and I trust them implicitly to give in the way I want." Sir Mark's gift to Wellington will give back in perpetuity, providing practical support to people living with disability.



## Community Foundations as a way to give

Community foundations, as a way to give, are a concept that New Zealand has taken on from the USA, where the first community foundation was set up in Cleveland in 1914. Frederick Harris Goff conceived the idea of a collective kind of community philanthropy, which would

enable local people to get together to pool their funds, to address local problems. Community foundations provide the ideal structure for locals to shape their legacy and, to this end, every year CFANZ spearheads September Wills Month across New Zealand

# Leave a lasting legacy.

Wills Month – September 2023



# Leave a lasting legacy in the community you love.

Wills Month – September 2023



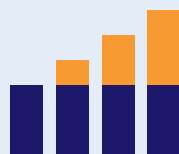
Hei whakakaha i ngā hāpori o Aotearoa

Community Foundations enable effective giving into communities, and one of the ways in which they do this is through their unique invested endowment model.

Here's how the invested endowment model works:



Your gift



is invested and grown



and the ongoing income earned



goes to the local causes you love.

# Wills month and Community Foundations in the news



## Lawtalk

In September, community foundations and philanthropy conversations were featured in Lawtalk – the New Zealand Law Society’s magazine. Titled ‘Golden conversations on leaving a legacy in a client’s will’ this his article can be accessed online here:

➔ <https://www.lawsociety.org.nz/news/publications/lawtalk/lawtalk-issue-955/september-is-wills-month/>

## Radio NZ

Also in September, visiting legacy expert from the UK, Dr Claire Routley, was interviewed on Radio NZ National about the transformative nature of gifts in wills to the charity sector, along with the potential of community foundations. This interview with Jesse Mulligan can be listened to here:

➔ <https://www.rnz.co.nz/national/programmes/afternoons/audio/2018907560/splitting-inheritances-between-families-and-foundations>





# International collaborations



## RECONNECT2023, COMMUNITY FOUNDATIONS OF CANADA CONFERENCE

**In June 2023, our management team, along with Deputy Chair Lori Luke, attended Reconnect2023, the Community Foundations of Canada conference in Toronto. This event was the first time that Canada's network of 205 community foundations had come together since the start of the Covid-19 pandemic, and it was set amongst great anticipation and palpable excitement, with 750 delegates from 21 nations. Eleanor Cater writes of this experience.**

Seeing how other nations approach the work of community foundations is spine tinglingly good. As the conference opened, Jeff Yost, CE of Nebraska Community Foundation shared with me the elegant and succinct way he describes his community foundation: "Communities can only be built by the people who live and work in them. We are in the community building business, and we use philanthropy as one of the tools to do this." OK so, being the philanthropy geek that I am, I know a good description when I hear it (and this folks, is one of the best).

Community foundations are rethinking and reimagining the potential of philanthropy, tackling the weighty issues of equity and inclusion, climate change, and pondering the emerging threat of AI. From aligning our work with the UN Sustainable Development Goals, looking into the vast potential for impact investments achieving social goals, shifting of power and new participatory forms of funding into communities (including charities deciding funding priorities for each other). There was a street party and delegate parade (which I can only describe as very North American) and endless side conversations with delegates from as near to us as Australia and as far from us as the Arctic (Annauma is Canada's newest Community Foundation, Inuit-led and based in Nunavut). Delegates from the Ukraine were also present - women only as

the men were restricted from leaving the country - and received a standing ovation for their perseverance and determination around building community amidst so much terror and destruction.

Community foundations in Canada have 80 years on us in terms of age and maturity, however the conference also gave me great affirmation that, in Aotearoa NZ, we are on the right track and that our people and our communities are rich in ideas, partnerships and generosity. The solid foundations we are building now will stand us in good stead as we steer community resources towards meeting community aspirations, and tackling systemic community issues, into the future.

It's early days for us in Aotearoa NZ and it can certainly be challenging working in the space aligning donors with community aspirations, particularly in the current climate when our communities have so many needs and local people may not even know where to begin or how they can possibly make a difference. But that's our immense value add: knowing our communities, unlocking new philanthropy helping to guide it to where it's needed most. The work of Community Foundations, in partnership with donors and community activators, is increasingly important in the local and philanthropic landscape, in building strong communities.



Elder Garry Sault opens the 750 strong Community Foundations of Canada conference: "The turtle emerges onto the land and sees the state of the world..." we have much work to do in addressing inequality and strengthening communities across the planet.

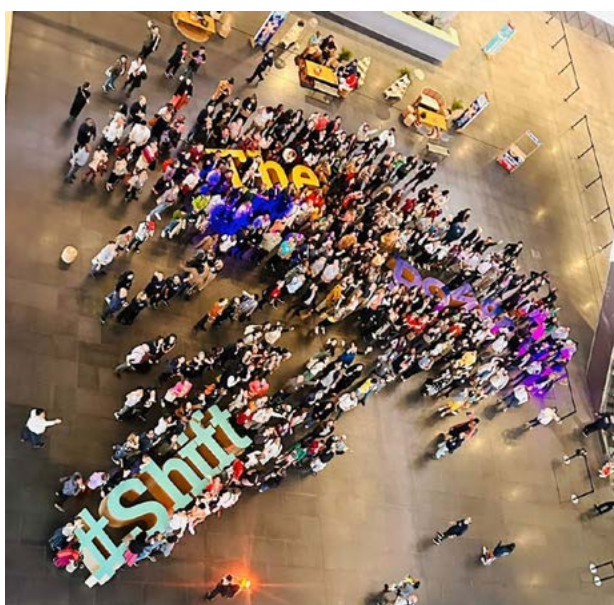
*Thank you to the Winston Churchill Memorial Trust NZ and Charles Stewart Mott Foundation for helping to fund international travel in 2023 and knowledge building from our international networks.*



## SHIFT THE POWER GLOBAL SUMMIT, BOGOTÁ COLOMBIA

**In December 2023, a small delegation from New Zealand joined the Australian delegation at the Shift the Power, the Global Fund for Community Foundations Summit, in Bogotá, Colombia.**

**Eleanor Cater writes that ‘the energy of local changemakers is our most powerful resource’...**



Funding into communities is important, but what if unlocking local energy is our most powerful resource of all, enabling us to embark on the transformational work and empowerment that our communities need? This idea was central at the Global Fund for Community Foundations (GFCF) #ShiftThePower summit in Bogotá Colombia in December, where surging community philanthropy and the changemaking energy from within communities was explored by over 700 delegates from 70 countries. I was lucky to travel to the summit with a delegation from Australia and NZ and I was left with a sense of the immense power of community energy in self-determination, along with the central role of community foundations in unlocking energy and empowerment at the community margins.

Community philanthropy, defined by Jenny Hodgson from GFCF as “communities mobilizing their own resources, be it financial, people, energy, things”, is on the rise across the world, accelerated by a global pandemic, which has seen local action galvanised, more than ever before. There is something transformative about the energy that comes from the activation of local resources, including people’s time, collective energy and money, leading to the self determination of communities.

We heard some moving perspectives from some of the most challenged places on earth, including Gaza and Ukraine, where raising money for human rights and social justice is seen as controversial and international aid is doing little to help ongoing humanitarian crises. We heard that the international aid system is broken, and that local empowerment is key to revitalisation, and recovery. We heard of new movements shifting power





Jennifer Belmont, Holly Snape, Eleanor Cater and Josh Hickford represent Aotearoa NZ at the #ShiftThePower summit in Bogotá, Colombia in December 2023.

within the development system, including the Network for Empowered Aid Response and RINGO, a systems change initiative reimagining the work of international NGOs.

We heard that building community is not transactional work; that dignity not money is at the centre of humanity. We heard of broken systems of 'impact measurement', mathematical calculations that simply leave out meaning and the nuances of humanity. We heard of new pathways of measurement in Brazil, Indonesia and Kenya utilising "moral imagination to capture the wondrous work going on in communities", measuring what matters, and respecting indigenous world views. We heard that the Latin American and Caribbean women's rights movement is leading some of the most important social changes happening in the region; women are organising collective approaches to addressing some of the most complex social problems threatening life, nature and democracies throughout the region.

Localisation itself, or more participatory development aligned with #ShiftThePower, activates empowered networks of local civic solidarity. History shows us that communities cannot rely on top-down approaches, outside resources, or simply the good intentions of philanthropy; the answers lie, and always have done so, in community self-determination.

*"The lamp is different but the light is the same"*: whether you are in Bogotá or Balclutha, Tanzania or Taupō, what we heard is that local people with their time, resources and catalysing energy, are the changemakers that our communities need.

*Thank you to the Global Fund for Community Foundations and Community Foundations Australia for enabling the Australasian delegation to attend the #ShiftThePower Summit in Bogotá Colombia. The NZ delegation was made up of a team from across Aotearoa NZ: Holly Snape from Momentum Waikato Community Foundation, Jennifer Belmont from Wakatipu Community Foundation, Josh Hickford from Taranaki Foundation and Eleanor Cater from Community Foundations of Aotearoa NZ.*





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

Community Foundations of Aotearoa NZ have 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.



# Funds which are building community

# Community



# Stronger together, collaboration shapes Hawke's Bay's recovery



Cyclone volunteer appreciation day in Hastings

## Following the devastating impact of Cyclone Gabrielle, Hawke's Bay's community funders rallied together showing the power of collaboration in times of crisis.

Hawke's Bay Foundation responded alongside the likes of Evergreen Foundation and Eastern and Central Community Trust (ECCT), to ensure efficient distribution of donor funds for cyclone relief and recovery.

Hawke's Bay Foundation itself played a critical role, generating and distributing over \$3M to support those most in need.

The Hawke's Bay Funders Forum was key in maintaining the momentum of support, ensuring a coordinated and informed response that continues to serve Hawke's Bay communities. Monthly meetings between funders, councils, and government agencies helped to strengthen relationships and share knowledge, ensuring a more unified approach to future challenges.

Collaboration between funders ensured an ongoing collective effort supporting local charities working in cyclone recovery, mental health initiatives and essential community projects—work that will be ongoing for years to come. With recovery expected to take up to 10 years, and financial impacts lingering even longer, continued support remains vital. These partnerships have shown that by working together, we can deliver more, reach further, and respond faster—not just in times of crisis, but for the future of our communities.

Ngā mihi nui to all who have played a part in this collective effort for resilience and recovery. Your dedication is ensuring Hawke's Bay remains strong, connected, and prepared for whatever lies ahead.

**LIVE HERE  
GIVE HERE**





# Growing a Māori health workforce for the future



**A deep commitment to health equity and Māori representation in the medical field has led two Waikato doctors to take action, creating a philanthropic investment fund dedicated to increasing Māori participation in the health sector.**

Te Rau Oranga Fund, established by Waikato Hospital doctors Ruth Tan (Ngāti Hangarau, Ngāti Mutunga) and Stephen Ng, along with their families and colleagues, is now held with Momentum Waikato Community Foundation. Their goal: improve Māori health outcomes by increasing Māori participation in healthcare.

The Fund supports scholarships, career promotion, and mentoring, starting at Te Kura Tuarua o Taniwharau-Fraser High School in Hamilton, Ruth's former school, before expanding to other Waikato schools. Scholarships will keep students engaged in education, providing financial support and mentorship.

Ruth's journey highlights the need for this initiative. Growing up in Kirikiriroa-Hamilton in a Māori-Chinese-Pākehā family, she had no Māori role models in healthcare and never saw herself in that world. Now, she wants to change that, "I want to remove the barriers I faced. If students see someone like me in this field, they'll know it's possible for them too."

Te Rau Oranga Fund is a 'by Māori, for Māori' initiative, supporting students who may not have considered a health career.

With chronic staff shortages in healthcare, increasing Māori participation will strengthen diversity and improve



workforce capacity. By contributing personally and transferring funds from a previous philanthropic project, Ruth, Stephen, and their colleagues have set the foundation for change, joined by founding donor Braemar Charitable Trust.

Momentum Waikato then Chief Executive Kelvyn Eglinton commended their leadership:

"They aren't big-time philanthropists, they're everyday professionals putting their time and money into something that will transform their sector. That's true community-driven change."

Te Rau Oranga Fund is now open for public donations. With community support, Ruth and Stephen's vision of a strong Māori presence in healthcare can become a reality—ensuring better health outcomes for Māori, delivered by Māori.

# From farm to philanthropy, a lifetime of giving back



From the age of 10, Fraser McKenzie knew he wanted to be a dairy farmer—despite not growing up on a farm. Determined to follow his dream, the “city boy” attended Massey University, worked on farms from a young age, and eventually purchased land in Ngakuru, south of Rotorua. He and his late wife, Dorothy, farmed there for over 60 years.



Beyond their own farm, Fraser played a significant role in the agricultural sector. Elected to the Bay of Plenty Harbour Board in 1974, he later became chairman of both the board and the Harbours Association of New Zealand, and was the founding chairman of Port of Tauranga Ltd, retiring after 30 years of service.

Dorothy and Fraser’s desire to give back led them to the Geyser Community Foundation. Recognising they had more than they needed, they saw an opportunity to support their local community in perpetuity. Their generosity began with contributions to Geyser’s operating costs and expanded to supporting funds for speech therapy, migrants, and the Rotorua Community Fund. They also played a key role in establishing the Waikato and Bay of Plenty Rural Support Fund, providing seed capital to assist farmers in need.

Their commitment continues beyond their lifetimes, with a bequest to Geyser ensuring ongoing support for rural communities. Believing that giving is not just for the wealthy, they encourage others to contribute—big or small—knowing that every dollar invested through Geyser will continue to give back forever.

For Fraser and Dorothy, giving is simple: it feels good. They feel fortunate for the life they’ve had and want to help those who haven’t been as lucky. Their generosity will support the local farming community for generations to come.

# More than a meal: Clutha Food Hub's big impact



When the Clutha Budget Advisory Service stepped in to take over food welfare services, it wasn't just about handing out food—it was about nourishing the community in more ways than one. With the transition, the service was renamed the Clutha Food Hub, reflecting its broader mission: providing food, financial mentoring, and connections to essential support services.

The vision of the Clutha Food Hub is simple yet powerful: a future where no one in the Clutha District goes hungry. Every food parcel comes with care, dignity, and guidance—because true food security isn't just about a meal for today, but about building a stronger tomorrow.

Recognising the Hub's growing impact, the Clutha Foundation has supported the Food Hub by providing donations totaling \$23,500. This funding has included donations from the Pannett Family Endowment Fund, to purchase new commercial upright freezers. These replaced aging chest freezers, improve efficiency, and has allowed the team to pre-prepare the frozen component of food parcels, making the service more streamlined.

But the impact doesn't stop there. The Clutha Food hub is now providing a financial mentoring service for the Food Hub clients. This next step isn't about feeding people – its about empowering the community, strengthening connections, and ensuring that everyone has the support they need to thrive.

The Clutha Foundation is proud to stand behind this vital service, ensuring that generosity continues to flow to where it's needed most.





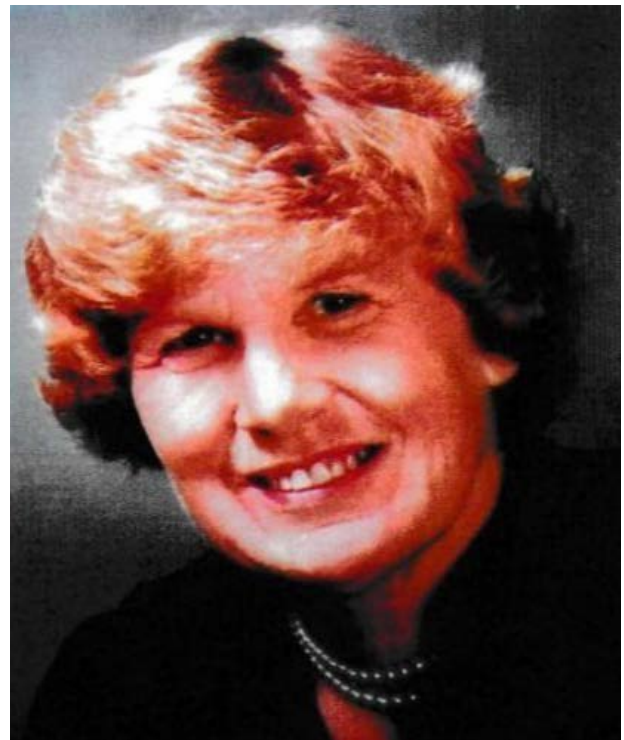
# Trust resettlements



# A legacy of support for Kāpiti's young people



June Oakley's dedication to her community was boundless. A trailblazer in local government, she served as Kāpiti's first female mayor from 1980 to 1983 and was deeply involved in organisations such as the Laura Fergusson Trust, Forest and Bird, and the local branch of UNICEF. As District Commissioner for the Paraparaumu Girl Guides, she championed youth development, leading fundraising efforts for a new Guide centre—later renamed the June Oakley Guide Hall in her memory.



June's passing in 1986 left a void, but those who knew her were determined to keep her generous spirit alive. In 1989, they established the June Oakley Memorial Youth Trust, dedicated to supporting young people on the Kāpiti Coast. Over the years, the Trust provided nearly \$204,000 in grants, helping over 300 local youth pursue education, music, and sport—many representing New Zealand on the world stage.

Almost 35 years later, the Trust took the next step. In early 2023, the trustees transferred the fund to Nikau Foundation, Greater Wellington region's community foundation, ensuring its impact endures. "We wanted to make sure that the Trust's important work could continue with the same energy and passion June channeled into everything," says Diane. "Transferring the Trust to Nikau meant leaving the next chapter of June's story in a safe pair of hands."

The June Oakley Memorial Youth Fund will keep supporting young people facing hardship, helping them access opportunities to learn, grow, and succeed. Through this fund, June's legacy remains vibrant—empowering the next generation, just as she did in her lifetime.

# A new lease of life for a small trust doing great work



When Rua Stevens passed away from leukaemia, her husband Clarrie and son Lee turned their grief into something meaningful. In 1970, they established the Rua Stevens Memorial Trust determined to give back to the community that had meant so much to Rua.

What started as a small initiative has, over more than five decades, grown into what is now called the Stevens Trust—now a vital source of support for young and dynamic community organisations. Through careful investments and personal contributions from Lee, the trust has continued to provide funding to grassroots initiatives that make a tangible difference, with distributions now totalling over \$2.5 million.

In 2015 the Trust resettled with Auckland Foundation to ensure that support could be provided to our communities forever. It's a wonderful example of how a community foundation can support existing Trusts to manage succession and donor wishes in perpetuity. As generations change and the responsibilities on Trustees become more complex, the community foundation model is the perfect solution for existing Trusts to continue to support the causes and communities they were established for.

Lee sadly passed away in 2022 – always an inspiration, he absolutely walked the walk when it came to generosity. Lee leaves behind a strong legacy in the form of the Stevens Trust, which will carry on in perpetuity.

Today, Lee's wife Penny is continuing on Clarrie and Lee's work in growing Rua's legacy. In partnership with Auckland Foundation, Lee and Penny secured the trust's future, ensuring all compliance and administration is handled.



This means that Penny can now focus on what matters most—building relationships and supporting impactful projects.

The Stevens Trust has always believed in taking risks with philanthropy, knowing that while some initiatives may not work, others will thrive. They encourage supporting causes that hold personal meaning, believing that giving is most powerful when it comes from the heart. Staying local is important to them, as being able to see the impact firsthand makes their contributions even more rewarding. They are passionate about backing start-ups and small charities, knowing that funding salaries and operational costs is crucial for long-term sustainability. For them, small grants can be game-changers, making a significant difference in the right hands.

To ensure their giving remains impactful, they have entrusted Auckland Foundation with managing the details, allowing them to focus on relationships and outcomes. They value getting to know the organisations they support, listening not only to their successes but also to their challenges.

Through their generosity, Lee and Penny have ensured Rua's legacy continues—not just as a memory, but as a force for good in communities across Aotearoa.



# Oars in the water, eyes on the future



**For generations of young rowers, the name Bill Eaddy represents more than coaching—it embodies mentorship, dedication, and a passion for the sport.**

Bill and Doris Eaddy's lifelong commitment to rowing and youth development lives on through the Eaddy Junior Rowing Trust. Established in 2002 from Bill's estate, the Trust was created to support junior rowers and their coaches, ensuring that young athletes had the opportunities, mentorship, and resources they needed to thrive.

In 2023, the Trust was resettled and transferred to the Acorn Foundation in the Western Bay of Plenty, ensuring its impact would continue for years to come. Partnering with The Adastra Foundation, the scholarship programme now provides aspiring young rowers with both financial support and leadership development, helping them pursue their dreams while building character and resilience.

Bill's remarkable rowing career spanned decades, beginning in Auckland in 1924 and later influencing the Waikato and Tauranga rowing communities. As a coach, he led Tauranga Boys' College to five consecutive Maadi Cup victories and helped shape the national junior rowing programme. His philosophy extended beyond the sport: "Not only do we teach young men to be good rowers, but we teach them to be good citizens too."

Through this enduring fund, Bill and Doris' legacy continues to shape the future of rowing in New Zealand—supporting young athletes not just to excel on the water, but to grow into leaders in their communities.

# Stories of generosity



# Give

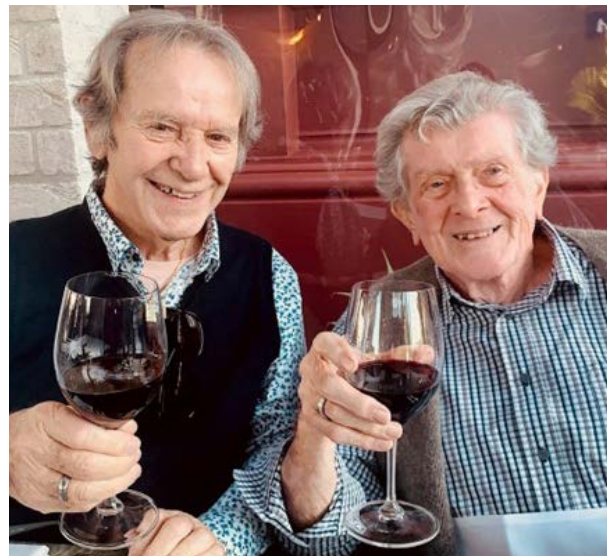
# A lifetime of love, learning, and legacy



**When Gerald Lomas and David Hartley reflected on their 64 years together, they knew they wanted to leave a lasting gift—one that would support the charities they had cherished throughout their lives in New Zealand.**

Gerry, raised near the Bristol docks, and David, growing up in Leeds during the Depression and wartime, met while serving in the Armed Forces in post-war Britain. Their bond remained unshakable until Gerry's passing in October 2023.

David's career as a chef saw him cooking for the rich and famous, running a café in Yorkshire, and later making his mark in Auckland's renowned French Café. His legendary lunches and skill with whitebait were widely admired. Gerry, a lifelong scholar and teacher, earned a Doctorate from the University of Auckland and traveled the world as a speech and drama examiner. His passions included calligraphy, theatre, and heraldry, crafting intricate coats of arms that told rich family histories.



In 2013, the passing of the Marriage Equality Act allowed them to legally commit to the partnership they had built since 1959. In retirement, they embraced a quieter life in Whakatāne.

Now, their generosity will continue through a legacy benefiting ten charities that provide vital support in the Eastern Bay. A fitting tribute to a life of love, learning, and giving.



# Personal adversity fuelling a personal legacy



**For Ashburton farmers Allan and Janette Andrews personal adversity, both of them having been deeply affected by cancer, has helped to drive their purpose.**

Allan's older brother, Lyndsay, died from leukaemia and bone marrow cancer at just 21 years of age. Lyndsay's death had a profound effect on Allan who was faced with his own challenge when he was diagnosed with acute malignant non-Hodgkin's lymphoma with bone marrow cancer as a secondary condition in 1988. At the time, Allan was given a five per cent chance of survival, but with stoic determination he defied the odds and recovered.

In 2010, Janette was then diagnosed with bowel cancer alongside liver cancer as a secondary condition. At the time Janette recalls travelling to Dunedin for treatment, "I thought to myself, I don't think I'll see Ashburton again, but when I woke in the morning and thought yes I will!" After extensive chemotherapy, Janette also made a full recovery.

Allan and Janette have both been actively involved in fundraising for the Cancer Society over the years, since they know firsthand how much support cancer patients need. Their own personal experiences have driven their purpose to create a legacy, which will have an impact on cancer patients throughout their journey.

In 2023 Allan and Janette made a significant donation, covering the cost of over 300 bed nights at Rānui House in Christchurch, for Mid Canterbury cancer patients receiving treatment. The couple have also left a gift in



their will to Advance Ashburton Community Foundation, to be invested in their own Named Fund, which will be dedicated to support cancer related causes in Mid Canterbury.

"We know that our money is going to be there forever, to help local people", said Allan. "We wanted it to stay local as we didn't want it to get lost in the larger scope of things. It stimulates me to think back over the things we've been through with cancer, it stimulated me to write a book and if I see other opportunities to help others, I will do it. Leaving a legacy with Advance Ashburton is part of that".

Janette agrees, saying, "I think it's important to help others, we know how hard it can be when people get sick, having been through it ourselves. It makes me feel good to leave a legacy and lend a hand to people, to help to give them the determination to fight."

# A lasting lens: Glen Fergusson's legacy lives on



**For decades, Glen Fergusson captured the heart of Taranaki—through his words, lens, and love for the region he called home. Even after his passing in November 2022 at 85, his passion for storytelling continues to inspire future generations through the Fergusson Fund.**

Born and raised in Taranaki, Glen's journey in journalism began when he left New Plymouth Boys' High School after Year 12. Starting as an office junior, he quickly found his calling at the Taranaki Herald, where he spent ten years before expanding his craft in photography. After a detour into sales at Tip Top Ice Cream, Glen's career came full circle when he returned to Taranaki Newspapers as Chief Photographer—a role he described as “the best job in the world” until his retirement in 1997.

In his later years, Glen often reflected on the opportunities he had been given and the value of nurturing young talent. With no children of his own, he wanted to leave a meaningful legacy. Through Taranaki Foundation, he found the perfect way to give back—establishing a fund that would support aspiring journalists and photographers in Taranaki for generations to come.

The Fergusson Fund is Glen's gift to the storytellers of tomorrow. It provides financial support to students pursuing journalism, photography and communications, ensuring that young people with talent and passion have the opportunity to follow their dreams. In partnership with Taranaki Daily the successful applicant will complete up to three weeks work placement with the Taranaki Daily News throughout the year, providing invaluable real-world experience and mentorship.

Through this fund, Glen's love for capturing life's moments and sharing stories will live on—empowering young Taranaki voices to make their mark on the world, just as he did.



# The joy of living giving



**Meeting the individual needs of students is one of the greatest challenges for educators. Thanks to Alan Goodyear and the Paul Goodyear Fund, established through the Acorn Foundation in the Western Bay of Plenty, Katikati Primary School students receive the tailored learning support they need to thrive.**

Alan, a former student of Katikati Primary, created the fund in 2017 in memory of his son Paul—a brilliant maths and science student who tragically passed away too soon after battling mental illness. Determined to honor Paul's passion for learning, Alan's fund provides ongoing support for individualised maths, reading, and science programmes, as well as a kapa haka programme that strengthens cultural connection and confidence among students.

His contributions have made a lasting impact. Principal Andrea Nicholson describes the support as transformative: “We are so grateful to Alan; he has been very generous to our school and deeply engaged in what we are doing here. He is making such a significant difference to our tamariki. Having that personal connection is very special.”

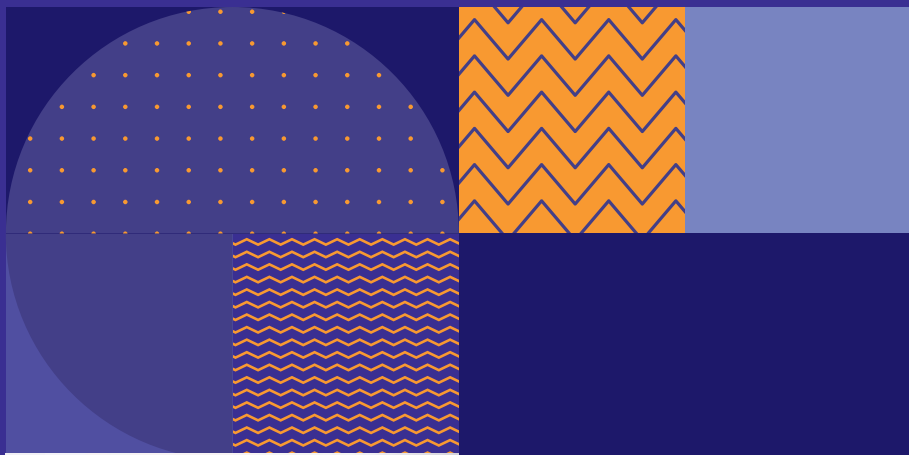
Alan regularly visits the school, personally witnessing the joy and growth his support enables. At kapa haka practice, students performed with pride, knowing the man behind their programme was watching. Photographer Alan Gibson, who captured the moment, reflected: “The absolute thrill that Alan Goodyear gets from supporting the development of tamariki in Katikati is undeniable. The kids loved having Alan watch—especially young Alex Hollows, whose intense pukana said it all.”

Alan continues to explore new ways to support the school, ensuring Paul's legacy lives on in the bright futures of Katikati's young learners. His generosity is more than financial—it's a deeply personal investment in the next generation.





# Stories of impact



# Impact

# Finding support in the dementia journey



**When David was diagnosed with early-onset dementia, his wife felt their world shift. The specialist in Wellington was blunt—there was no cure, and they needed to get their affairs in order. She walked out of his office feeling lost and alone.**

Friends and family were sympathetic, but few knew how to help. For 18 months, they managed as best they could. David left work, and the couple relocated to Timaru to be closer to their daughter. One of the first steps she took was finding a new doctor, a decision that changed everything. He immediately connected them with Alzheimers South Canterbury.

Soon after, Rosie from the Alzheimers South Canterbury team visited their home, providing much-needed guidance and reassurance. She explained the support available, regularly checked in, and encouraged David's wife to attend a carers' group. There, she met others facing similar challenges, gaining both emotional support and practical advice from guest speakers.

At the time, she was overwhelmed and struggling with depression. Today, thanks to the care and knowledge provided by Alzheimers South Canterbury, she feels stronger and better equipped to navigate the journey ahead.

Alzheimers South Canterbury received an \$8,500 grant from the South Canterbury Health Endowment Fund through Aoraki Foundation to support staff like Rosie. That funding ensures more families receive the guidance and care they need during one of life's most difficult challenges.



Dave & Raewyn



Rosie, Alzheimers South Canterbury



**Aoraki  
Foundation**

# Nurturing tomorrow's environmental leaders



**Connecting children with nature in fun and exciting ways is shaping a new generation of environmental guardians, says Ailie Suzuki, General Manager of Envirohub Marlborough.**

“Research shows that when children aged 8 to 12 develop a strong connection to nature, they carry that care into adulthood,” says Ailie. “We’ve seen this first-hand in young adults who have come through our programmes.”

Each month, Save Our Species Conservation Kids NZ (CKNZ) events give tamariki and their families hands-on experiences with Aotearoa’s wildlife. Beyond the fantastic environmental impacts, these events also provide kids with the chance to step away from screens, build

friendships, and develop a lifelong appreciation for the natural world. A ‘Species Superstar’ award is presented at each event, with an Inspiration Pack to foster ongoing conservation interest.

Thanks to a grant from Top of the South Community Foundation, these packs and event costs have been funded, ensuring more children can take part.

Recent Save Our Species events have included:

- Kotare (Kingfisher) Day at Para Wetlands
- Pekapeka (Bat) Evening at Pelorus Bridge
- Tupoupou (Hector’s Dolphin) Discovery Day in Picton
- Tuna (Eel) Awareness Event

Envirohub Marlborough’s work spans Zero Waste, Marine Health, Sustainable Communities, and Conservation Education.





# Growing a greener future - The impact of the Tūi Corridor



The Tūi Corridor is transforming Ōtautahi Christchurch and beyond, creating a thriving environment for tūi and other nectar-feeding birds. With the support of Meridian Energy and a dedicated community, the programme is restoring vital bird habitats by planting native trees in a planned corridor stretching from Christchurch to Banks Peninsula.

In the past year alone:

- 24,000 native trees were planted
- 200 volunteers joined seven community planting days
- 18 organisations & 11 public reserves received native plants

The goal is to establish an 'archipelago' of tūi-friendly habitats, filled with kōwhai and harakeke, ensuring these birds can return and thrive. Thoughtfully planned plantings provide essential food sources, helping sustain growing tūi populations and encouraging their return to urban areas.

The Christchurch Foundation developed the concept alongside a tūi expert, while Meridian Energy funded the project, led community engagement, and raised awareness about what locals can plant in their own backyards.

By restoring bird corridors and reconnecting nature with our city, the Tūi Corridor is creating lasting environmental impact, ensuring future generations can enjoy a richer, more biodiverse Christchurch.



**CHRISTCHURCH  
FOUNDATION**

# Tauawhi's path to lasting impact



The Tauawhi Men's Centre offers a vital safe space where men can receive support for family violence, addictions, and other life challenges. But like many small organisations, the Tauawhi Trust wants to ensure long-term financial security—and they see an endowment fund with The Sunrise Foundation based in Gisborne-Tairāwhiti as a great way to secure the future of their services.

"We're delighted Tauawhi has chosen to seed a fund," says Glenda Stokes, Sunrise Chief Executive Officer. "We've supported them in several projects and believe their mahi has a far-reaching positive impact in our community."

The Tauawhi team offers tailored programmes and counseling to help men navigate life's challenges. Their vision is to 'create a community of caring men,' providing a space where they're embraced with manaakitanga and supported through their change journeys.

"We look forward to our ongoing partnership with Sunrise, continuing to support the men and whānau of Te Tairāwhiti," says Tim Marshall, Tauawhi Kaihautū/Coordinator.

Through innovative peer support and community outreach, Tauawhi provides a holistic response to family harm. Tauawhi Whare Ahuru, a timeout space for men struggling to maintain a violence-free lifestyle, opened last year as part of their services.

"It's a different approach—giving men the space to change, while allowing their whānau to remain safe," says Tim.



**Sunrise Foundation**  
Local giving for local needs.

# Angels in action: giving circle makes a powerful impact



Sally's Angels Giving Circle has donated over \$50,000 to 12 charitable groups across the Western Bay of Plenty through the Acorn Foundation. Formed in 2016, the Giving Circle consists of ten local women who wanted to make a difference in their communities.

Sally Morrison, who founded the Giving Circle, says supporting local causes in this way is deeply rewarding: "We're all like-minded people, wanting to do something positive together. Our modest monthly donations have added up to \$50,000, showing the power of collective giving."

This year, the Angels chose to split their donation between two food security charities: Tauranga Community Foodbank and Good Neighbour Aotearoa Trust. Nicki Goodwin, Manager of the Foodbank, says the donation is invaluable: "The rising cost of living has increased demand for our services. This donation will help us provide nutritious food to those in need."

With more than 2,500 Giving Circles worldwide, Sally and her Angels' contribution is a powerful example of how collective giving expands social networks and amplifies impact.



The members of Sally's Angels Giving Circle in the Western Bay of Plenty

*For more information on Giving Circles see page 54*



# Uniting for a greener future



**“We take out the overwhelm so they can get on with the work,” says Wairarapa Pūkaha (WaiP2K) to Kawakawa Alliance General Manager Esther Dijkstra.**

Established in 2021, WaiP2K brings people together from Mount Bruce to Cape Palliser, igniting a wave of local volunteers passionate about environmental conservation. By handling vital behind-the-scenes tasks like funding applications and advocacy, WaiP2K allows hands-on projects—planting native trees, restoring streams, and protecting species—to thrive. This community-driven model eases volunteer fatigue and channels energy where it matters most: on the ground, making a real difference.

Collaborating with over 50 local community groups, including mana whenua, regional councils, and conservation initiatives like Wairarapa Dark Sky and Aorangi Restoration Trust, WaiP2K creates a collaborative space to share resources and build collective strength. “The environmental challenges our region faces are immense, but through connecting and building our capability as a collective, we are working smarter to address them,” says Esther.

A standout initiative is the Predator Free programme in Masterton, backed by a grant from Nikau Foundation’s Roy and Jan Mace Fund. The programme empowers local communities to take charge of pest control, restoring urban green spaces. With passion and collaboration, WaiP2K is helping Masterton’s green spaces flourish, one neighbourhood at a time.



Image credit: Rebecca Jamieson

# A lifeline for those in need



**A recurring conversation at Sunrise Foundation is whether those in greatest need—the often-forgotten members of the community—are receiving the right support. Oasis Community Shelter is ensuring that they do.**

Before COVID, Oasis reached out to men that other agencies were unable to assist, offering them accommodation and support. While officially funded for ten men, the shelter has consistently helped many more. Manager Lizz Crawford explains that residents must follow the shelter's kaupapa (rules), but staying is always their choice. Those who do receive meals, facilities, navigation services, and faith-based support. For those

who choose to leave, the shelter still provides a daily cooked breakfast for people living on the streets.

“When some of the men reconnect with their whānau, secure jobs, or move into their own homes, it is incredibly rewarding,” says Lizz. “Some stay long-term, and that’s ok too.”

As the local funding manager for The Tindall Foundation, Sunrise Foundation provided a \$15,802 grant to help fund a critical kitchen upgrade, doubling its size and adding a much-needed kai storeroom. An additional \$7,430 grant was awarded to cover essential water filtration and grease trap expenses, necessary for securing council consent.

Oasis has ambitious plans for the future, including building ten transitional homes on-site to help residents take the next step toward independent living. Through its unwavering commitment, the shelter continues to transform lives, offering not just a place to stay, but a pathway to a better future.



**Sunrise  
Foundation**  
Local giving for local needs.



# Cultivating kaitiaki: WithIN NATURE's vision for regeneration

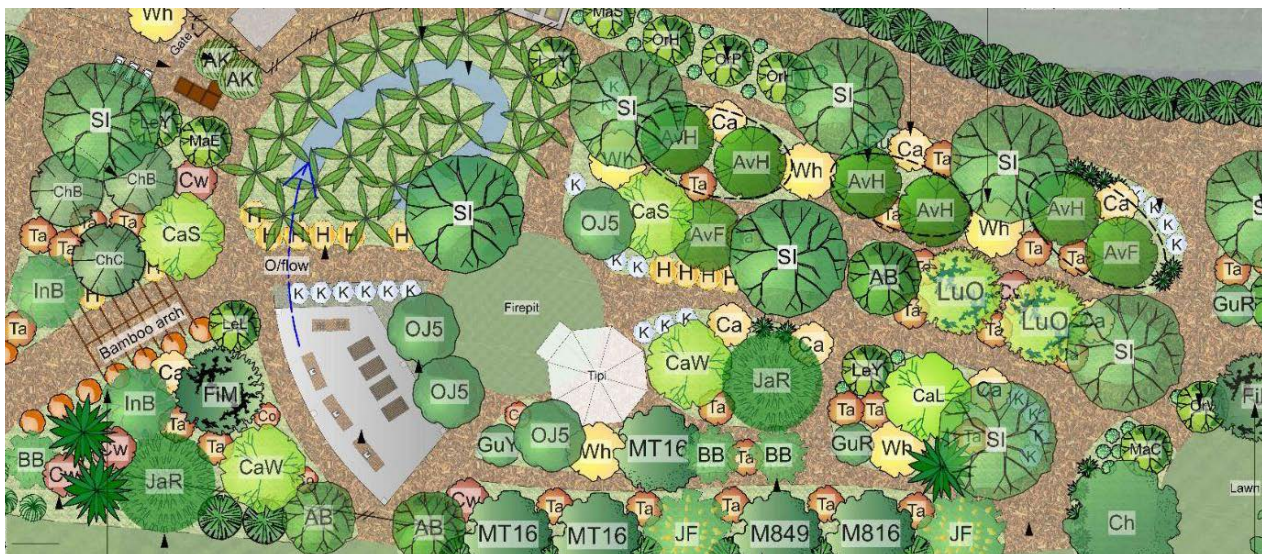


In July, Northland Community Foundation awarded WithIN NATURE a \$14,540 grant from the Northland Grassroots Fund to support their mission of transforming environmental paradigms and fostering kaitiakitanga through ecosystem regeneration.

Working in partnership with Iwi, Marae, and the local community, WithIN NATURE integrates Te Ao Māori frameworks and indigenous knowledge into their environmental initiatives.

A key focus is the creation of a professionally designed one-acre food forest, where rangatahi will learn to combine Maramataka—the Māori lunar calendar—with Māra kai, the traditional practice of food cultivation. This initiative preserves and passes down Māori knowledge of growing, preparing, and consuming food while promoting sustainability and cultural connection.

By engaging rangatahi, WithIN NATURE is addressing the challenges faced by Northland's youth, instilling a deep respect for the land, and inspiring a future where regeneration takes priority over exploitation. Their work nurtures a sense of belonging, environmental stewardship, and a lasting love for place.







# The power of collective women's giving

**International Women's Day is marked on 8th March, and this year we honoured the day by exploring ways that women are leading the charge in collective forms of giving.**

Giving circles offer immense opportunities to empower new types of giving, and across the planet we see them empowering women's giving, in particular.

I don't know a more mighty way to explain giving circles than the one put forward by Sara Lomelin in her TED talk - "It's what I know philanthropy to be: it's joyful, transformative, collaborative and intentional" (seriously, google it but warning - you'll love it, it'll be the best 13 minutes you spend today).

Giving circles are joyful, transformative, collaborative and intentional, and they are a way to activate local resources and to connect people - the doers and the givers - together. They share decision-making and they can build on the collective - money, people, connections and ideas - of the community.

Community foundations across Aotearoa NZ run giving circles, and, interestingly, all of them are women's giving circles. Wakatipu Community Foundation run a women's giving circle called 'Impact100', where 100 women give \$1,000 annually and decide collectively where the funding goes. Over 200 women have signed up and, collectively over the past few years, they have given \$700k to a range of causes including community health & wellbeing, environment and education. Eastern Bay Community Foundation's Impact100 model also involves over 100 participants, a group which most recently chose to invest in the maternal mental health of isolated rural mothers across the Eastern Bay of Plenty, activating local giving to fund a defined local need.

Women's Funds are also active at Auckland Foundation, Momentum Waikato Community Foundation, The Christchurch Foundation and Aoraki Foundation in South Canterbury, and these are essentially collective giving circles, often with a long-term invested endowment aspect. Giving from these funds is focused on areas that will activate empowerment for women and girls: some examples include supporting Māori and Pasifika women into healthcare roles, addressing period poverty, support and advocacy for wāhine, tamariki and whānau experiencing family violence, post-natal and mental health support services and scholarships to develop female leaders in our communities.

Acorn Foundation, in the Western Bay of Plenty, run a number of giving circles (which they term 'give with friends') and they provide advice on impactful areas to donate the money to. Honeybadgers is a group of 12 women from Mt Maunganui who give collectively and utilise the insights from Acorn Foundation to guide their giving, most recently into the areas of child and youth development, mental health and adolescent suicide prevention. Collectively, the Honeybadgers have now donated an impressive \$30k to 11 local charities doing life-changing mahi in the Bay of Plenty.

There is something really different about collective and democratised giving, such as giving circles. As Lomelin says, "When we shift the power of philanthropy into the collective voice we change who gives, how we give, and ultimately, what gets funded. Giving by, for and with the communities we represent, is the future of philanthropy".

At Community Foundations of Aotearoa NZ we want to say thank you to all the joyful, transformative, collaborative and intentional wāhine who are collectively giving to transform their communities, ngā manaakitanga.

**By Eleanor Cater**



**Community  
Foundations**  
*of Aotearoa NZ*

Hei whakakaha i ngā  
hāpori o Aotearoa

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