




J R MCKENZIE TRUST
ESTABLISHED IN 1940

ANNUAL REPORT

Pūrongo Pūtea a Tau

2016



Chair's report 2016 — Pūrongo a te Tumuaki 2016

Condensed from Chair's Report to AGM 2016.



Tēnā Koutou Katoa
In its 76th year, the Trust is guided by a vision of a socially just and inclusive Aotearoa New Zealand.

This means a society in which everyone has a good quality of life, fair treatment and a voice, even people in

those communities which have the fewest choices. Our specific but not sole focuses are on Māori Development, and Disadvantaged Children and their Families. Using our limited resources and relative freedom from the constraints faced by many funders, we want to contribute to long-term change.

It is inspiring to meet the social change makers who lead the organisations we work with, and hear their stories. This is the most rewarding part of our work. We do what we can to support *their* work through being the most effective funder we can. We seek to establish positive, supportive relationships; and look for opportunities to add value in other ways.

Alongside the grants we make, the team puts some funding, and many hours of effort, into our targeted programmes, Te Kāwai Toro and Connecting Education and Communities, our main focus areas.

The Peter McKenzie Project (PMP) will next year seek to attract and generate ideas to reduce child and family poverty rates. While PMP has some funds to use, its point of difference is its 20-year time frame:

this is enabling us to consider a long-term project, to experiment and learn. In philanthropy we often talk about complex problems needing long-term dedication; this is an opportunity. Executive Director Iain Hines will over time make this project the primary focus of his work.

The Trust has long been concerned by the number of New Zealand children who are disadvantaged by poverty, and has continued its involvement in the Child Poverty Monitor. It is absurd that in a relatively wealthy country with a tradition of fairness, one in four children live in households below the internationally recognised poverty line.

This year we farewell two valuable Trustees, Lyn Holmes and David Vance. We also welcomed to the Board, Christine Scott, Chelsea Grootveld, Jane Montgomery and Anna Gibson. Anna is a great-grandchild of Sir John McKenzie, and joins her cousin Chris McKenzie on the Board.

After nearly 20 years, our Administrator Alison Glen is retiring in February. Alison has been unfailingly helpful and supportive of Trustees and staff. We wish her the very best for her next adventures.

There are many who make the Trust's work possible. The groups that we support give us back so much, in advice and perspective but above all in inspiration. Volunteers are vital too – Board and Committee members, others (including Rotarians) throughout the country, and many more who give freely of their advice and support. Our investors at Rangatira and Jayar are also crucial. Big thanks too to the small staff team.

Ngā mihi nui ki a koutou katoa.

Patrick Cummings, Chair

Where does the money come from?

Rangatira Investments

In 2015–16, the JR McKenzie Trust received \$4.3 million in dividends from Rangatira Limited, an investment company established by Sir John McKenzie in 1937.

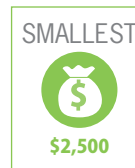
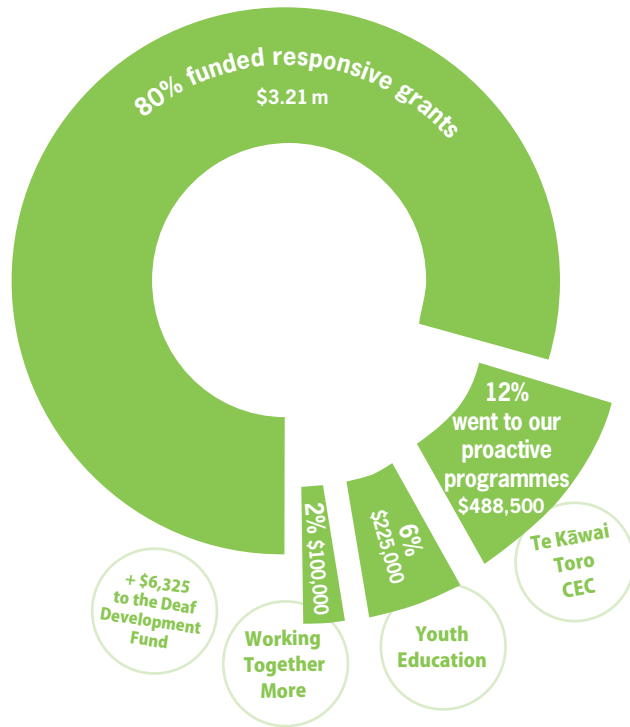
Jayar Charitable Trust

In 2015–16, the JR McKenzie Trust received \$100,000 from the Jayar Charitable Trust.

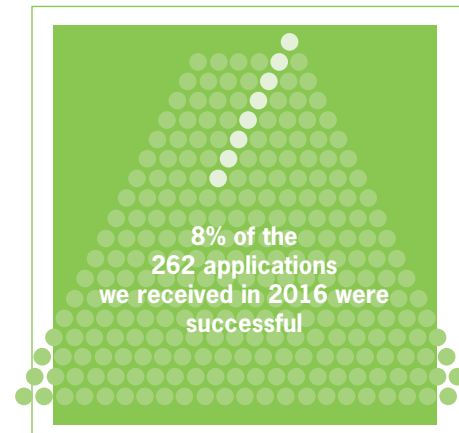
Finances — Ngā Pūtea

Spending on grants and programmes this financial year to date.

BUDGET THIS YEAR **OVER \$4m**



OUR RESPONSIVE GRANTS



RESPONSIVE GRANTS **FOCUS**

- 29% Maori development
- Disadvantaged 31% children & their families
- Social justice 40% & inclusion

27 NEW GRANTS*



*Includes 9 grants less than \$30,000 for 1 year.

FINANCIAL YEAR ENDING 31 MARCH 2016

	Previous year	2015-16
Grants and other community support	\$3,389,890	\$3,091,073
Other project spending	\$258,952	\$295,874
Operating costs including salaries	\$786,994	\$763,886
Total Trust funds	\$105,417,241	\$105,305,666

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

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



Te Kāwai Toro — ‘the shoot that reaches out’

Te **Kāwai Toro** (TKT) Committee continues to lead the Trust’s involvement in proactive Māori development. In line with its 5-year strategy, TKT invited a Reference Group of philanthropic, iwi and government leaders to assess the need for a collaborative funding platform which they acknowledged and approved.

On the 6th of October, Māori development grantees gathered in Wellington to share their stories, learn from each other, make connections, and take part in a workshop on creating ‘Earned Income/a Social Enterprise’ facilitated by Te Whare Hukahuka. This will now become an annual event as requested by participants.

Later in the same month, two members of the TKT committee, Manaia King (who is on the International Funders of Indigenous Peoples (IFIP)), and Paula Therese King, attended the IFIP Latin America Indigenous Conference in Lima, Peru.

The focus of the conference was *Supporting the role of Indigenous Peoples in Bio-Cultural Diversity, Human Rights, and Sustainable Economic Models*. At the dinner, Manaia took the opportunity to promote the IFIP Pacific Regional Hui being held, 8-9 May, 2017 at Te Wānanga o Raukawa, Ōtaki, for international and national funders, indigenous organisations they have funded, and indigenous leaders.



*‘Iti noa ana, he pito mata’ With care, a small kūmara will produce a harvest.
‘Ka whatiwhati kō’, Māori development kaimahi and members of Te Kāwai Toro*

Te Kāwai Toro Grants 2016

Mauria te Pono Trust	\$ 18,000
Matauanga Roopu — Ha o Te Ora Wharekauri Trust	\$9,712
Te Kahui Mana Ririki Trust	\$30,000
Iwi Chairs Constitutional Transformation Working Group	\$ 9,000
Te Kotahitanga Ruawai-Hamilton Whānau Trust	\$ 15,000
Total	\$81,712

Te Kāwai Toro (TKT) Committee continues to lead the Trust’s involvement in proactive Māori development.

Connecting education and communities — Better educational outcomes

The **Connecting Education and Communities programme (CEC)** is directing its efforts to supporting community groups with capacity to engage with ‘disadvantaged’ children and their whānau, and work with them to increase educational potential and achievement.

Based on five years’ of experience, the CEC team has been working alongside groups in four communities — Wainuiomata, Levin, Kaikoura, and Rānui, West Auckland. 2016 was focused on assessing education needs and designing 3- to 4-year projects based on community input and capacity.

Wainuiomata Pasifika Education Success Initiative (WaiPESI) was started in 2011 with an over-arching vision “to work with and empower Wainuiomata’s Pasifika families and community to achieve the best educational outcomes for our children and their families”. Developing a long-term strategic plan and identifying the drivers that will support the team to achieve it has been the focus during 2016.



Kaikoura’s Education Trust spent its 2016 funding allocation scoping and developing a project plan for a Community Learning Hub in Kaikoura. With an aim of lifting the educational achievement of all Kaikoura youth and whanau, a well-developed plan was all set to be rolled out when the earthquake struck on 13 November. After reassessment and much tweaking to the original plan everyone is optimistic about this project for 2017.



The Rānui Action Project: “We would like to work particularly with women as influencers and enablers within families disrupted by physical and/or emotional circumstances which have disengaged them from conventional educational opportunities and pathways.” This was the focus for RAP in 2016 as they sought to understand, from practical and lived experience, some of the challenges of entering into adult learning and childcare, and also to understand the learning needs of families for whom English is a second, and in some cases a seventh, language. Interviews and focus groups were run with solo-caregiver families living in the caravan park at Rānui.



Connecting Education and Communities Grants 2016

WaiPESI	Phase 1	\$50,000
	Phase 2	\$34,500
	Kaikoura Education Trust	\$21,000
	Rānui Action Project	\$33,000
	Muaūpoko Tribal Authority	\$24,500
Total		\$163,900

The **Muaūpoko Iwi Authority** see having a quality Education Plan as being absolutely at the heart of, and essential to, a platform for future prosperity and success for their people. Schools in Horowhenua have not proactively engaged with tangata whenua in the past. However, due to all the work undertaken over the last year between iwi and new leadership in many local schools there is a unique opportunity to make genuine stepwise change for both Muaūpoko and Māori outcomes through all stages of education in Horowhenua.



Responsive Grants Fund — Responding to community changemakers

In 2016 the Trust supported a total of 27 organisations from our Responsive Grants Fund. The many different initiatives funded can be found on our website page [Who we support](#). An example from each focus area is highlighted here.

Māori development

The **MOKO Foundation** has begun a courageous and innovative project to eradicate MRSA as one of its many efforts to improve child health outcomes in high-needs communities.

MRSA is the term used for bacteria of the staphylococcus aureus group (*S. aureus*) that are resistant to the usual antibiotics used in the treatment of infections with such organisms.

Starting with the Far North New Zealand, the Foundation's focus is to gain further support to eradicate MRSA from Northland and across the country.

In 2016, as a result of some 29 referrals with positive lab results of MRSA, 186 whānau members were treated resulting in all referrals and whānau members eradicating MRSA from their homes.



Trustees of the MOKO Foundation.



Youth opportunities with the MOKO Foundation.

As part of communicating and promoting their service, at the end of 2016 the MOKO Foundation launched a promotional video, the **Burden of MRSA**, which can be viewed on youtube.



Deidre Ōtene with Hanna, Kale and Connor at the NZ Consulate in Hawaii.

Another success story of 2016 was in the area of Rangatahi Leadership. General Manager Deidre Ōtene was invited to speak at The Future Leaders of the Pacific Conference in Hawaii and several Rangatahi were also able to attend.

Social Justice and Inclusion

ActionStation — the fastest growing people-powered progressive campaigning movement in Aotearoa New Zealand — was funded for a three-year campaign aiming to build a digitally-savvy community of citizens who will work collectively to change the debate about poverty and inequality.

Hopefully at the election in 2017 it will be impossible to be elected without a meaningful, convincing suite of

policies to restore economic balance and justice in New Zealand.



ActionStation campaigns for economic fairness.

With support from the JR McKenzie Trust, ActionStation has expanded the capacity of the team by hiring a dedicated inequality campaigner to help develop and implement digitally-facilitated people-powered campaigns focused on:

help develop and implement digitally-facilitated people-powered campaigns focused on:

- reframing the way we talk and think about social and economic justice in New Zealand;
- shifting the 'centre' of the debate about inequality and poverty in New Zealand;
- achieving progressive policy wins, i.e., policy changes that will measurably improve the lives of New Zealanders.



... the fastest growing people-powered progressive campaigning movement in Aotearoa New Zealand.

Responsive Grants Fund — Responding to community changemakers

Disadvantaged children and their families

St John of God Hauora Trust – HOPE Project: The focus of the HOPE project is working with vulnerable young parents (aged 16–24 years) and their children who are living within the greater Christchurch area, and are homeless or at risk of homelessness.

These young people and their children may also be experiencing poverty, domestic abuse, mental health problems, alcohol and drug issues, social exclusion, lack of social and family support, lack of access to social, economic, educational resources, and a low level of parenting skills and experience.

The HOPE project was implemented in August 2015 and to date the young parents participating in the programmes are all statistically showing positive improvements in their lives and the lives of their children. All participants and their families have been able to immediately (not had to sit on a wait list) access social work support/crisis intervention, mental health services and childcare at Little Owls Preschool based at St John of God Waipuna. They have also been supported to ensure that they are receiving their correct entitlement from WINZ.



Congratulations to our Peer Support team for completing their 11-day Housing First, Peer Support Training.

The most significant gain that has been made is that young parents and their children have accessed safe accommodation in an environment that is appropriate for their needs, is warm and free from harm.

Social Justice and Inclusion Small Grants

Lifewise Trust Housing First Project: In November, 14 people with lived experience began their journey to explore the values, philosophies and mahi of peer support.

The rōpū spent time understanding the importance of relationship building, ethical decision-making, boundaries, advocacy, effective communication, conflict resolution, goal planning, the cycle of change, and indigenous models of health. Four weeks later, on 8 December, they received graduation certificates.

“You are our roots,” said Moira Lawler, Lifewise Chief Executive, to the graduates. “We have gone out on a

limb to pursue our goal of ending homelessness, using the principles of Housing First.

“And like the roots of a tree that give its limbs the strength and courage to flourish, you give us the strength and courage to reach out and find new solutions that will end homelessness in Aotearoa.”

Peer support is an integral part of the Housing First model, and the delivery of the initial training is part of a long-term plan to embed peer support into the city centre Housing First programme.





J R McKenzie (1876–1955) and Lady McKenzie

For more information...

Kia whai māramatanga anō ...

- About applying for a grant
- Audited accounts 2015–16
- Rangatira Limited Annual Report
- Download additional copies of this report

Visit our website: www.jrmckenzie.org.nz

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Iti noa ana, he pito mata –

With care, a small kūmara will produce a harvest.

This report was produced by Central Media, Wellington; with graphics by Te Tahī Tākao, Ōtaki; and printed by Excel Digital, Wellington.

Cover: The Rānui Action Project (see page 5). Photo by Edith Amituanai.