

# J R McKenzie Trust Annual Report 2019-2020



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#### J R McKenzie Trust

The J R McKenzie Trust is a philanthropic family trust that has been grantmaking in Aotearoa New Zealand since 1940.





## Tēnei te mihi atu ngā whānau whānui o J R McKenzie Trust.

The Trust's Board and team members have been busy with the development of our new strategy, Te Anga Rautaki. It was formed following a review designed to ensure that the Trust's mahi over the next decade is responsive to the current and emerging needs of the communities we serve.

In support of our moemoeā/vision, "Kia hua mai he whenua ka toko i te tika me to pono hei korowai mō Aotearoa"/"A socially just and inclusive Aotearoa New Zealand", Te Anga Rautaki has a singular priority: working and investing in ways that advance equity through transformational change and system-focused solutions. Advancing equity means addressing underlying causes of inequity and exclusion. It means shifting the conditions that hold inequities in place, that prevent people from fulfilling their potential.

While we continue to have a strong focus on Māori, children, young people and whānau, this priority will see us focus on enabling and partnering with other pou/communities of interest experiencing the greatest inequity, exclusion and disadvantage: Pacific Peoples; and communities that experience exclusion. As we work in partnership with ngā kaikōkiri in these interconnected communities, we will build on the Trust's legacy of showing aroha to the vulnerable, being bold with a strengths-based community-centred approach, and learning from the promising work of ngā kaikōkiri to achieve transformational change.

This year, we have seen extraordinarily tumultuous times. COVID-19 has placed unique additional pressures on communities throughout Aotearoa. Here at the Trust, we mobilised to support ngā kaikōkiri who are always best-placed to lead the most effective community responses. By offering funding flexibility and continuity, we sought to enable and empower our partners at speed. It was a credit to all how quickly support was able to reach those most in need and it was a reminder to me of the importance of nurturing these strong and successful relationships.

We would not be able to do what we do without the contributions of those who support us. My deepest thanks to all of the people who make our work possible.

Naku noa, na

Manaia King  
Chair, J R McKenzie Trust Board

## Tēnā koutou katoa.

The J R McKenzie Trust places whakawhanaunga or relationships at the heart of what we do. When working with ngā kaikōkiri, who are the leaders of social change in their communities, we strive to build strong, respectful relationships so that they can undertake their important mahi.

We are always inspired by the many creative thinkers using their passion and skills to care for others and catalyse change for good throughout Aotearoa New Zealand. These unique attributes were held by Sir John when he established the Trust 80 years ago and continued when Sir Roy took the helm. Both led the Trust with integrity and courage, while seeking to support equitable outcomes for New Zealanders, and it's this we aspire to.

There are a couple of J R McKenzie Trust programmes that I want to give special mention to, both of which have undertaken recent reviews. Connecting Education and Communities (CEC) has been an integral part of the Trust's proactive funding stream for the last decade. Through CEC, in the last 5 years, the Trust partnered with six diverse communities in support of their determination to achieve improved educational outcomes for their tamariki and whānau. A quote that captures the essence of the mahi is from Rangimarie Mules of Te Rūnanga-Ā-Iwi-O-Ngāpuhi in Kaikohe:

*"I think a big part of the impact and scale of this project was the reclamation of culture and social norms that reinforce behaviours and systems that build our people up. It's a decolonisation process... our systems impact is about reclamation."*

Te Kāwai Toro (TKT) was established in 2003 as a strategic response to lead, proactively address and enable Māori Development. Nan Weipeihana (Ngāti Tūkorehe, Ngāti Porou and Te Whānau-ā-Apanui) recently conducted an evaluation of TKT through a Kaupapa Māori methodology. A goal of TKT has been to see a significant positive shift in Māori funding from the Trust, and Māori representation in its governance. TKT brought the principle of partnership to life, putting Māori and Māori interests at the heart of grant-making decisions to support Māori initiatives, and making the Trust more culturally welcoming to Māori by progressively deepening trustee and staff understanding of tikanga Māori and te ao Māori. TKT is contributing to stronger and more connected communities.

I want to thank everyone we work with and alongside – without such committed and talented people striving to make a difference, our mahi would not be possible.

Noho ora mai,

Robyn Scott  
Executive Director



# Te Anga Rautaki Strategy 2021–2030

Our new strategy, Te Anga Rautaki, is the latest expression of the giving philosophy developed over the last 80 years by the McKenzie family; a philosophy grounded in respect for the mana and mahi of the organisations and communities it supports.

## Our funding approach

Ngā kaikōkiri are the people who champion, promote, advocate and lead together with their communities. Our funding partnerships with ngā kaikōkiri are relational, flexible, strategic and mana-enhancing.

Some of the things we will consider in the funding decision-making process are:

- Our values are aligned and there is a shared desire for a high trust relationship
- It is clear how communities had input into the initiative, and how it responds to their aspirations and will continue to involve them
- We value relationships before resources
- Ngā kaikōkiri may be working collaboratively
- There are clear signs of readiness for the initiative and its impact
- There is alignment between the intended outcomes and impact of ngā kaikōkiri and the J R McKenzie Trust

## Our funding tools

- **Quick Response Grants**  
Funding quickly to keep momentum and respond to time-sensitive opportunities
- **Seed Funding**  
Seeding new ideas and testing innovation, including social enterprise initiatives
- **Impact Funding**  
Long-term funding surety for ngā kaikōkiri with whom we have trusted relationships
- **Cohort Funding**  
Intentional funding of groups or clusters of ngā kaikōkiri

## The way we work

We work with ngā kaikōkiri and invest in ways that advance equity through transformational change and system-focused solutions.

We focus on four pou / communities that often intersect:

- Children, young people and whānau
- Māori
- Pacific Peoples
- Communities that experience exclusion

## Our Vision

A socially just and inclusive  
Aotearoa New Zealand

Kia hua mai he whenua ka toko i te tika  
Me to pono hei korowai mō Aotearoa

## The impact we want to see

- **More connected communities**  
Stronger connections and relationships within and among communities and ecosystems
- **More inclusive decision-making**  
Power is shared so that communities are able to be self-determining and participate equitably in decision-making about issues that affect them
- **Equitable access to resources**  
Communities have fairer access to the resources that they need to achieve equitable social and environmental outcomes
- **Increased capacity for transformational change**  
More effective social change practices and communities have greater capacity and capability to lead change
- **Equitable public policies**  
Effective policy and legislation that is designed to address the underlying structural causes of inequality and exclusion



# Connecting Education & Communities

Whaowhia te kete mātauranga

# Te Kāwai Toro

Iti noa ana, he pito mata

Two weeks before the country went into full lockdown due to the COVID-19 pandemic, the final hui of all participants in the Connecting Education and Communities programme (CEC) was held at Muaūpoko's Kawiu Marae, Taitoko/Levin (see photo).

The six communities who had been working with the J R McKenzie Trust team over the last five years were able to demonstrate the educational outcomes achieved in each of their communities and showcase these achievements in a series of films they made with @filmforchangez, a collaborative and innovative film-making group who work to benefit both the charities and the volunteers with whom they work.

Each community brought to life their stories of difference and change and three particular strategies used were shown to be key in empowering communities to have a greater role in attaining their educational aspirations.

By being strengths-based, allowing time for community voices to be heard, and supporting locally driven solutions, CEC has developed a way of working that is leading to long-term sustainable change in the six communities it has supported.



Te Hā o Mātauranga, Learning in Kaikōura is now a "go-to" place for Kaikōura residents who want to learn.



**Muaūpoko Tribal Authority** focuses on affirming the culture and identity of the iwi.



**The Rānui Action Project** worked intensively with local women who are major influencers in their whānau and community.



**The Whanganui Learning Centre Project** uses a community development approach in order to support participants to express their own educational needs.



**ATAWHAI Trust** is working hard with rangatahi and their whānau to reverse poor education and hauora statistics in Tairāwhiti.



**Te Rūnanga-Ā-Iwi o Ngāpuhi** in Kaikohe is working with Te Kura Takawaenga o Kaikohe to build a te ao Māori framework to engage taitama.

## Here are some of the outstanding ways ngā kaikōkiri Māori are making a difference:

**Tūhoe Tuawhenua Trust**  
Delivering its outdoors rangatahi programme in Ruatāhuna

**Hikurangi Enterprises**  
Planning, training and business development support with whānau

**Te Tihi o Ruahine Whānau Ora Alliance**  
Progress made to the Te Mauri Moemoeā project

**Poutama Rites of Passage**  
Hosted a series of webinars on their YouTube channel and Facebook page



**Te Whare Hukahuka**  
Progressed setting up an online e-commerce system for Māori enterprises

**The National Iwi Chairs Forum**  
Launched its campaign in May, asking Kiwis "What is your Vision for Aotearoa?"

**Ngātiwai Trust**  
Launched its smartphone application Kōkiritia Te Aroha

**Te Pae Tata**  
Upskilling in technological development with whānau



**Ngā Kākano**  
Held five Foetal Alcohol Spectrum Disorder early intervention education sessions with parents

**The Climate Change Iwi Leaders Group**  
Supported the Tairāwhiti Climate Summit in Gisborne

**Te Kotahitanga e Mahi Kaha Trust**  
Moving taitamariki and whānau into employment, training, and business development

**Tū Māia**  
Developed their own regional delivery training, tailored to regional needs



**Te Ataarangi Trust**  
Hui a Tau held in Melbourne earlier this year

# Peter McKenzie Project

He oranga tamariki, he oranga whānau, he oranga tāngata

# Opportunities, Partnerships & Collaboration

He waka eke noa



The Peter McKenzie Project (PMP) has supported seven initiatives striving to understand the systems and structures that lock families into poverty, while working to unlock those constraints. We are learning more about how we can work together to make “the whole more than the sum of the parts”. This work involves learning as we go, trying things out and adapting.

## Ngā Kaikōkiri – Champions of Change

### The Workshop

The Workshop are researchers and advisors who draw on many disciplines to understand how public narratives and mental models influence people’s thinking. The Workshop provides research, support and advice to organisations working in the complex space of systems change.

### Tokona te Raki

This Ngāi Tahu-led collaborative was established to increase Māori participation, success and progression in education and employment outcomes. Its goal is to achieve equity in education, employment and income for all Māori in the Ngāi Tahu takiwā by 2040.

### Community Housing Aotearoa

Community Housing Aotearoa (CHA), along with partners, developed The Shift Aotearoa, a platform to understand what a well-functioning housing system means in Aotearoa and how it can be achieved. The vision is for all New Zealanders to have good, affordable, warm, safe homes in locations that enable communities to thrive.

### Te Ohu Whakawhanaunga

The purpose of this emerging alliance is to address the causes of poverty in families and communities, so that Auckland flourishes. Te Ohu Whakawhanaunga fosters active citizenship and civil society leaders who have the ability to negotiate with decision-makers toward systemic and structural change.

### WhyOra

WhyOra’s aim is to empower rangatahi and whānau to fulfil their potential through participation in education and the workforce. This mahi helps to lift whānau incomes, empowering whānau to shift out of poverty towards the fulfilment of aspirations, contributing to the wellbeing of the whole community.

### Muaūpoko Tribal Authority and FinCap

The Muaūpoko Tribal Authority (MTA) and FinCap have formed a partnership to boost wellbeing at community and national levels. As Tangata Whenua for Taitoko/Levin, MTA has mana whenua and kaitiaki responsibilities for all who reside there. It is seeking to lead and facilitate a community effort around eradicating poverty by 2040. In partnership with FinCap, the intention is to build and operate a strong child poverty lobby, with advocacy and campaign strands.

### ActionStation, Child Poverty Action Group, NZ Council of Christian Social Services, The Workshop and FinCap

In 2019, five organisations campaigned together for welfare reform. The Government-commissioned Welfare Experts Advisory Group’s report, widely respected as a template for a welfare system which would enhance the mana of users and help them achieve their aspirations, was the catalyst for this collaborative work.



Now in its second year, the Opportunities, Partnerships and Collaboration fund (OPC) has really taken off and \$410,000 has been allocated for six more exciting and innovative projects in the reporting period.

### ARA TAIOHI

**Rainbow Ready 2.0** – Establishing a National Rainbow Knowledge and Training Hub (**\$70,000**)

### BE.LAB

**Be Lab Portal** – scoping and co-design project creating a local (and then global) community of access citizens, leaders, innovators and entrepreneurs committed to designing a more accessible future world (**\$70,000**)

### DRIVING CHANGE

**Driving Change** – Investing in systems change and participatory grantmaking to create an equitable driver licensing system for Aotearoa NZ (**\$70,000**)

### FINCAP

**FinCap Campaign** – Enabling and promoting the voice of consumers to build the best credit law possible (**\$75,000**)

### LEADERSHIP NEW ZEALAND

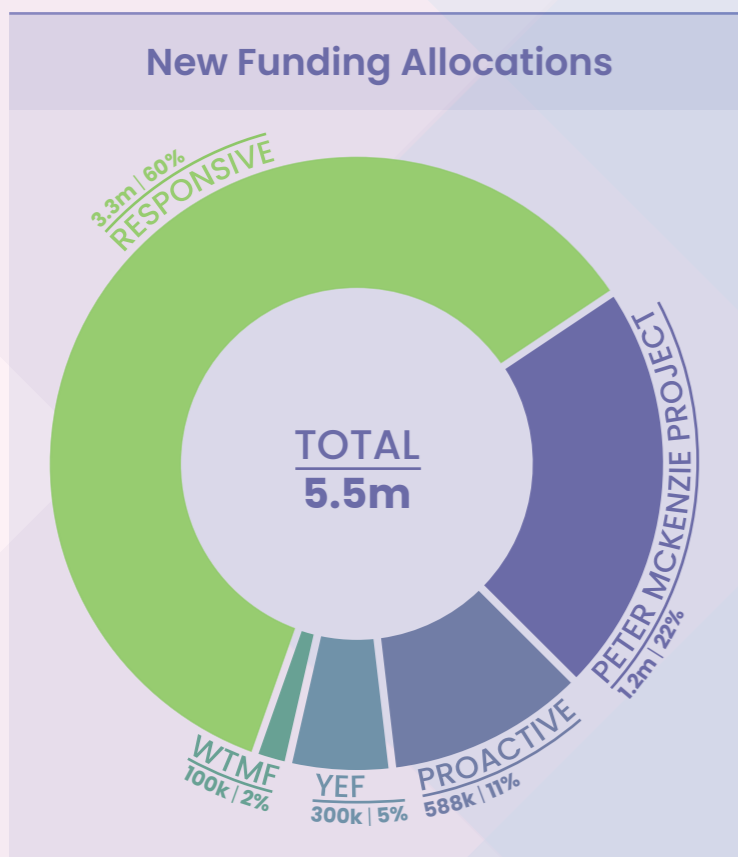
**Mana Moana leadership course** – For emerging Pacific leaders (**\$85,000**)

### TE AROHA KANARAHU TRUST

**Project Hoake** – Let’s Do This Together – support and mentoring for local whānau-led businesses with the underlying goal of lowering unemployment and suicide rates (**\$40,000**)

Ngā Mātāpono – our Principles of Practice – describe **four ways** of working that reflect our values and are congruent with the Trust’s identity and overarching beliefs.

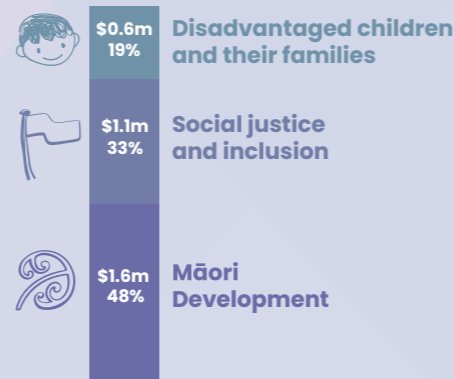
### 1. Fund Pūtea



We invested in ngā kaikōkiri, forming trusting and mana-enhancing partnerships based on shared goals aligned to our respective visions for impact.

We used our financial resources with flexibility and invested in ways that were fit-for-purpose for each opportunity.

### Funding by Focus Area



### Financial Year Data (Ending 31 March 2020)

|  |                 |
|--|-----------------|
| All grants to community organisations*                 | \$5.6m          |
| Other assistance and proactive project support         | \$0.7m          |
| Operating costs, including salaries                    | \$1.0m          |
| <b>Total J R McKenzie Trust and Jayar Trust Assets</b> | <b>\$121.6m</b> |

Taken from the consolidated accounts, and includes Jayar Trust and Peter McKenzie Project. A full set of audited accounts is available from the office.

\* Includes funds distributed in the winding up of the Deaf Development Fund

### Where does the money come from?

#### Rangatira Investments

The J R McKenzie Trust received \$5.5 million in dividends in 2019/20.

#### Jayar Charitable Trust

The J R McKenzie Trust received \$1.8 million from the Jayar Charitable Trust in 2019/20 for the Peter McKenzie Project.



### 2. Convene Whakamene

This involves making time and space for bringing ngā kaikōkiri and other funders together when there is opportunity to explore shared interests, to problem-solve or to collaborate.

The best example of this in 2019 was the biennial Philanthropy New Zealand Summit where staff joined with ngā kaikōkiri in presentations and workshops on education and advocacy. The Māori Advisory Committee collaborated to convene two workshops, *Supporting Māori Aspirations*, and *Next Steps: Developing an Aotearoa Philanthropy Model*.



### 3. Advocate Hapahapai

The Trust provides approximately one third of its responsive funding allocation for groups involved in advocacy focused projects and development.

In 2019 the Ministry of Education’s *Review of Tomorrow’s Schools* provided the opportunity for each of the CEC communities to put in submissions directly related to their own community, as well as contribute jointly to a submission to government from the Trust.



### 4. Learn Ako

Annual sharing and learning hui with ngā kaikōkiri involved in each of the proactive programmes were also held during the year and included:

1. Te Kāwai Toro hosted 30 plus people at its *Hui Kaikōkiri* in September 2019 to share learnings with each other from their projects.
2. The Peter McKenzie Project and The Todd Foundation co-convened *Retreat for Systems Change* for 40 people in October 2019.
3. Connecting Education and Communities held a final hui with the six communities they have been working with over the last five years. *Haerenga ki Muaūpoko* was held at Kawiu Marae, Taitoko, where each community shared their own film of changes they had made and the outcomes they had achieved during the life of CEC.
4. In early March the Trust co-hosted a forum in Auckland for funders called *Advocacy and Systems Change* with CSI and PNZ. New York-based Emily Tow-Jackson of the Tow Foundation presented alongside ngā kaikōkiri from JustSpeak, Lifewise and Asylum Seekers Support Trust.

## Acknowledgements

### Mihi

*He aha te mea nui o tēnei ao, he tāngata, he tāngata, he tāngata.*

We extend our heartfelt appreciation to regional Rotarians and panelists, Rangatira Investments and Jayar Charitable Trust investors, board members, staff and contractors. To all ngā kaikōkiri that we have had the pleasure of partnering with this year; thank you for your enthusiasm and commitment.

**Board of Trustees:** Manaia King (Chair), Joan Smith (Deputy Chair), Melissa Campbell, Jay Farris, Anna Gibson, Dr Chelsea Grootveld, Chris McKenzie, Jerry Norman, Christine Scott, Aiolupotea Lili Tuioti, Jonathan Usher, Louise Edwards

