



**J R MCKENZIE TRUST**

1940-2015

**75TH ANNIVERSARY**

HONOURING A LEGACY  
CELEBRATING ACHIEVEMENT  
LOOKING TO THE FUTURE

# ANNUAL REPORT

Pūrongo Pūtea a Tau

# 2015



*J R McKenzie (1876–1955) and Lady McKenzie*

## For more information...

### Kia whai māramatanga anō ...

- About applying for a grant
- Audited accounts 2014–15
- Rangatira Limited Annual Report

Visit our website: [www.jrmckenzie.org.nz](http://www.jrmckenzie.org.nz)

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Cover: A Living Wage cleaner (see page 10).





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## Welcome — Nau mai

**E**ngā mana, e ngā reo, e ngā karangatanga maha, tēnā koutou katoa i runga i ngā āhuatanga o te wā. All authorities, all voices, greetings to you all.

Talofa lava, Fakalofa lahi atu, Malo e lelei, Ni sa bula vinaka, Kia orana, Waa nabad, As-Salāmu 'Alaykum, Ni hao.

The J R McKenzie Trust is a gift to New Zealand from one of New Zealand's generous families – Sir John and Lady May McKenzie and their descendants.

Sir John McKenzie established the Trust 75 years ago in 1940, giving away a third of the profits from his successful nationwide chain of department stores, McKenzies. Sir John's son Sir Roy greatly increased the

Trust's size and vigour, set up several other charities, and was a major figure in New Zealand philanthropy until his death in 2007. Roy and Lady Shirley's children Peter and John McKenzie also contributed to the Trust's work over many years. Currently the family is represented on the Board by cousin David Vance, and Chris McKenzie, a great-grandson of the founder.

Today the Trust's vision is:

“A socially just and inclusive Aotearoa New Zealand”

“Kia hua mai he whenua ka toko i te tika me te pono hei korowai mō Aotearoa.”

Our main focuses are Disadvantaged Children and their Families, and Māori Development.

Rotary has been a major contributor to the Trust from the beginning. Six Trustees are appointed by Rotary, which also provides many of our volunteers around the country. Other volunteers and Trustees bring knowledge of the fields in which we work.

The Deaf Development Fund makes grants to organisations and individuals contributing to the development of the Deaf community.

Ānei tō mātou whakataukī: Here is a proverb the Trust has adopted:

“Iti noa ana, he pito mata”.

“With care, a small kūmara will produce a harvest”.



### FORMER AND CURRENT TRUSTEES AT 75TH ANNIVERSARY DINNER

From left to right, back row: David Vance, Diana Crossan, Jonathan Usher, Tricia Walbridge, Chris McKenzie, Lyn Holmes, David Hurley, Radha Balakrishnan, Peter Holst, Liz Tanielu, Neville Caird. Front row: Charles Wilson, Warren Lindberg, Lesley Carmichael, Joan Smith, Jenny Gill, Patrick Cummings, (current Chair), Pania Ellison, Manaia King, Che Wilson, Eric Keys.



# Chair's report 2015 — Pūrongo a te Tumuaki 2015

Based on the Chair's speech at the 75th Anniversary dinner at Parliament, 18 November.



**E**ngā iwi, e ngā reo,  
e ngā karangatanga  
maha

**Ngā mihi maioha ki a  
koutou katoa**

This evening is a celebration of 75 years of the J R McKenzie Trust — tonight we will be honoring a legacy, celebrating achievement and looking to the future.

We'll start with where it all began. The McKenzies store — I remember it well — it was in Jackson Street, Petone, my home town, and I remember shopping there when I was a kid, a long long time ago! Those of you of a certain age will remember that there was a McKenzies store in practically every town in New Zealand.

The J R McKenzie Trust has a long and proud history of helping to build stronger communities in New Zealand. Over the past 75 years, the Trust has given more than \$83 million to support New Zealanders in need.

The vision of the Trust is for a socially just and inclusive New Zealand. Our focus today is specifically on Māori Development, disadvantaged children and their families, and social justice. We also support work with, and for other groups at high risk of exclusion. We want to contribute to long-term change.

In 2014, the Trust proudly received the International Funders for Indigenous Peoples Award, created to encourage donors to fund indigenous communities worldwide — this was the first time that a New Zealand

Trust had won this award.

Over the decades the Trust has been an early supporter of many of what are now New Zealand's leading community organisations — groups such as Women's Refuge, People First, CCS Disability Action, the Stroke Foundation, Rape Crisis and Age Concern. Although the Trust's focus is different now and perhaps less relevant to some of the organisations we supported in the past, we are still very proud of our small contribution to their success.

All of the organisations we have had the privilege of working with are doing amazing things in their communities. Many of them are represented here tonight and you'll hear from some of them later.

Sir John McKenzie's strong personal belief in providing assistance to people in need was based on his own humble origins and his desire 'to give something back'. This remained constant throughout his life and the lives of the McKenzie generations to come.

As current stewards of the McKenzie legacy of generosity, we all do our best to maintain the excellent standards of our predecessors. We look to the past for our values, and to the present and future for where we can contribute.

Our role is to encourage the debate and to try and lift people's gaze about an issue.

As a Trust we have three particular issues in our line of sight:

- We want to substantially reduce **child and family poverty**.
- We want to see a growing focus on **Māori development** — there are opportunities to do so much more in this area.

- We want to see a decrease in **inequalities and social injustices** that sadly still exist.

There is a lot of work already underway. But we need to build on that, and do more. We need the collective effort of everyone from around the country.

So that's my challenge to you all — what can you do to help? Something to contemplate....

Nō reira, tēnā koutou, tēnā koutou, tēnā tātou katoa

*Patrick Cummings, Chair*

## Iain Hines honoured with Paul Harris Fellowship

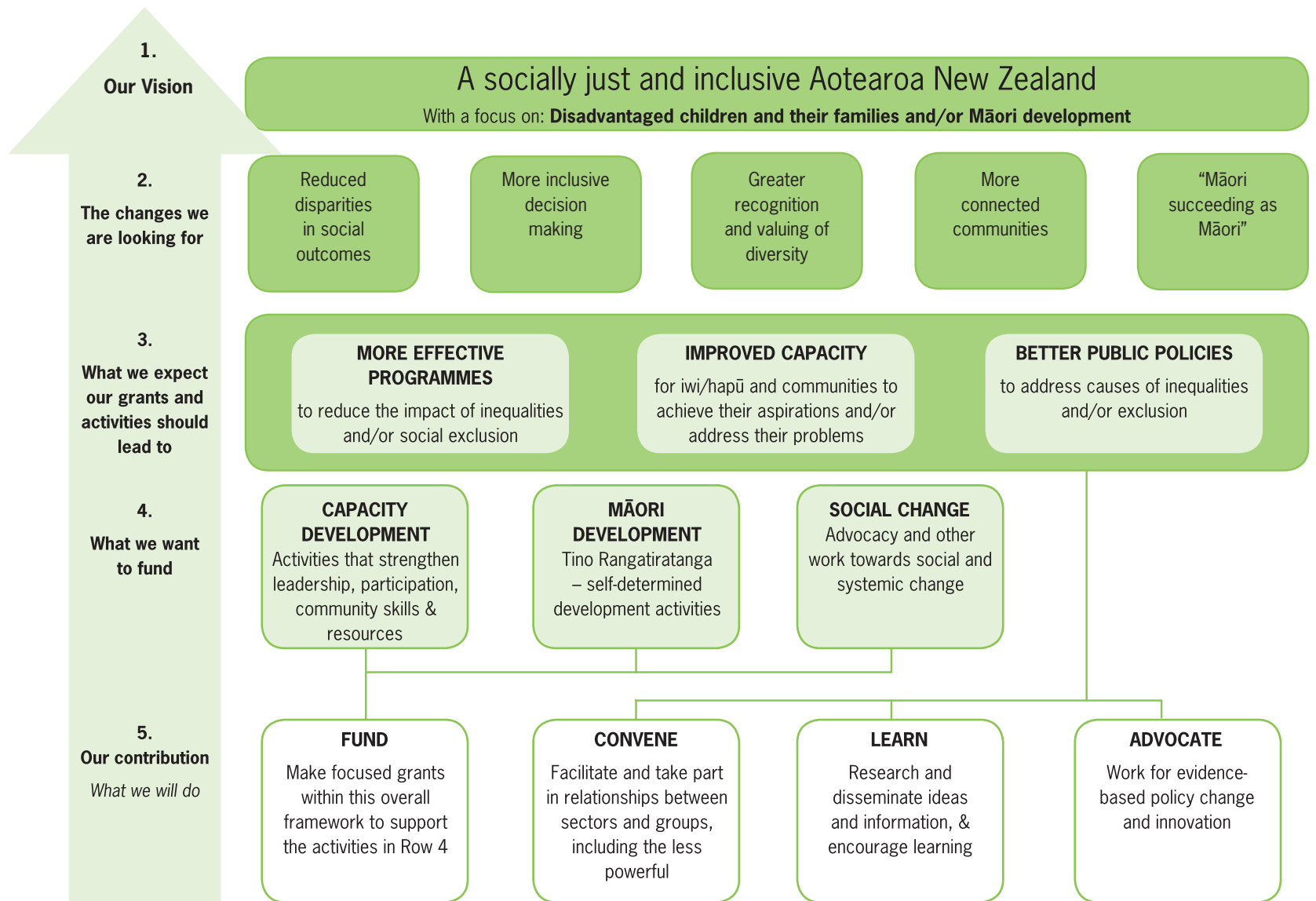
Following the 75th anniversary dinner, a special award was given to Iain Hines who has been the Executive Director of the J R McKenzie Trust for 18 years. The Paul Harris Fellowship is awarded by Rotary for service to the community.

*J R McKenzie Trust Chair Patrick Cummings (right) presents a Paul Harris Fellowship to Iain Hines.*



# Our strategy 2015–2020 — Tō mātou rautaki

This diagram is a summary of our five-year plan. It shows the connections that we believe link what we do (Row 5, at the bottom) with the vision that we hope to contribute to (Row 1). Row 4 may be of particular interest to groups seeking a grant: it shows the areas the trust is keen to support.





# Te Kāwai Toro — ‘the shoot that reaches out’

The Te Kāwai Toro (TKT) Committee was established by the J R McKenzie (JRM) Trust in 2003, in response to a strategic review which identified the under-representation of Māori in the Trust’s philanthropic activities.

One of the key roles of TKT is to **lead proactive work on Māori development.**

TKT commissioned Berl Economics to carry out a survey to identify who in the philanthropic sector fund Māori. The Report was launched, December 2014.

## Findings

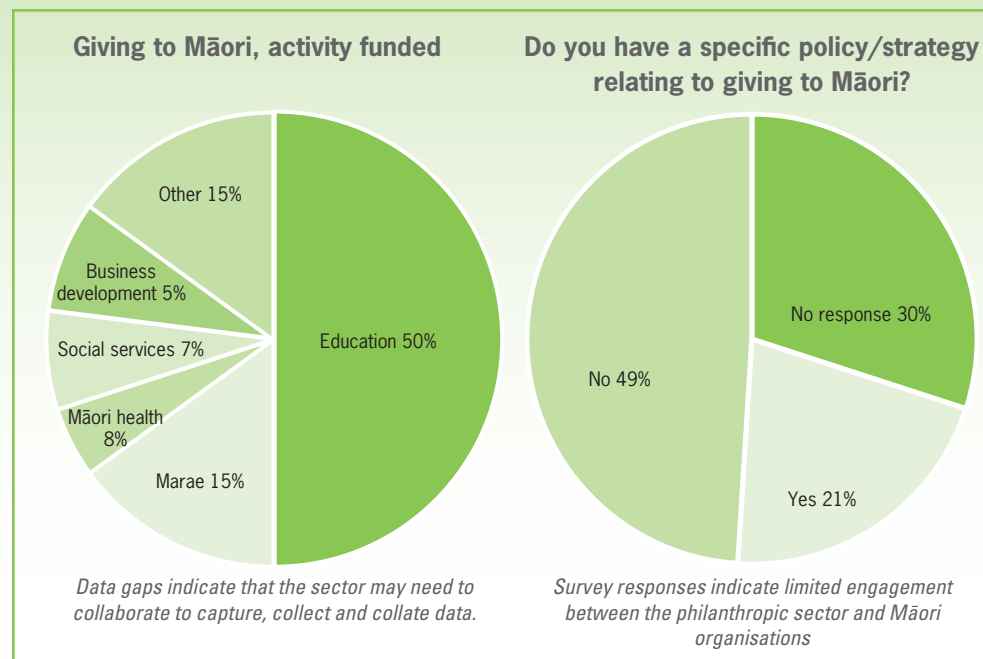
- Out of **8,356** survey invites, **1,285** were funders, **108** valid submissions received
- The remaining 7,071 were grant recipients of which **484** valid submissions were received.

Data gaps indicate that the sector may need to collaborate to capture, collect and collate data.

Survey responses indicate limited engagement between the philanthropic sector and Māori organisations

Consequently, a case exists that philanthropic funding to Māori organisations does not fare well when measured against relative need and the development aspirations of Māori

As a direct result of this report, TKT are developing initiatives to attract and improve funding to Māori.



### TKT goals and objectives

**Ultimate Aim**  
A better Aotearoa/  
New Zealand

**Intermediate Goal**  
Improve philanthropic  
sector’s contribution  
to Māori  
Development

**Goal**  
Improved outcomes  
for Māori

*As a direct result of this report, TKT are developing initiatives to attract and improve funding to Māori.*

In Sept. 2014, we were humbled to receive the International Funders for Indigenous Peoples (IFIP) Award, acknowledging support of Māori self-determined development.

*Photo: Evelyn Arce, Manaia King and Mereana Selby receiving the IFIP Award 2014 in New York.*

# Connecting education and communities — Better educational outcomes

Whilst most of our funds are distributed in response to applications, in recent years the Trust has set aside some of its resources to work proactively – to focus on a certain issue and address this in a variety of ways, of which grant making is only one.

Following an initial survey of the issues affecting children and young people in New Zealand in 2010, approximately \$1.5 million over five years was set aside for proactive work around the theme of **Connecting Education and Communities**.

One of several ways this work has been undertaken is through support for innovative, ‘on-the-ground’ work in a small number of communities and during 2015, seven different initiatives were being funded:

## Horowhenua Pasifika Education Initiative (HPEI) Levin



HPEI is an initiative in Levin that focuses on engaging hard-to-reach Pasifika families in their children’s early childhood education (ECE) and transition to school. The initiative employs two coordinators, from the Tongan and Samoan communities, to provide support for families to help them make informed decisions and help their children experience ongoing success in education.

## Te Huarahi Trust: A partnership of schools in Pukekohe



Te Huarahi, a partnership of schools in Pukekohe, has an overarching vision of “schools and whānau working together to improve educational outcomes for Māori”. The project has five primary goals, centred around early childhood education (ECE), whānau education, celebrating

success, building authentic relationships and raising achievement.

## Success for Little People, Waitakere



The long-term goal of the Success For Little People initiative is to ensure that all five-year-olds are enrolled in and ready for school, attending every day, and are supported by their families. The programme works to bring early learning into the home through existing organisations within the Waitakere area, building cross-community collaborations and sharing knowledge with wider community organisations and areas.

## Raurimu Avenue School, Whangarei



The Trust supports Raurimu Avenue School in Whāngarei in its aim to use a whānau concept to promote learning, leadership, health, action, sharing, pride, entrepreneurship, and guardianship in its community. A Kaiārahi/liaison worker supports parents to become more involved in their children’s learning.

## Te Waka Unua School, Christchurch



The merger of Woolston and Phillipstown schools into Te Waka Unua school presents some unique challenges and opportunities in terms of parent engagement in the new school community. The Trust is supporting a community engagement coordinator to build relationships with parents to encourage their engagement with their children’s learning and the new school.

## Waimate Cluster, Waimate



The Trust is supporting three schools in the Waimate (South Canterbury) area to employ a Whānau Support Person for 10 hours per week for 40 weeks per year to support schools in the Waimate District to fully engage with some of the more ‘at risk’ parents. The role will build relationships, provide support in educational settings (e.g. support at meetings), and give advice on school-related issues.

## Ruakaka School, Ruakaka



Ruakaka School believes that partnership with whānau is vital to improve the educational outcomes for tamariki and is a key factor in relationships within the learning community. The Trust is funding the role of a kaiarahi (guide, escort, counsellor, conductor, leader, mentor) so the relationships between the school and whānau can be further strengthened.

*“Building whānau and family engagement to support better educational outcomes”*





## Mobilise and connect — Ethnic youth leadership for social change

**A**mongst the younger generation in Auckland, there is growing ethnic diversity with migrants from Asian, Middle Eastern and African countries seeking a better life. Issues in immigrant communities are often hidden and difficult to talk about, especially family and domestic violence, which is often normalized in many cultures.

In Sanskrit, Shakti means strength or power. **Shakti Youth** is a unit that was set up in 2010 to address issues of family violence faced by Asian, Middle Eastern and African youth. We are a collective of young people who are striving for social change to end gender-based violence and oppression and raise the voice and experience of culturally diverse youth.

This year, **Shakti Youth** mobilised students from various schools who participated and came up with their own ideas for projects to raise awareness about family violence. With support from JR McKenzie Trust we were able to reach out to youth from 30 different ethnic groups in 12 different high schools across the greater Auckland region. We have now also set up Shakti Youth groups in Central, South and West Auckland schools who meet regularly and are excited to continue next year.

The outcome of this project is that students from diverse ethnic backgrounds now have greater opportunities to connect with each other as well as older youth, in a space that gives value to their cultures and experiences. A youth leadership training curriculum has also been developed to provide culturally appropriate leadership tools for youth to be social justice leaders.



*“In Sanskrit, Shakti means strength or power. Shakti Youth is a unit that was set up in 2010 to address issues of family violence faced by Asian, Middle Eastern and African youth.”*



## Mana Tāne Ora o Aotearoa — “What gets measured gets done”

**M**āori men fare poorly compared with other New Zealanders on a number of health indicators. Unfortunately it's of no surprise that the death rate for Māori males is approximately twice that of non-Māori males. Leading causes of death for Māori men include cardiovascular disease, cancer, diabetes and respiratory disease.

The development of a Māori Men's health indicator tool is one of three projects currently being undertaken by **Mana Tāne Ora o Aotearoa** with the support of JR McKenzie Trust.

Indicators are being used widely throughout health and social services in both private and public organisations. Mana Tāne Ora seeks to achieve improvements in Māori men's health by developing a focal set of indicators linked to Māori men's health as well as an online measurement tool.

This critical piece of work is spearheaded by Dr George Gray, a Public Health Physician who has already received kudos this year for developing a new web-based monitoring tool which seeks to speed up Māori health gains by monitoring comparisons of the performances of all 20 DHBs on 16 Māori health indicators.

A set of indicators related to Māori men's health will include measures which lie primarily within the health sector, but will also include measures which flow upstream from health. In keeping with social ecological models it is clear that the majority of health outcomes for Māori have their origins in social determinants which lie outside the health sector. Addressing these measures has the potential for long-term intergenerational change.

Mana Tāne Ora o Aotearoa, the National Māori Men's Health Coalition was formed in 2010 and its inception

was underpinned by a call for a proactive response to the relatively poor health statistics and lower life expectancy of Māori men, and the need for nationally networked approaches and strategies to address the health and social issues of Māori men in Aotearoa.

In addition to developing the Indicator tool, Mana Tāne Ora o Aotearoa is also engaged in strengthening regional leadership with regards to Tāne Ora and preparations for a third national conference to be held in Blenheim 9–11 March 2016 are well underway.



*“Tāne Tū, Tāne Kaha, Tāne Ora —  
The man who stands tall and proud,  
strong in body and soul enhances a  
long and health lifestyle.”*



# The Living Wage Movement — building a just society

**H**ow do we build a united voice across civil society around our common aspirations? Around New Zealand organisations are challenged by the impact of growing poverty and inequality on workers, their families and their communities.

The Living Wage Movement's community organisers in Auckland and Wellington are providing a critical role facilitating a conversation about the shared concerns of groups. These include those representing migrants, New Zealanders from refugee background, unions, women, churches, and marae. These community organisers, supported by the J R McKenzie Trust, are a catalyst in the growth of a new broad-based movement that aims to revitalise democratic participation by bringing together diverse communities in action that make a difference.

With 40% of disadvantaged children living in households where at least one adult is in full time work or self-

employed it is timely to debate the standards necessary for people in work to live decent lives. It is equally important that communities are able to build a just society together with the confidence that their voices will be heard. The living wage, currently \$19.25 per hour, is voluntary and the organisations that form the movement focus their energy on public institutions accountable for public funds. This has paid dividends in Wellington with elected city councillors voting in 2015 to move all directly employed and contracted workers toward a living wage. The living wage is uniting students, workers and academics at Victoria University, as well as the workers residents and Point Chevalier communities at the Anglican aged care facilities of Selwyn Foundation in Auckland.

Already workers embracing this concept describe the transformative power of the living wage:

*"It did make a big impact in my family... now you're not so*

*stressed out about thinking about what you have to pay [for] and what you have to do with your little money; it's not like heaps of money but [it is] a big change in my household."*

An employer surveyed following the announcement of the 2014 Living Wage Employers said:

*"If you want people to stay and work as hard as they can and be loyal, pay them a living wage. It's economically smart, in the long run you'll save yourself more money as an employer..."*



\*These two quotes are from *The Difference a Living Wage Makes* available at [www.livingwage.org.nz](http://www.livingwage.org.nz)

*"If you want people to stay and work as hard as they can and be loyal, pay them a living wage. It's economically smart, in the long run you'll save yourself more money as an employer..."*





# Te Ara Tika o te Whānau Trust — Inspired to pursue their dreams

**T**e Ara Tika o te Whānau Trust is committed to supporting hard to reach youth and their whānau who have a desire to exchange destructive behaviours, such as indulgence in addictive substances, to focusing on becoming free of addictions and creating a safe environment for their whānau.

Our project has focused on supporting those first steps alongside youth and whānau creating opportunities for learning in education, health and business opportunities.

Youth are our major focus, as we recognise years of anti-social behaviour amongst their parents has often transferred to the next generation.

Our youth are now completing High School, continuing on to tertiary education, achieving their trade certificates in motor and panel repairs and have created a training workshop for like-minded youth with similar backgrounds. In particular, one of our youth followed this path and led the way towards a different future.

Parents and youth are sitting side by side in driver licence workshops to gain their driver licences which has reduced driving recidivism; or engaging in Kapa Haka together as a whānau and embracing the learning of Tikanga.

While other people in different communities see these activities as “normal”, in our community the choice to walk the journey towards normal, for many, is a long road.



Tommy Epiha & Te Maia Te Nahu at the Fun Day



**A TRIBUTE:** We take this opportunity to acknowledge one of our youth that journeyed amongst us, the ‘apple of his father’s eye’ who captured his father’s vision of a new way of doing things, and followed the direction his father set for him, which was to view the world through a different lens. His world view led him to all the things he aspired to be, until he tragically left us. He left us with his dream to fulfil on his behalf that others like him might understand his journey and be inspired to pursue their dreams.



Graduation: Parents receiving their certificates

*“While other people in different communities see these activities as “normal”, in our community the choice to walk the journey towards normal, for many, is a long road.”*



# Microfinance for the people — Safe, fair, and affordable

Loan capital provided by Kiwibank allows Ngā Tangata Microfinance Trust (NTM) to offer two loan products with no interest, fees or security.

NILS® assists with family asset building and well-being while DRLS is for relief from high interest debt, including debt consolidation. Ngā Tangata values the relationship between clients and their budgeting adviser, with financial education alongside the provision of loans, considered important.

Jerry's story started with a debt to a fringe lender and a financial crisis, as it typically does for many clients on Work and Income support. The availability of a DRLS loan was a beacon of hope, enabling the budgeter to set up a viable plan with Jerry's creditors, to get him through the crisis. When the NTM loan of \$1,354 was granted, reliance on foodbanks was reduced and other debt could be consistently repaid. After 2 years, the DRLS loan was fully repaid along with \$8,000 of other debt. Jerry has just successfully applied for a NILS loan to repair the family car, and purchase other needed items for the house. He won't return to the fringe lenders.

Funding from J R McKenzie Trust in 2015 has allowed NTM to expand the availability of loans to Northland, Waikato, Bay of Plenty, Manawatu, Taranaki, Dunedin and wider Auckland, with MoUs signed with 24 Budgeting Services. NTM also provides access to loans to clients of social service agencies working in the areas of family and child support, housing, and health, and to low waged workers from a national organisation providing home care support for the aged and disabled.



*“Ngā Tangata values the relationship between clients and their budgeting adviser, with financial education alongside the provision of loans, considered important.”*



## Marae life — committed to ensuring our marae are vibrant and sustainable

**M**arae are the heartbeat and safehaven of our whānau. They provide a gathering place to celebrate special occasions in our lives, and to farewell loved ones during times of sorrow. They are also a forum for our people to hui and discuss issues, as well as learning centres to wānanga and share knowledge.

**Toitū Ngāti Porou** (Toitū) and **Te Rūnanganui o Ngāti Porou** (TRONP) are committed to ensuring our marae continue to become more vibrant and sustainable. In October 2014, Leeanne Morice was appointed to the Kaitakawaenga position. A key part of the role is to support the vision for marae to be thriving, fully functioning, hapū-centred institutions that provide the physical and cultural facilities for whānau, hapū and communities to gather, celebrate, share, learn and continue to maintain ngā tikanga o mātau tīpuna.

### 2015 Ngāti Porou Inter-Marae Sports Festival (Pā Wars)

Twenty marae from across the Ngāti Porou rohe celebrated the 20th anniversary of the Ngāti Porou Inter-Marae Sports Festival in Ruatoria over the New Year.



#### Nati Power

Nati Power was a Toitū Ngāti Porou initiative which generated private sector revenue, towards powering up the marae of Ngāti Porou. The pilot scheme involved Te Rūnanganui o Ngāti Porou and Contact Energy joining together

to create a customer loyalty programme. Alongside the promotion, was a Nati Power Pā Wars competition. Hiruhārama Marae won the top prize donated by Contact Energy as they recruited the most Nati Power customers.

#### Wifi (Wai Whai) Nati

Having internet coverage at our marae has long been a desire of many of our marae whānau and hapū members. There are 48 marae across Ngāti Porou with varying degrees of functionality, and a large number are capable of supporting internet services. Over the past year the Wifi Nati project has focused on connecting 39 of our 48 marae.

#### Nati Insure

At the 2013 TRONP AGM a key area whānau sought Toitū's support for development of a competitive marae insurance package. In November 2014, TRONPnui and Toitū NP, in partnership with Aon New Zealand, launched Nati Insure at Pākirikiri Marae. Nati Insure supports Ngāti Porou whānau and hapū to future-proof their marae by purchasing improved insurance coverage products at competitive prices, leveraged off our combined purchasing power.

To date, 23 marae insurance valuations have been conducted and insurance quotations for these marae are in the pipeline.



*“[Marae] are ... a forum for our people to hui and discuss issues... [and] learning centres to wānanga and share knowledge.”*



## ACYA — Lobbying for the rights of children and young people

It has been an eventful year for **Action for Children and Youth Aotearoa (ACYA)** co-ordinating the preparation of an 'umbrella' NGO Alternative Report to the United Nations Committee for the Rights of the Child (UNCROC).

This was lodged with the Committee for the Rights of the Child in Geneva in early November. Consultations with NGO members related to ACYA on the various subjects provided valuable contributions. Further working papers are being developed in the following areas: Health, Disability, Children in Care and Article 12. We are supporting UNICEF NZ and Save the Children to undertake a nationwide consultation with children and young people about their rights.

In late October 2015 the draft report was discussed at an all day workshop in Wellington, with Deborah Morris-Travers of UNICEF and Amanda D'Souza (Otago University's Department of Public Health) also participating. Then an editing team, including several members of the ACYA Steering Committee, took over. To our delight, Elliot, the four year old son of Vanushi Walters of the Steering Committee, produced a wonderful painting that graces the title page of our 52 page report.

ACYA continues to be involved in research concerned with the rights of children. In particular is work in the following areas: Indigenous people, family environment and alternative care, standard of living and poverty, health, disabled children, education from early childhood to secondary, youth justice, and refugee children. The impact of climate change on children is also of concern.



Above: Members of ACYA reviewing the latest UNCROC report, left to right, Andrea Jamison, Mereana Ruri, John Waldon, Sarah Te One, Barbara Lambourne.

Left: Elliot's picture for the UNCROC Alternative Report.



# Te Whare Hukahuka – Supported by, The Icehouse Business Growth Hub

**T**e Whare Hukahuka exists to enhance and empower Māori communities to be more effective. An education organisation founded with a rebellious spirit, a can-do attitude, a lofty objective, and a strong belief that by empowering leaders, whole communities can flourish.

The team has assisted over 500 Māori leaders and over 85 Māori trusts to enhance their performance, themselves and therefore their communities.

Te Whare Hukahuka constantly looks to raise the bar, offer innovative approaches, and appreciate the insight gained from the privilege to do what it does.

“We liked that they were Māori. That was really important for us as a Māori organisation and not just a commercial entity”, says Brenda Tahi of Tūhoe Tuawhenua Trust.

The team has helped this trust drive their entrepreneurial Manawa Honey business via strong networks and connections, expertise, and various coaching and innovation sessions.

“Before we engaged with Te Whare and The Icehouse, we had our land leased out. We had an idea of where we wanted to go but the destination wasn’t clear, and obviously there were some boundaries that we hadn’t thought of. The training workshop, strategy support, mentoring and wrap-around support have provided lots of benefits. Now we’ve got real clarity, a map, we’ve got instructions so we can move forward as a trust – and we have done just that!” says Rāwiri Bhana of Waiteti Farms Ltd.

Te Whare Hukahuka enables indigenous organisations to be more effective with programmes to manage risk and growth, governance training, strategy development, strategic execution and commercial advice.



# Organisations which we are currently supporting — Ko ngā takoha āwhina kua tukuna a

Dollars show the total amount committed to the organisation under our current funding agreement

## 2015 grants

<b>ACTION FOR CHILDREN AND YOUTH AOTEAROA ACYA</b> , advocacy to maximise government compliance with UN Convention on the Rights of the Child – operating and project costs, Year 5 of 5	\$100,000
<b>ACTIONSTATION AOTEAROA LTD</b> , campaigns to mobilise New Zealanders to become powerful advocates to eliminate whānau poverty, Year 1 of 3	\$180,000
<b>AUCKLAND REFUGEE COUNCIL INC</b> trading as Asylum Seeker Support Trust, to advocate for the rights of asylum seekers and convention refugees, Year 2 of 3	\$144,000
<b>AUCKLAND REGIONAL MIGRANT SERVICES CHARITABLE TRUST</b> , to facilitate ARMS' social enterprise activities with refugee and migrant women, Year 3 of 3	\$278,782
<b>BRAINWAVE TRUST AOTEAROA</b> , develop a fathering campaign for Māori fathers, Year 2 of 2	\$20,000
<b>CAMPAIGN TO MAKE WELLINGTON THE BEST PLACE TO RAISE A FAMILY</b> , feasibility study for a child wellbeing-focused collective impact initiative in Wellington, Year 1 of 1	\$10,000
<b>CENTRE FOR NEW ZEALAND PROGRESS</b> , Step It Up – two events as part of a movement building strategy, Year 1 of 1	\$20,000
<b>CHILD POVERTY ACTION GROUP</b> , to fund salaries of the Executive Officer, Researcher and Communications Officer, Year 2 of 3	\$300,000
<b>COMMUNITY LAW CENTRES AOTEAROA</b> , to consult nationally about the vision and process of the Community Justice Panel to facilitate community justice throughout New Zealand, Year 1 of 1	\$30,000
<b>CONSTITUTIONAL TRANSFORMATION WORKING GROUP FOR IWI CHAIRS GROUP</b> , to hold another 10-12 hui to complete a model constitution and develop an implementation strategy, Year 1 of 1	\$130,000

<b>EQUALITY NETWORK</b> , to employ/contract part-time website manager and networker, managed by NZCCSS, Year 1 of 1	\$22,000
<b>GREAT POTENTIALS FOUNDATION</b> , three years' salary for the HIPPY NZ training manager, Year 2 of 3	\$240,000
<b>HE KOROWAI TRUST</b> , to move whānau from substandard or state housing dependence to affordable home ownership on a site that is designated drug, alcohol and violence free, Year 2 of 2	\$131,528
<b>LAW FOR CHANGE OTAGO</b> , funding for projects on criminal justice, law reform, human rights and legal education, Year 1 of 1	\$7,577
<b>LIVING WAGE MOVEMENT AOTEAROA NZ</b> , support community organisers to facilitate the collective voice of civil society for a Living Wage, Year 1 of 3	\$210,000
<b>MANA TĀNE ORA O AOTEAROA</b> , Raise awareness of men's health issues to improve Māori men's health, Year 2 of 2	\$355,000
<b>MANUREWA MARAE TAIOHI WHAI ORANGA</b> , salary and resources for a NEET youth pathways programme, Year 1 of 2	\$160,000
<b>NELSON TASMAN PASIFIKA COMMUNITY TRUST &amp; KIDPOWER TEENPOWER FULLPOWER TRUST</b> , empower the Pasifika community to develop and implement a domestic violence prevention programme, Year 1 of 3	\$190,000
<b>NEW ZEALAND DRUG FOUNDATION, TAUTĀWHIHI, KAUA E WHIU</b> , a community action project building support for health-focused drug law, Year 1 of 2	\$298,800
<b>NGĀ HONONGA MARAE (CHARITABLE) TRUST</b> , to establish a Community Business Development Hub in Whanganui, supporting Māori development and transformational change through employment and business ownership, Year 2 of 2	\$246,000
<b>NGĀ RANGATAHI TOA</b> , Whānau Relationship Manager; co-create programmes of advocacy and empowerment for parents in alternative education community, Year 1 of 3	\$218,495
<b>NGĀ TĀNGATA MICROFINANCE TRUST</b> , to extend Ngā Tāngata's microfinance services and implement its advocacy role, Year 2 of 2	\$319,060

<b>NGĀ WAKA O TE TAI TOKERAU TRUST</b> , to develop the Leadership Programme 'Tōkihi' for Māori Rangatahi within Tai Tokerau, Year 1 of 1	\$84,100
<b>NGĀTI POROU HAUORA</b> , to model the economic impact of NPH as a health provider, Year 1 of 1	\$7,500
<b>PRESBYTERIAN SUPPORT CENTRAL – FAMILY WORKS</b> , a prison parenting programme to improve women's parenting skills, reduce reoffending and improve child safety. Year 1 of 2	\$141,000
<b>PUBLIC HEALTH ASSOCIATION</b> , to establish a full-time Māori leadership position to strengthen collaborative action on Māori health, Year 1 of 1	\$100,000
<b>SHAKTI LEGAL ADVOCACY &amp; FAMILY SOCIAL SERVICES</b> , mobilise ethnic young people against family violence and abuse, resource development for youth leadership training, Year 1 of 1	\$52,420
<b>ST JOHN OF GOD HAUORA TRUST – COMMUNITY, YOUTH AND CHILD SERVICES</b> , Hope – Housing Opportunities for Parental Enhancement, Year 1 of 2	\$145,100
<b>START TARANAKI</b> , an external qualitative evaluation, where the information comes from young people and their whānau, Year 1 of 1	\$20,000
<b>STORYTIME FOUNDATION</b> , enhanced services for disadvantaged families during baby's first 1000 days for long term positive change, Year 1 of 3	\$210,000
<b>TE ARA TIKA O TE WHĀNAU TRUST</b> , to employ a key worker to influence change of social disadvantaged in vulnerable families for positive outcomes, Year 2 of 2	\$160,000
<b>TE KĀHUI O TE RANGI</b> , to hold a series of 4 x 3-day noho which will transform participants to a place of understanding, and to know who they are as Tāne, Year 2 of 2	\$160,000
<b>TE KOROWAI AROHA O AOTEAROA</b> , build capacity of whānau, hapū, iwi to strengthen themselves through training, advanced practice models for whānau practitioners, Year 2 of 2	\$215,148
<b>TE MAURI O PŪTAUAKI CHARITABLE TRUST</b> , to empower men to build confidence, raise self-esteem and restore pride, knowledge and mana, to nurture and care for self, whānau, hapū, iwi and community, Year 2 of 2	\$38,460



<b>TE MAURI TAU</b> , to continue the development and expand the wider delivery of a non-violent parenting programme model, Year 3 of 3	\$300,023
<b>TE PŪMAUTANGA O TE ARAWA CHARITABLE TRUST</b> , to contribute towards growing and connecting the future leadership of Te Arawa. Year 1 of 1	\$65,000
<b>TE REANGA IPURANGI ŌTAKI EDUCATION TRUST</b> , to establish an office, employ an executive officer, whānau engagement coordinator, and administrator, to engage children and their families in digital learning, Year 2 of 3	\$315,000
<b>TE RŪNANGANUI O NGĀTI POROU</b> , to support the Ngāti Porou Marae Development Project – Mā Wai Rā? To build the skills, structures and support for Ngāti Porou Marae and hapū to maintain the centres of their communities, Year 2 of 3	\$150,000
<b>TE TAI TOKERAU IWI CHIEF EXECUTIVES' CONSORTIUM</b> , to build the leadership platform for Te Tai Tokerau Maori to drive their economic growth and prosperity, Year 1 of 2	\$160,000
<b>TE WHARE HUKAHUKA</b> , to improve leadership of Māori Trusts to ensure financial sustainability and improve the well-being of Māori whānau, Year 2 of 2	\$180,000
<b>THE MOKO FOUNDATION</b> , Project Manager/Co-ordinator, Year 1 of 3	\$342,400
<b>THE NEW ZEALAND FEDERATION OF FAMILY BUDGETING SERVICES</b> , social enterprise project to encourage core budgeting skills, Year 1 of 1	\$20,000
<b>THE NEW ZEALAND NATIONAL COMMITTEE FOR UNICEF TRUST BOARD</b> , 'Kids Missing Out' – online resources tracking progress to implement UNCROC and tools enabling better decision-making. Year 1 of 1	\$30,000
<b>THE UMMA TRUST</b> , Muslim women development and leadership programme Year 1 of 3	\$180,000
<b>THE UN ASSOCIATION OF NZ</b> , Waikato branch, model UN Assembly 2015 for Waikato High School students who do not get this opportunity in schools, Year 1 of 1	\$1,625
<b>TOKOMAIRO WAIORA INCORPORATED</b> , hold a Community Wellness Health Promotion Expo, Year 1 of 1	\$1,400

<b>TŪ KOTAHI MĀORI ASTHMA TRUST</b> , Tamariki Manawa Ngāwari – Children breathing easily, Year 1 of 2	\$209,798
<b>VICTORY COMMUNITY HEALTH</b> , wages and overheads for the Keep Victory Safe community development project, Year 2 of 2	\$100,000
<b>WHAKATIPURANGA RIMA RAU</b> , identify, facilitate and fill 500 employment opportunities for Māori within the health and disability sector, Year 2 of 2	\$320,000
<b>WHANGANUI RESTORATIVE PRACTICES TRUST</b> , to build connections with individuals/whanau and community providers in the Gonville/Tawhero community. Year 1 of 1	\$5,150
<b>WHARE ORA TRUST</b> , to increase the number of Pasifika and Māori people into home ownership by reducing and managing debt. Year 1 of 2	\$185,774
<b>Te Kāwai Toro grants</b>	
<b>NGĀ HONONGA MARAE TRUST</b> , to support collaboration between the Trust, Rotary and Black Power Whanganui	\$15,000
<b>MĀORILAND FILM FESTIVAL</b> , contribution to 2015 festival	\$20,000
<b>R.E.K.A TRUST</b> , teaching Māori groups about growing and eating their own food	\$10,000
<b>PATU AOTEAROA</b> , social enterprise providing exercise programmes for Māori and Pacific communities	\$50,000
<b>TE RAU MATATINI</b> , enabling participation at Healing our Spirit Worldwide — The Seventh Gathering	\$9,200
<b>WORLD INDIGENOUS TOURISM ALLIANCE</b> , enabling participation and support for the development of Māori-led tourism in Aotearoa	\$19,000
<b>TAMAKI HERENGA WAKA TRUST</b> , develop a framework for a waka-based education programme	\$15,000
<b>Connecting Education and Communities grants</b>	
<b>TE HUARAHI</b> , schools and whānau working together to improve educational outcomes for Māori, Year 5 of 5	\$153,680
<b>HOROWHENUA PASIFIKA EDUCATION INITIATIVE</b> , Engaging Tongan and Samoan families in early childhood education in Levin, Year 3 of 3	\$206,250

<b>WAITAKERE IMPROVING SCHOOL ATTENDANCE PROGRAMME</b> , Success for Little People, an initiative to ensure that all 5 year olds are ready for school, Year 2 of 2	\$134,000
<b>RUAKAKA SCHOOL</b> , educational community support, Year 2 of 2	\$34,400
<b>WAIMATE MAIN SCHOOL</b> , a cluster of schools working together to engage families, Year 2 of 2	\$25,000
<b>TE WAKA UNUA SCHOOL</b> , to encourage parental and whānau engagement in the new school, support transition to a new learning environment, build and develop connections with the school community Year 1 or 2	\$62,000

### The Learning Fund

Small grants to support schools and community groups learning about effective family engagement

- Waimate Main School \$500
- Te Kura Kaupapa Māori o Māngātuna \$500
- Te Kaahui Kohanga Reo \$500

### Deaf Development Fund – total granted \$52,000

The Deaf Development Fund enables capacity building in the Deaf community by supporting individuals in study and personal development, and by funding Deaf-led initiatives to enhance skills, leadership, new knowledge and cultural resources of the New Zealand Sign Language (NZSL) community. Grants enabled a variety of projects, including:

- 15 individual study awards for the Certificate in Deaf Studies: Teaching NZSL at Victoria University.
- Two Sir Roy McKenzie VUW Deaf scholarships for degree study at Victoria
- Delegates to attend the World Federation of the Deaf Congress, and WFD Deaf Youth Camp, in Turkey.
- NZSL interpretation of a theatre performance in Taranaki
- The NZ Deaf Short Film Festival
- Grief workshop for Deaf people
- A Deaf swimmer to compete in the Asia-Pacific Deaf Games

### The Penny Went NZSL Family Learning Fund

This fund was wound up in early 2015 after all (bequeathed) funds were disbursed by DDF.



# Where does the money come from?

## Rangatira Investments

**R**angatira is an investment company that grows iconic New Zealand businesses such as Hellers, Polynesian Spa, Rainbow's End and Tuatara Brewing. Rangatira's portfolio companies employ over 900 people across a wide array of sectors. It utilises a co-investment model and recently invested alongside existing owners in scientific equipment distributor Bio-Strategy in June 2015.

Established in 1937 by Sir J R McKenzie, Rangatira pioneered private investment in New Zealand, and currently has assets of \$200m. Through gifting by McKenzie family members, the J R McKenzie Trust holds 51% of the company. A further 15% of the company is held by other charitable organisations such as Te Ōmanga Hospice, Outward Bound and the Ngā Manu Reserve.

Rangatira's charitable roots define their objective; to pay steadily growing dividends each year, while also increasing the capital value of its shares. This is achieved through investing in and growing great New Zealand businesses with revenue of between \$10 and \$150 million.

In 2014-15, the J R McKenzie Trust received \$4.3 million in dividends from Rangatira.

Rangatira's CEO Phil Veal says "Our relationship with the J R McKenzie Trust is unique in New Zealand and helps us differentiate from other investors. Being able to see our efforts translate into great social outcomes is a huge driving factor for us."

Rangatira is run by an investment team of four people supported by a Board of Directors.

**For further information about Rangatira, see: [www.rangatira.co.nz](http://www.rangatira.co.nz)**

## Jayar Charitable Trust

**T**he Jayar Charitable Trust is an investment fund whose returns are given to the J R McKenzie Trust to distribute for charitable purposes in New Zealand. The Jayar Charitable Trust is in effect an investment arm of the J R McKenzie Trust, which appoints its trustees.

Since its inception in 1998 Jayar has contributed \$2.2 million.

Peter McKenzie played a major role in the establishment of the Jayar Charitable Trust and served as its chair for many years. Before his death, Peter set out his vision for the future and proposed a new direction for Jayar. On this basis the Jayar Charitable Trust and the J R McKenzie Trust have jointly agreed to spend Jayar's capital and income over approximately 20 years. The funds are to be invested in a specific programme or area of focus with appropriate evaluation, to achieve visible, measurable positive social change. This work has been named the Peter McKenzie Project in memory of Peter's vision:



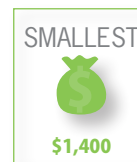
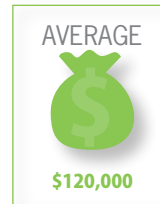
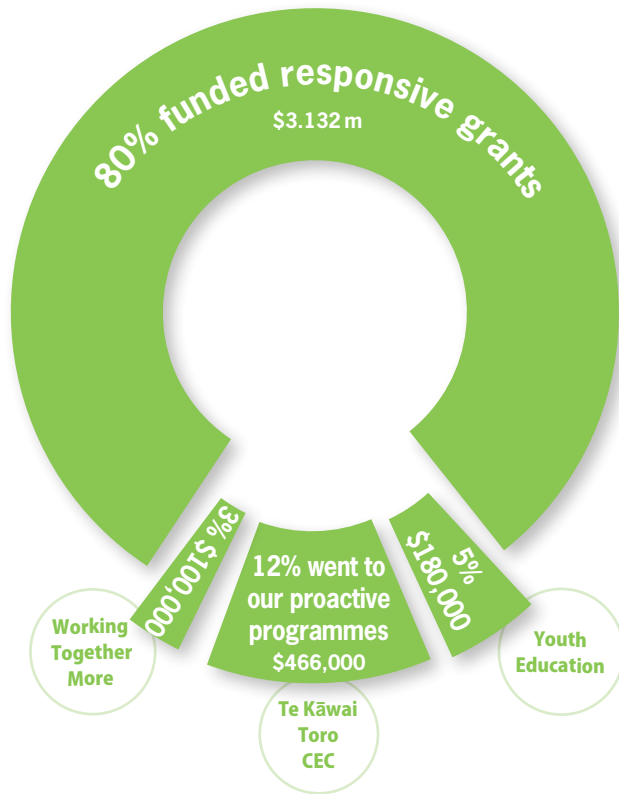
*"This scale of investment in a single project or area could have a really significant impact, generating a much greater 'social return on investment' than could be achieved by continuing the present strategy." – Peter McKenzie*

A working group has been formed to guide the project and a developmental evaluation has begun. After an extensive process of scoping and research, it has been determined that the Peter McKenzie Project will focus on addressing the issue of child poverty in New Zealand.



# Finances — Ngā Pūtea

BUDGET THIS YEAR **OVER \$3.87 m**



## OUR RESPONSIVE GRANTS

**10% of the 250 applications we received in 2015 were successful**

RESPONSIVE GRANTS **FOCUS**

- 38% Maori development
- Disadvantaged 42% children & their families
- Social justice 20% & inclusion

**26 NEW GRANTS\***

12 for one year  
**6 for two years**  
8 for 3 years

\*Includes 10 grants less than \$30,000

### FINANCIAL YEAR ENDING 31 MARCH 2015

	2014-15	previous year
Grants and other support	\$3,389,890	\$2,821,981
Other spending on community support	\$258,952	\$338,874
Operating costs including salaries	\$786,994	\$671,353
Total Trust funds	\$105,417,241	\$94,282,808

*“... the only use of money is the use you make of it.”*

A full set of audited accounts is available from the office.



*Iti noa ana, he pito mata –  
With care, a small kūmara will produce a harvest.*

