



J R McKenzie  
Trust

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*Cover photo:*  
*Common Unity Project*

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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.



J R McKenzie Trust  
**Annual Report**  
2020-2021



# Chair's Letter

## Pūrongo a te Tiamana



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

There can be no doubt that this past year has presented challenges that nobody could have foreseen. COVID-19 was quick to flush out existing issues and call attention to the day-to-day difficulties facing communities around the motu. Equally, this pandemic has undoubtedly placed additional pressure on the organisations operating on the front line. Despite this, and in the face of ever increasing need, ngā kaikōkiri have gone above and beyond to support their communities. It is this commitment and fortitude in the face of adversity that has impressed me most, and it has been an honour to walk alongside these leaders and support their mahi in a meaningful way.

A big part of the Trust's focus this year has been on the continued development and fine-tuning of Te Anga Rautaki, our new ten-year strategy. The intent has been to ensure that our mahi is responsive to the current and evolving requirements 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*", the priority of Te Anga Rautaki is to work and invest in ways that advance equity through transformational change and system focused solutions. This means addressing the underlying causes of inequity and exclusion and changing the circumstances that prevent people from realising their potential.

To achieve this goal, we will continue to seek partnerships with ngā kaikōkiri who are leaders of social change in their communities and are best-placed to know what works for the people they serve. We are focused on four pou/communities of interest that often intersect: Children, young people and whānau; Māori; Pacific Peoples; and Communities that experience exclusion. We will build on the Trust's legacy of demonstrating compassion and aroha to those in need, being courageous, supporting a strengths-based community-centred approach, and learning from ngā kaikōkiri as they aspire to achieve transformational change.

There are many people who make the work of the Trust possible and without them, we could not begin to accomplish even a portion of what we set out achieve. I am thankful and appreciative for the generosity, expertise and dedication they extend towards us each and every day.

Nāku noa, nā

A handwritten signature in blue ink, appearing to read 'Manaia King'.

Manaia King

**Chair, J R McKenzie Trust Board**

# Executive Director's Report

## Pūrongo a te Manahautū

### Tēnā koutou katoa.

In 2020, COVID-19 showed up in Aotearoa New Zealand uninvited. Very quickly, existing inequities were amplified, and the insecurities faced by many whānau were highlighted in stark relief. A priority for the J R McKenzie Trust was to figure out ways in which it could support ngā kaikōkiri who were on the ground, adapting to this new and uncertain situation which had rapidly compounded the existing challenges communities were facing. From offering funding security and flexibility, through to making small grants to support organisations to pivot and address developing need, the Trust has sought to help relieve the immense pressure ngā kaikōkiri were under.

While this time has been difficult, it has not been without its highpoints. I have been inspired and encouraged to see communities come together and rise up through challenging times. In the face of unique and additional burdens, organisations mobilised to lead collaborative responses that effectively addressed immediate need. I think it is important to recognise and acknowledge just how innovative and responsive ngā kaikōkiri have been in the face of enormous demand, all the while continuing to lead crucial programmes and services.

During 2020-21, the Trust worked to further develop our new strategy, Te Anga Rautaki, so that it was ready to implement in the new financial year. This has meant developing the systems and processes that operationalise the strategy: translating the 'what' and 'why', into the 'how'. The priority of Te Anga Rautaki is working and investing in ways that advance equity through transformational change and systems focused solutions. One of the steps we have undertaken as we have worked towards the 'how', has been to understand what we mean by equity.

From the start, the Trust has been about supporting those facing disadvantage: levelling the playing field, so that all can thrive. This has equity at its core. If equality means each individual or group of people is given the same resources or opportunities, then equity recognises that each person has different circumstances and allocates the exact resources and opportunities needed to reach an equal outcome. Equity must be built and maintained, so that it can be passed onto future generations, and we are confident Te Anga Rautaki will guide the Trust well as we seek to support transformational change.

The Trust depends heavily on volunteers to achieve its goals. We are extremely grateful to the Board and Committee members, Rotarians, and many others who provide expert advice and support. The Trust is also very fortunate to have such a dedicated and talented team of staff and contractors working to make a difference and I want to thank them for their valuable contributions.

Noho ora mai,



Robyn Scott

**Executive Director**



# Our COVID-19 Response

## Partnering with ngā kaikōkiri

This year, Aotearoa New Zealand has witnessed turbulent times as COVID-19 placed additional pressures on communities throughout the motu. Here at the J R McKenzie Trust, we rallied to support ngā kaikōkiri who are always in the best position to lead the most effective community responses. By offering additional funding, flexibility and continuity, we sought to rapidly enable and empower our partners. It was a credit to all how quickly support was able to reach those most in need and it was a reminder that without fostering these powerful relationships, our mahi would lose some of its mana.

One community the J R McKenzie Trust sought to enable and empower to respond at speed was Common Unity Project Aotearoa (CUPA), which worked with Kōkiri Marae to provide a meal delivery service to vulnerable families during Alert Level 4.



## Common Unity Project Aotearoa and Kōkiri Marae Together, We Grow

CUPA is a community-based urban farm project – growing food, developing skills and fostering leadership with local families with a purpose of growing a vibrant and resilient local community together. The results achieved have demonstrated that great things can happen when neighbours, whānau, schools, groups and businesses work together.

Kōkiri Marae, based in Seaview, Lower Hutt, is known for establishing and piloting new initiatives. Besides taking on the customary role of a marae, it is also an organisation that provides a holistic range of services encompassing education, health initiatives, and cultural and spiritual values and aspirations.



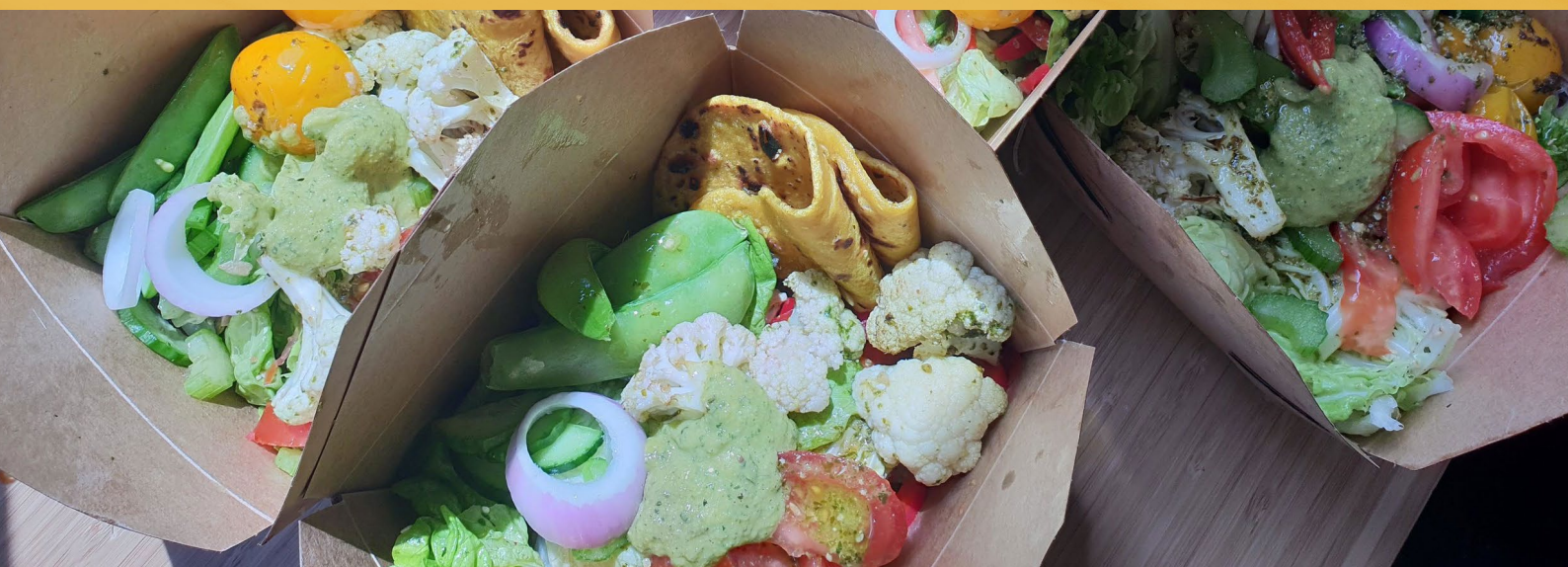
The goal of the partnership between CUPA and Kōkiri Marae was to get wholesome, healthy food to local residents in a mana-enhancing way.

“In lockdown, we realised the extent of the food system challenges, with foodbanks closed and massive need in the community. But alongside this, the high trust environment from funders and stakeholders meant we could be fully operational within two weeks, delivering up to 2,000 meals per week alongside Kōkiri Marae.”

“This new partnership has grown into a committed collaboration now where both

organisations are able to not only work together with great agility, but also to learn from one another,” said Julia Milne, Development Director CUPA.

Throughout the motu, communities have come together to rise up through challenging times. This partnership was created to quickly reach and support those most in need by working together to achieve locally-owned visions and goals. Its success is testament to what can happen when communities are enabled and empowered to address local challenges with local solutions.



# Te Kāwai Toro

Iti noa ana, he pito mata

## Ngā kaikōkiri leading the way

Many rōpū of incredible Māori-led initiatives across Aotearoa that Te Kāwai Toro are privileged to work with have continued to make their mark. Each are working on initiatives to support their communities and one another.

### Ngāti Rangī

Te Pae Tata, the digital hub of Ohakune and surrounding Ngāti Rangī areas, continued to deliver social outcomes for eSports, whānau tech upskilling, and marae revitalisation using virtual reality.

### Tūhoe Tuawhenua Trust

Reconnecting rangatahi with traditions of their tūpuna is a focus for this Ruatāhuna-based rōpū, and their programme continued to provide this kaupapa over the last financial year.

### Hikurangi Enterprises

Continued expanding on their social enterprise model to create employment and business opportunities for Te Tairāwhiti.

### Climate Change Iwi Leaders Group

Held and attended multiple hui across Aotearoa to engage iwi, whānau and hapū on climate change and its effects on Māori and launched a Māori climate network – Ihirangi.

### National Iwi Chairs Forum

Held a virtual hui over Waitangi weekend to progress the kaupapa of defining what modern-day rangatiratanga looks like for Māori, to support the work of the esteemed Dr Moana Jackson.

### Tū Māia

‘Haututū’ is the newest venture that highlights whānau creating new realities through enterprise.

### Ngā Hau e Whā Maara Kai

Working to become a successful

learning centre teaching horticulture and permaculture with a focus on emerging rangatahi leadership.

### Māoriland Charitable Trust

Ran their incredible film festival despite COVID-19 posing challenges for the event sector. They also ran multiple courses to upskill rangatahi in filmmaking and digital skills.

### Te Aitanga a Hauiti

Developed the Hauiti Wānanga, which creates an iwi-based achievement approach to accelerating positive outcomes for rangatahi in training, education, and employment.

### Te Tihi o Ruahine Whānau Ora Alliance

Developed their dream app ‘Te Mauri Moemoeā’, and this year expanded the project, turning one app into a full suite of products to help whānau collectively dream together.

### Ngātiwai

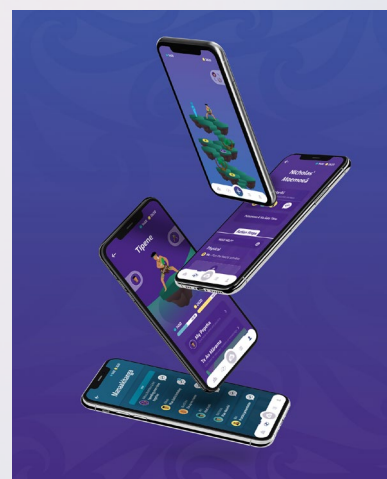
Offered a range of social development support with a focus on housing, employment, youth suicide and alcohol/drug prevention.

### LIFT Youth Employment

Creating Jobs, Creating Futures with a focus on enterprise development and job creation for unemployed young people, mainly Māori youth in Whanganui.

### Te Kotahitanga E Mahi Kaha Trust

Opened their new digital hub in Kaikohe, housing, a co-working space, digital upskilling courses, a mobile tech hub, and more to make digital dreams a reality in the rohe.



## Summary of Te Kāwai Toro activities, pūtea, investments etc.

### HUI KAIKŌKIRI

Despite being postponed due to COVID-19 restrictions, Te Kāwai Toro's annual event, the Hui Kaikōkiri, went ahead in November.

This incredible two-day hui is an opportunity for us to learn from ngā kaikōkiri we are privileged to work with, and to be inspired by their mahi.

The hui saw dozens of Māori gather to share their kaupapa, their learnings, and to connect with one another.

### TE KŌRERO PŪRĀKAU

One area of focus for Te Kāwai Toro in the last financial year was supporting rōpū to tell their stories to a broader audience.

Poutama Rites of Passage had their amazing rangatahi tikanga and Rites of Passage workshops profiled on TV3's The Project. An opinion piece on the importance and function of rangatiratanga in a modern world was run for the National Iwi Chairs Forum in Stuff.

Te Kotahitanga E Mahi Kaha Trust opened their digital hub in Kaikohe with a pōwhiri that journalists from Māori Television, Stuff and the NZ Herald attended and covered.

### PROJECTS INVESTED IN



### REGIONS INVESTED IN



8

### PŪTEA INVESTED



\$1.37m

### RŌPŪ INVESTED IN



13



# Opportunities, Partnerships & Collaboration

## He waka eke noa

Working and funding proactively together with both funders and organisations working for social change, has seen ten grants totalling \$0.91 million approved by the Opportunities, Partnerships and Collaboration Committee of the Trust in the year ended 31 March 2021. In the previous year \$0.4 million was allocated to seven collaborations.

Partnerships amongst ngā kaikōkiri organisations have been strong and robust and these have accelerated the scope and outcomes of the projects as appropriate partners contribute to different components of any one initiative.



### **The Southern Initiative of Auckland Council** (\$100,000)

**He Waka Eke Noa** – funding a Regional Relationship Manager role to grow their membership base of Pacific and Māori owned businesses and enterprises and supply chains beyond Auckland.

### **Take2 Limited** (\$75,000)

**Take2** – deliver an end-to-end rehabilitation programme for people in prison, to better prepare and support individuals caught within our justice system to help break the cycles of crime and intergenerational poverty.

### **LinC Puāwai cohort #2** (\$50,000)

**Puāwai** – a bi-cultural programme with an authentic focus on diversity and inclusion to a diverse network of rangatahi to contribute to their community.

### **Tākiri Mai te Ata Whānau Ora Collective** (\$90,000)

**Pātaka Kai and Maara Kai** – a Social Enterprise

Business Model to establish a permanent Pātaka Kai and Maara Kai to meet the kai needs of whānau, who are accessing Tākiri Mai te Ata services in the Wainuiomata and wider Hutt Valley Community.

### **Te Pae Roa Tika** (\$84,000)

**Te Pai Roa Tika Whanau Engagement and Insights Start-up** – to grow their network and produce a pipeline of projects, alongside the Tuakana/Teina approach within the organisation.

### **Leadership NZ** (\$85,000)

**The Mana Moana Experience** – by working with Pasifika leaders to explore and meaningfully engage with their ancestral knowledge and wisdom, contribute to strengthening, building leadership capacity and confidence of Pasifika leaders to be catalytic agents of transformational change for communities, organisations and Aotearoa.





Funding partnerships with other philanthropic colleagues have also increased this year with Wayne Francis Charitable Trust, Len Reynolds Trust, Community Trust South, joining our regular partners Todd Foundation and Foundation North in a number of co-funded initiatives.

**Sport Waitākere** (\$100,000)

**West Auckland Together Collective** - Community organisations committed to working together for Māori and Pasifika. We are building the current belief and confidence from our Māori and Pacific community.

**Te Tuhi Contemporary Art Trust** (\$75,000)

**Te Tuhi Training Cafe for people with intellectual disabilities** - a training café project that benefits not only the trainees who receive skills and employment, but also the wider community through a greater exposure to the strengths of people with intellectual disabilities.

**Belong Aotearoa** (\$100,000)

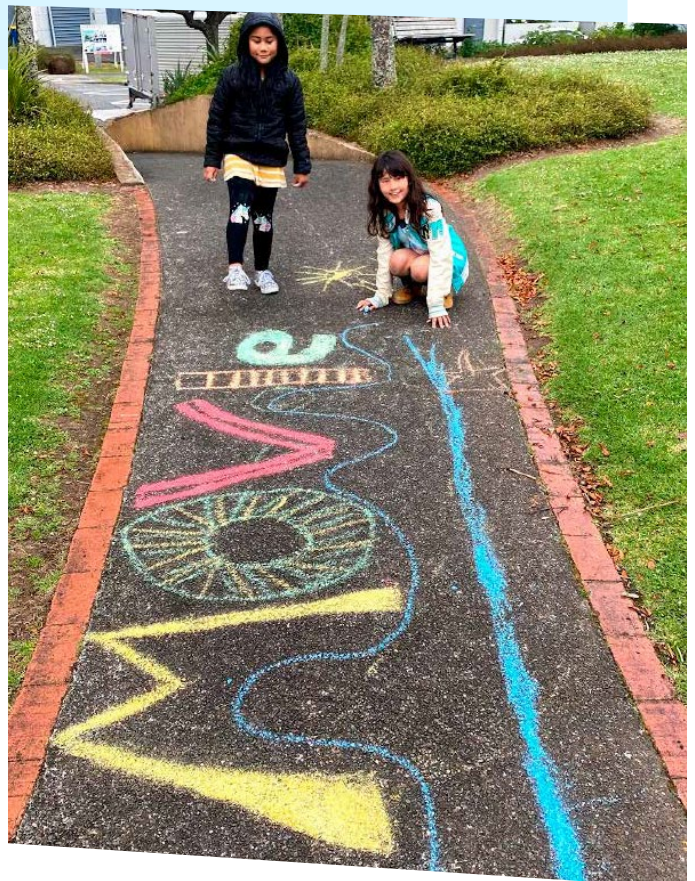
**Systems Change Collaboration for Resettled Communities** - to work with the existing members of the Aotearoa Resettlement Sector Steering Group (ARSSG) and others identified by the group to develop and grow the understanding of systems change thinking in action.

**Driving Change Network** (\$150,000)

**The Driving Change Network** - a national systems change focused network, dedicated to creating an equitable driver licensing system for Aotearoa.

An example of multiple organisations collaborating in partnership is the West Auckland Together Collective where organisations are committed to working together with the shared goal of a thriving West Auckland.

To achieve their joint vision, West Auckland Together agreed to work for Māori and Pacific communities. As a result, the Collective has disrupted existing collaboration models and is implementing a new innovative model that enables Māori and Pasifika to lead within their communities.



# He Pito Mata

Our quarterly e-newsletter

## The mahi of ngā kaikōkiri



The J R McKenzie Trust has had the privilege of supporting many organisations and we take pleasure in highlighting the valuable mahi they do in their communities by featuring them in our quarterly e-newsletter, He Pito Mata.

You can visit our website at [jrmckenzie.org.nz](http://jrmckenzie.org.nz) to read the full stories outlined below, and subscribe.

### Te Ataarangi Trust – Kia kore koe e ngaro taku reo rangatira

Te Ataarangi Trust is at the forefront of Māori language revitalisation in Aotearoa New Zealand and has supported more than 50,000 people to learn to speak te reo Māori.

### Te Whare Tāne – Working together for Better Fathers, Better Partners, Better Men

Te Whare Tāne – The House for Men provides access to support services for men involved in incidents of family harm, including those issued with a PSO (Police Safety Order) or warnings from the Court.

### Child Poverty Action Group – An Aotearoa Where All Children Flourish

Since 1994, Child Poverty Action Group (CPAG) experts have dedicated themselves to providing research into the causes and consequences of child poverty, as well as formulating evidence-based policy recommendations that are promoted widely.

### Te Ngākau Kahukura: Championing Rainbow Young People

Te Ngākau Kahukura is a national initiative that strives to develop and enhance the environments in which rainbow young people live, learn, and access health services and social support.

### ActionStation: A Campaign of Hope

Independent, crowd-funded, community campaigning organisation, ActionStation, answered the Peter McKenzie Project's call to crowdsource big ideas in response to the challenges presented to Aotearoa New Zealand in the wake of COVID-19.



# Peter McKenzie Project

He oranga tamariki, he oranga whānau, he oranga tāngata



The Peter McKenzie Project (PMP) has embarked on the next step in its ongoing experimental journey by looking at how it can incorporate participatory philanthropy into its funding approach. This philanthropic methodology actively engages ngā kaikōkiri in the grantmaking process. It's about sharing control and working together on the big decisions; and recognising that much of the expertise and know-how rests with the communities that philanthropic organisations are aiming to support.

In February 2021, ngā kaikōkiri and the PMP Committee gathered for a Mahi Tahi (working together as one) hui in Mana Retreat in the Coromandel. Together, they discussed whether there was an appetite for involvement in this type of philanthropy, and if the answer was yes, then what could it look like. It was important to recognise the different perspectives and ensure that any future developments reflected these, while also supporting ngā kaikōkiri to get on with their individual programmes of work.



***Mahi Tahi Hui Participants at Mana Retreat in the Coromandel***

It was agreed that a more participatory approach could help accelerate the work needed to enable whānau to live free from poverty, while also helping to identify emerging issues and innovative ways to counteract them. While more exploration is needed, it was acknowledged that since this system of grantmaking promotes diversity, equity and inclusion, it instinctively seems to fit with the ethos of both ngā kaikōkiri and PMP.

## UPTEMPO

A new addition to the PMP flotilla of community programmes and initiatives working to tackle the root causes of child and whānau poverty in Aotearoa New Zealand is Uptempo. It sits within The Southern Initiative (TSI), a social innovation unit nested within Auckland Council, centred on South and West Auckland communities.

Uptempo is a transformational outcomes-focused programme that seeks to understand what it takes at a grassroots and system level, to shift the dial to create intergenerational wealth and social mobility for Pasifika people and their families. Uptempo works on multiple levels: listening to and working with families themselves; building pathways to secure jobs that are better paid and provide more chances of progression; and ultimately translating this into improved opportunities for the next generation. Uptempo works in partnership with business and government agencies to achieve that.

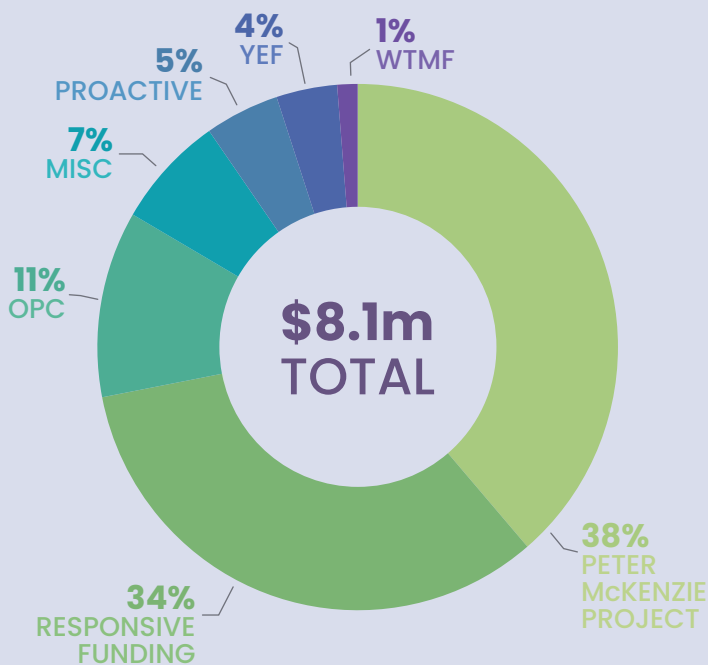
# Finances to 31 March 2021

## Ngā Pūtea

Funding has continued to be our primary means of advancing our vision of a socially just and inclusive Aotearoa New Zealand. In the year to 31 March 2021, we made new grants of \$8.1 million (2020 - \$5.8 million) to community organisations.



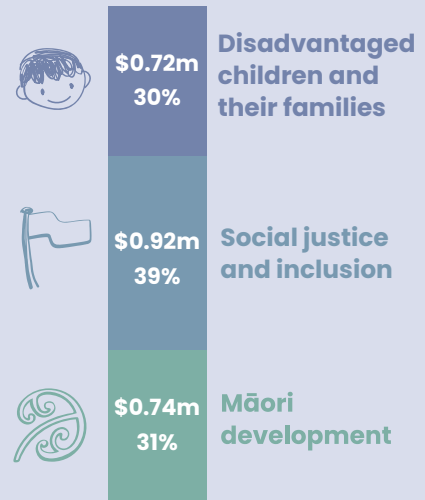
### New Funding Allocations



Note that funding for the Peter McKenzie Project comes from a subsidiary trust, the Jayar Charitable Trust. Funding for all other programmes is covered by dividends from Rangatira Investments.

### Our Responsive Funding Programme

This is our largest funding programme and consists of grants allocated in two main funding rounds each year.



### Financial Year Data

All grants to community organisations	\$8.1m
Other assistance and proactive project support	\$0.6m
Operating costs, including salaries	\$1.0m
<b>Total J R McKenzie Trust and Jayar Trust Assets</b>	<b>\$129.6m</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.

### Where does the money come from?

#### Rangatira Investments

The J R McKenzie Trust received \$4.9 million in dividends in the 2020/21 financial year.

#### Jayar Charitable Trust

The J R McKenzie Trust received \$2.0 million from the Jayar Charitable Trust in 2020/21 for the Peter McKenzie Project.

# Activities

## Ngā Mahi

The outcomes and impacts identified in the layers of our Strategic Plan are supported by three pou in addition to our funding. These three pou enable us to add value to the work being done by ngā kaikōkiri with whom we have relationships.



**Bringing ngā kaikōkiri and other funders together to explore shared interests, to problem-solve or to collaborate.**

- Māori Development hui in Wellington with 15 kaikōkiri groups
- “Face to Face” sharing and networking sessions for 23 kaikōkiri groups in Auckland and Wellington
- The Peter McKenzie Project annual two-day hui for developing communities of learning



**Supporting growth as a learning organisation.**

- The Peter McKenzie Project with the Todd Foundation offered a series of online sessions for their kaikōkiri and others working to create healthier systems
- The Centre for Social Impact worked with staff on “Advancing Equity through Transformational Leadership” and developing an operational plan for the implementation of the Trust’s new strategic framework, Te Anga Rautaki
- The Board took part in a workshop on “Effective Governance Practice for Philanthropic Impact”
- The Board engaged in a workshop with three ngā kaikōkiri (pictured) to further develop their understanding and thinking around the topic of system-focussed solutions



**Examples of advocacy support include:**

- ActionStation Aotearoa, funded by the Peter McKenzie Project, for the implementation of recommendations from the Welfare Expert Advisory Group (WEAG) Report
- The Driving Change Network for the development of an equitable driver education, training and licensing system for Aotearoa New Zealand
- The Living Wage Movement Aotearoa NZ for regular increases in the Living Wage with the overall aim of reducing poverty among the working poor, their families and communities, impacted by COVID-19 related economic hardship
- The Wesley Community Action group for the People’s Voices symposium; a unique opportunity for funders, policymakers and decision makers to listen to the voices of the people



# Funded Organisations

Ko ngā takoha āwhina kua tukuna atu e mātou

## Grants made under our Reponsive programme

<b>Shakti Youth</b>	<b>\$100,000</b>
#LetsDealWithIt - Eliminating Discrimination campaign and national expansion of youth champions in schools and universities.	
<b>Pathway Trust</b>	<b>\$300,000</b>
Reintegrative Community – Navigate Initiative. Creating a safer, happier community for all through better reintegration outcomes for released prisoners.	
<b>Te Aitanga-a-Hauiti Centre of Excellence Trust</b>	<b>\$150,000</b>
Hauiti Wānanga: An iwi-based achievement approach to accelerating positive outcomes for rangatahi in training, education and employment.	
<b>Ngā Hau e Wha Maara Kai Charitable Trust</b>	<b>\$224,270</b>
Maara Kai and Te Haemata Teaching and Learning Centre. Up-skilling rangatahi by delivering hands on education and training in leadership and entrepreneurial skills in the context of practical work in both a Maara Kai (garden) and Te Haemata (native nursery).	
<b>Poutama Rites of Passage Trust</b>	<b>\$50,000</b>
Regional expansion of Poutama Rites of Passage programme supporting young people and whānau to navigate the passage from childhood-adulthood for the wellbeing of communities and wider world.	
<b>Living Wage Aotearoa NZ</b>	<b>\$225,960</b>
Developing leadership capability and sustainable community organisations in an alliance responsive to vulnerable populations in the COVID-19 crisis in Canterbury and Waikato.	
<b>LIFT Youth Employment Charitable Trust</b>	<b>\$98,740</b>
LIFT Business Whanganui - Creating Jobs, Creating Futures - working with disadvantaged rangatahi and employers.	
<b>Te Peka o Wairarapa</b>	<b>\$75,000</b>
Te Mana Whakahaere - Building whānau resilience by conducting a full and comprehensive Māori Health enquiry into the inner workings of all health providers supported by the District Health Board (DHB).	
<b>Wesley Community Action</b>	<b>\$150,000</b>
Building Whānau#Fluence and Real Talk Movements with resilient whanau in Eastern Porirua, to create a better future for themselves and their tamariki.	
<b>ECPAT ChildAlert</b>	<b>\$120,000</b>
Building and activating a frontline specialist network to protect tā tatou tamariki katoa from commercial sexual exploitation.	
<b>Te Waipuna Puawai Mercy Oasis</b>	<b>\$225,000</b>
The HEART Movement: community-led social change on family violence to create healthy whānau relationships.	
<b>The Lifewise Trust</b>	<b>\$225,000</b>
Embedding and building on the successes of the community led development and social enterprise work of Merge Community.	

## Small grants (under \$30k)

Youthline Auckland Charitable Trust

Equality Network

Narrative Imperative / Na\_tive

Patua Te Taniwha Charitable Trust

OraTaiao: New Zealand Climate & Health Council

The Social Enterprise Enablers Network of Aotearoa

Rare Disorders NZ

## 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 2020/21:** 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



Check out our website for more stories and news.

[jrmckenzie.org.nz](http://jrmckenzie.org.nz)

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