

J R McKenzie Trust Annual Report 2021-2022



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Chair's Letter

Pūrongo a te Tiamana

Tēnā rawa atu koutou,

Kia tau ngā manaakitanga ā te mea ngaro ki runga i a koutou katoa.

It was my great privilege to step into the Chairperson role at the J R McKenzie Trust in 2022. I am very aware that I am following in the mighty footsteps of those who have held this position previously, not least my predecessor, Manaia King. I want to thank Manaia for the leadership and vision he demonstrated during his time as Chair, and the great friendship and support he continues to extend to me.

This year, we farewelled long-serving Director of the Peter McKenzie Project and former Executive Director of the Trust, Iain Hines. Our Evening of Celebration allowed the many people who count him as a friend and colleague to acknowledge him and applaud his many achievements. His contribution to the Trust is beyond measure and he will be greatly missed.

This year also saw us saying haere rā to valued Board members Anna Gibson, Chris McKenzie and Christine Scott, and nau mai to Sibyl Bloomfield, Ann Tod and Sarah McLennan. A very big thank you to all for their dedication to the Trust – we acknowledge the vast experience and wisdom they bring to the table.

A big part of the Trust's focus this year has been on the operationalisation of Te Anga Rautaki, our new ten-year strategy. My deepest gratitude goes to the Trust's Executive Director, Robyn Scott, and her amazing team, who have worked so hard to give effect to Te Anga Rautaki. Robyn's leadership has ensured our mahi strives to be responsive to the current and evolving requirements

of the communities we serve. Huge thanks to all for their hard work and enthusiasm.

The current economic climate and the lingering impacts of COVID-19 have created tough living conditions for many whānau and communities. We are fortunate to be part of an ecosystem that inspires, motivates, and actions transformational change. I want to acknowledge our kaikōkiri, philanthropic whānau, and strategic partners that we have had the pleasure of working with this year; thank you for your dedication to making a meaningful difference in your communities.

I also want to mihi the members of Kāhui Rangatahi, Kahuroa Brown, Tiara Hammond, Ryan Campbell and Karioi White, for their valuable influence and perspectives. Kāhui Rangatahi was formed in January 2020 to sit alongside Te Kāwai Toro, the kōmiti Māori of the J R McKenzie Trust, to provide rangatahi voices, whakaaro/thoughts, and perspectives on topics that Te Kāwai Toro is considering or engaged with.

There are many people who make the work of the Trust possible and without them, we could not begin to achieve even a fraction of what we set out to. I am grateful for the knowledge, insight, and commitment they offer us each and every day.

Naku noa, nā



Dr Chelsea Grootveld (Ngāitai, Ngāti Porou, Whānau-ā-Apanui, Whakatōhea and Te Arawa)

Chair, J R McKenzie Trust Board



Executive Director's Report

Pūrongo a te Manahautū



Tēnā koutou katoa,

This year has seen our new ten-year strategy put into action. Te Anga Rautaki has equity at its core. If equality means individuals or groups of people are given the same resources or opportunities, then equity recognises that each person has different circumstances and allocates resources and opportunities needed to reach a more 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 provide a solid foundation to guide the J R McKenzie Trust as we seek to support transformational change.

The Trust's 80-plus year history is rich and unique. We were delighted to be able to tell our story through a visual timeline which features on the walls of our boardroom. From the vision demonstrated by Sir John to the strategic evolution enabled by Sir Roy, and through to the ongoing commitment of the McKenzie Family, the Trust's story is now available for all our visitors to see.

We have had some changes within the Trust team over the past year. We farewelled the wonderful Iain Hines who held leadership roles within the Trust and the Peter McKenzie Project (PMP) for 25 years – his positive impact on the Trust and philanthropy as a whole in Aotearoa New Zealand is vast and valued. Eileen Kelly also stepped down from the Grants Advisor and Programme Manager role after more than seven years – we are grateful for the insights and deep experience she brought to all her work at the Trust, but most especially in the Connecting Education and Communities mahi.

It was our pleasure to welcome Aiolupotea Lili Tuioti, who has joined us as the Director (PMP). We are excited to see everything that she will achieve alongside our PMP

whānau. We also welcomed Matthew McCracken as Grants, Partnerships and Relationships Manager – it has been great to see him settle in so quickly. Sylvia Moe also joined the Trust as Pacific Strategy and Engagement Lead, working on the development and implementation of the Poutū Pasefika strategy. Established in 2021, this is the newest J R McKenzie Pou to the strategy, formed to improve the Trust's support and engagement with Pasefika groups and communities.

Poutū Pasefika is one of five programmes within our proactive Te Pae Tawhiti Funding which is focused on intentionally navigating towards our vision. We nurture relationships with ngā kaikōkiri and other funding partners to advance equity in our communities of interest. Our Te Pae Tata Funding calls for responses to our strategy from the community, who are best placed to know what works for them. We want to help affect change in the ways that work best for those we support and have witnessed significant growth in both philanthropic and community partnerships across all funding – a trend we anticipate continuing.

We are very thankful to the Board, Committee members, Rotarians, and many others who dedicate their time in support of our mahi. The expertise of Rangatira Investments and Jayar Charitable Trust investors is greatly appreciated as well. The Trust is also very lucky to have such a talented team of staff and contractors committed to making a difference – we appreciate all you do.

Noho ora mai,

A handwritten signature in blue ink that reads "Robyn".

Robyn Scott

Executive Director

Our Strategic Framework

Te Anga Rautaki

Late in 2020, the J R McKenzie Trust launched its new ten-year strategy, Te Anga Rautaki, which has an over-arching priority: working and investing in ways that advance equity through transformational change and system-focused solutions.

The J R McKenzie Trust is interested in supporting community-designed and community-led solutions. It is looking to support community innovation, voice and leadership; to strengthen collaboration and support collective action; and to grow capacity to progress system-focused solutions. It seeks to partner with those experiencing the greatest inequity, exclusion and disadvantage in four communities of interest that often intersect: **children, young people and whānau; Māori; Pacific Peoples; and communities that experience exclusion.**

In this way, the vision of 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 can be achieved.

The overarching priority of Te Anga Rautaki is working and investing in ways that advance equity through transformational change and system-focused solutions. Advancing equity means addressing the root causes of inequity and exclusion. It means shifting the conditions that hold inequities in place and prevent people from fulfilling their potential.

Some of the root causes of inequity and exclusion we wish to address include:

- the intergenerational impacts of colonisation
- racism, discrimination, stigma, and bias
- a lack of visibility, representation, and decision-making power
- systems, policies, and services that don't reflect real lives, needs and different world views
- exclusion from adequate income, which further drives exclusion from other opportunities such as housing or education
- exclusion from participation and opportunities e.g. employment or civic participation
- exclusion from services and social supports.

These are the areas where the most pressing issues are evident in Aotearoa New Zealand today, and where the Trust is seeking to make a difference.



Fund Whakakotahi

Funding partnerships have continued to be our primary means of advancing our vision of a socially just and inclusive Aotearoa New Zealand.

We initiate these partnerships through two pathways:

Te Pae Tata

Calling for responses

Impact Grants via online applications

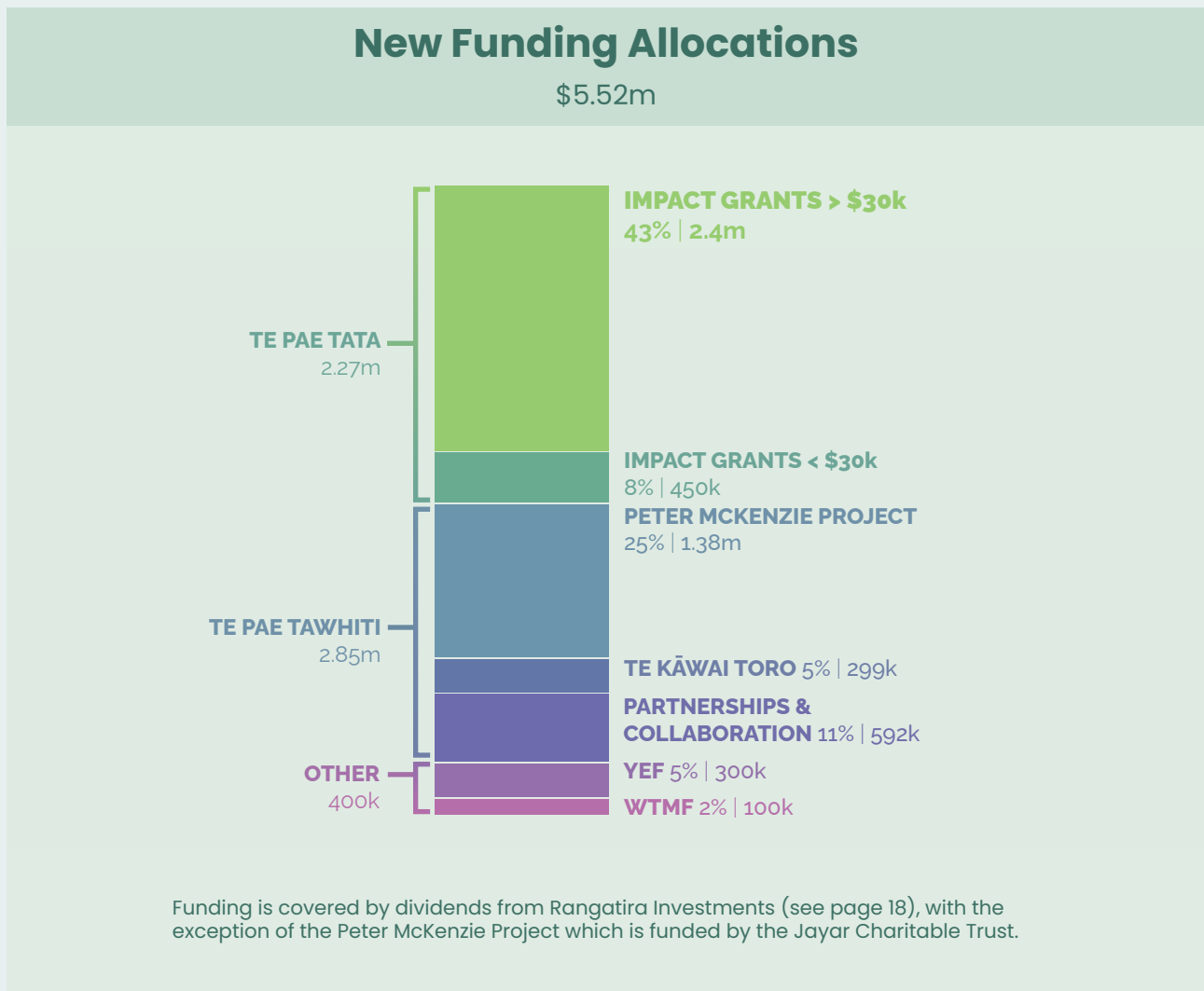
Te Pae Tawhiti

Intentional navigation towards our vision

Our proactive workstreams of: Poutū Pasefika; Te Kāwai Toro; Peter McKenzie Project; Identity, Belonging & Inclusion; and the Partnership & Collaboration Fund

During the year, we restructured our funding programmes to reflect the new strategy including the newly-introduced focus on Pacific Peoples.

In the year to 31 March 2022, we made new grants of \$5.52 million (2021–\$8.1m) to community organisations.





Convene Ahurutanga

We make time and space for bringing together ngā kaikōkiri and other funders when opportunities arise to collaborate or explore shared interest. Examples include:

- Bringing together 14 ngā kaikōkiri groups, with a focus on the Māori Community of Interest, for a two-day hui in Wellington.
- We hosted three “Face-to-Face” sharing sessions for ngā kaikōkiri groups in Auckland and Wellington.
- The Intersectionality Project held its first online hui in March 2021.



Advocate Manaaki

We provide funding to a number of groups involved in advocacy-focused projects and development. Examples include:

- Initial discussions were held with the Human Rights Commission on the possibility of partnering with them and other funders on advocacy in the area of disability.
- PMP provided ngā kaikōkiri with upskilling opportunities in the areas of lobbying and engagement with Government.
- We have been involved with the work of the Hutt Valley Kai Collective which has grown out of COVID 19 and associated food security concerns.



Learn Ako

We facilitate learning opportunities for ngā kaikōkiri as well as our own growth as a learning organisation. Examples include:

- We have worked in a pilot collaborative funding process based in the Ōtaki area where a group of funders are supporting local organisations with their kaupapa.
- PMP funded a collaboration among various ngā kaikōkiri to upskill their teams and undertake research in narratives to shift mindsets around housing in Aotearoa New Zealand.
- Two trustees and the Executive Director were part of the Ki te Hoe wānanga series offered by Philanthropy New Zealand.



Innovate Auaha

We encourage and enable innovation to address complex challenges. Examples include:

- The primary driver for innovation within the Trust during FY22 was the operational implementation of the new strategic framework – Te Anga Rautaki. The operational processes were developed to deliver on our Theory of Change.
- An iterative process was used to develop new application forms, assessment processes, due diligence approaches and relationship agreements.



Face-to-Face Reporting (Wellington)



Hutt Valley Kai Collective

Funded Organisations

Ko ngā takoha āwhina kua tukuna atu e mātou

Impact grants (over \$30k)

\$362,154



Asylum Seekers Support Trust

The Trust's advocacy focuses on winning the hearts and minds of the public and using this support to create pressure on Government and other decision makers to reduce discrimination against refugees and people who seek asylum. This funding will allow this work to continue for another three years.

\$223,445



Lote Tree Trust

Lote Tree Trust is an Auckland-based charitable trust with a vision of building thriving communities. With a focus on young people and ethnic minorities, they facilitate educational, social, economic and capacity-building projects.

\$210,000



E Tipu E Rea Whānau Services

E Tipu E Rea Whānau Services focusses on elevating the voices of mātua taiohi by helping them to develop their advocacy skills and coordinate campaigns, so they can raise public awareness about the discriminatory systems and practices they face.

\$200,000



New Settlers Family and Community Trust

The Trust will be empowering the community by resourcing them with the right tools and skills, so they can create micro-enterprise for socially-excluded and vulnerable communities.

\$160,000



Hāpai Foundation

The Foundation are undertaking a significant piece of work that involves educating businesses on accessibility and taking them through the process of how they can reduce or eliminate accessibility barriers.

\$150,000



Te Hā o Mātauranga

Te Hā o Mātauranga's Education Change Programme builds on The Kaikōura Education Trust's previous success in connecting their community with local schools and training community members to support young people who have been expelled or who are not attending school.

\$150,000



Ranui Action Project

Ranui Action Project is embarking on the Awhi Rito Rānui project which involves working with grandparents/whānau-caregivers and the mokopuna/tamariki in their care who are experiencing stress and isolation.

\$150,000



The Shift Foundation

Te Tauoranga is a programme to connect kōhine Māori with their culture, nature, outdoor recreation and hauoro using Te Aō Māori practices and principles.

\$135,780



Young Workers Resource Centre

The Young Workers Resource Centre (YWRC) is a community organisation dedicated to empowering young workers to challenge systemic inequities in the labour market.

\$121,153



Harbour Sport

Sports Pasifik is advocating for change in the Sport and Health sectors by upskilling and creating pathways for Pasefika people to step into leadership and governance roles.

\$119,486



ChangeMakers Resettlement Forum

The ChangeMakers Resettlement Forum collaborate with decision-makers from resettlement organisations in the Greater Wellington region. Collectively they identify needs and support advocacy to implement policy and systems changes that address gaps in service provision to resettled communities.

\$100,000**Tamaūpoko Community Led Trust**

The Tamaupoko Community Led Trust has been supported to include an additional four settlements in the Whangai area in its community-led development programme.

\$90,000**VOYCE Whakarongo Mai**

VOYCE - Whakarongo Mai advocates for the approximately 6,000 Kiwi children with care experience. This funding supported them to develop a leadership programme for their regional and national youth councils.

\$76,990**Mana Tāhuna Charitable Trust**

Mana Tāhuna is a charitable trust based in Tāhuna (Queenstown) and was formed as a post COVID-19 response. This funding supported it to develop a youth programme to help rangatahi connect with their Māoritanga and to build their capability and resilience.

\$75,000**Shoebox Christmas Aotearoa**

Working alongside low decile schools, preschools, Women's Refuge, and community organisations, Shoebox Christmas Aotearoa provides Christmas gifts to tamariki in low socioeconomic situations.

Impact grants (up to \$30k)

Pride Whanganui Trust	Changing Behaviours, Saving Lives.	\$30,000
Philanthropy New Zealand	Match - Your Funding Place	\$30,000
Community Law Wellington & Hutt Valley	Remutaka Prison Outreach Project	\$30,000
South Seas Healthcare Trust	COVID-19 Delta South Auckland Response - South Seas Healthcare Trust	\$30,000
Tākiri Mai te Ata Whānau Ora Collective	Support to whānau during Level 2-4 COVID Lockdown in 2021	\$30,000
Te Hou Ora Otepoti Incorporated	Digital Communications Overhaul/Marketing Strategy	\$30,000
Creative Natives	Creative Natives Tuakana Teina Hui	\$28,493
Ngatiwai Ki Whangaruru Whenua topu Trust	Strategic Plan	\$25,000
Tāiki e! Charitable Trust	Youth Entrepreneurship in Tairāwhiti	\$25,000
Renters United	Renters United development strategy	\$20,800
Social Change Collective	Social Change Collective 2021/2022	\$20,500
flaxroots - The Social Enterprise Enablers Network of Aotearoa	Social Enterprise Enablers Network Coordinator	\$20,000
Bishops Action Foundation	The Wheelhouse Kaupapa Māori Resource Development	\$20,000
Te Ahi Kaa Training & Social Service Centre	Nga Kaupapa Whakahaere	\$20,000
Community Research	Co-creation of Knowledge Collision Symposium	\$18,500
Te Rūnanga a Rangitāne o Wairau Trust	Te Kaiaotanga o Te Reo	\$18,000
Te Whānau a Kauaetangohia (TWK)	Te Whānau ā Kauaetangohia community-led initiatives	\$15,000
Mā te Huruhuru Charitable Trust	External supervision and wellbeing staff support package	\$15,000
Tagata Tuvalu Otautahi	Culture Celebration	\$12,750
Canterbury Zurkhaneh	Afghan community support and youth development	\$10,000

MIXIT Charitable Trust

Passing the Mantle of Leadership

The Mixit Charitable Trust has a rich history empowering young people from refugee and migrant backgrounds by providing creative platforms that increase confidence and develop capacity. Since 2006, Mixit has been encouraging their young people or Mixers to engage in collaborative teamwork, grow decision-making skills and develop leadership abilities.

Every Saturday throughout the year, Mixers get to take part in free performing arts workshops featuring dance, drama, music and aerial circus. Professional artists host activities with the young people from diverse backgrounds and experiences to increase confidence, self-expression and communication skills.

“Developing this project has been a long journey of discovery, challenge and celebration, and it is a journey that is still unfolding. This initiative supports young people as they walk a fine line between their past and present and determine their own futures,” says Wendy Preston, Mixit Creative Producer/Director.

Mixit offers a dynamic Youth Leadership programme that is open to those who are

interested in taking on more responsibility. This programme offers motivated individuals an opportunity to step up into roles where they face new challenges and opportunities to grow their skills.

Youth Leaders take on organisational and planning responsibilities, gain experience of creative facilitation skills, manage the digital media aspects of the project, have the opportunity and support to initiate events and projects that inspire them.

But it doesn't stop there: Youth Leaders can then graduate into the Alumni team, who actively engage on many levels – as Ambassadors, on the Board, mentoring youth, performing for external events, creating music and participating in continued training to creatively lead and manage outreach opportunities. The rangatahi are being prepared to take responsibility for leading Mixit.

“Currently, we have two Alumni on the Governance Board and have employed another within the staff as Outreach Activator. We also actively look for opportunities to include Alumni as guest artists on the studio floor and have





committed to one day per term of the core programme to be Alumni-led. 2021 is the year when we intend to integrate Alumni even more into the Engine Room and staffing infrastructure,” says Wendy.

The Mixit team is committed to training Alumni to increase their facilitation and leadership skills and have been actively engaging these young people to be more directly engaged in the running of the organisation.

“As an organisation, we hold the vision that one day it will be the Mixers themselves who will be integral to leading the future of the organisation. These rangatahi are the nation’s future leaders and it’s our focus to actively develop their capacity and skills through committing to ongoing professional development across the range of skills needed, alongside our activity base of creative facilitation,” says Wendy.

At its most fundamental, the Mixit programme offers young people the opportunity to develop positive skills and participate in experiences designed to enrich their lives. It’s a multicultural platform where young people with refugee backgrounds mix it up with local and migrant youth. It aims to provide an inclusive place of belonging that develops positivity and social cohesion. Mixit is committed to providing an environment

that encourages self-determination for young people whose voices not always heard.

“Going through the Mixit Youth Leaders programme firstly gives you best of both worlds. You are still a regular Mixer but with more responsibility. You start to understand and appreciate what goes on in an organisation and the outside influences. It has taught me how to treat everyone the same. Young people have just as much talent and hard work to contribute to society as adults. It has taught me to be brave and not undermine myself. To give things a chance. To be ok with trying new things even if they may seem out of my depth. To go for what I want!” says Munashe Tapfuya, Mixit Alumni squad member and Outreach Activator.

These talented young people are also bringing the skills they have developed back into their communities and everyday lives.

“All the skills I’ve learned from Mixit are very helpful because I use them every day at work. Because of my confidence, my community has asked me to become a youth leader and also, I was offered to become an interpreter to help others at the Mangere resettlement centre,” says Mu Nyay, Mixit Alumni squad member.

With Mixit by their side, the future for rangatahi from refugee and migrant backgrounds is looking bright.

Te Kāwai Toro

Iti noa ana, he pito mata

Over the past year, there have been significant and timely discussions with ngā kaikōkiri Māori about how we, as funders, can work do better. It has been a privilege to work alongside ngā kaikōkiri this year and embark on a journey to improve our support.

Ōhanga Hihiri – Thriving Māori Economy

The first hui Pou Māori Cohort was held 2–3 June in Wellington, with kaikōkiri attending from Aotearoa to identify what a thriving Māori economy would look like for them.



Bentham Ōhia, Arlouse Brooking, Erena Kara, Kate Cherrington, Kere Mītai, Helen Clark, Moana Tīmoko, Pera Barrett, Cain Kerehoma, Renay Charteris, Mateawa Keelan, Ani Pahuru-Huriwai, Arapine Walker, Hine Joyce-Tahere

Kāhui Rangatahi

The Kāhui have continued to provide a refreshing and exciting contribution to our discussions from a rangatahi point of view. This year, they worked with a group in Kirikiriroa (Hamilton) that supports young Māori by providing a pathway to employment. Members of Kāhui Rangatahi will attend the Social Enterprise World Forum in Brisbane, Australia, in September 2022.

Ngā Kaikōkiri

Te Ataarangi

Due to the overwhelming number of requests for Te Reo Māori classes, Te Ataarangi plans to significantly increase their kaiako (teacher) numbers to meet the growing need. It is creating a professional development programme.

Shoebbox Christmas

To work with 35 rangatahi to create a framework that will equip and empower them to lead their own projects and understand their ability to effect changes within themselves and their communities.

Te Waka Kai Ora

Building the capacity of Te Waka Kai Ora to upgrade the Hua Parakore Māori organic verification system and support producers to achieve wellbeing and prosperity by caring for Papatūānuku (earth).

Bishops Community Development

Working with local champions who can lead change, gather others around them and identify opportunities to provide support, guidance, and advice.

E Tipu e Rea

Are elevating the voices of mātua taiohi (teen parents) and hapū mātua (pregnant parent) to support them in upholding their mana.

Tamaūpoko Community-Led Development

In four settlements on the Whanganui River Road – Koriniti, Ātene, Parikino, and Pungarehu.

Mana Tāhuna

A focus on rangatahi Māori wellbeing, resilience and career pathways by providing Youth activities centred around hauora (health), and identity.

Ngā Kaikōkiri (cont.)

Ngātiwai ki Whangaruru Whenua Topu

To work with hapū in Whangaruru and other community members by providing a Community Hub to facilitate community wellbeing.

Project Hoake

To achieve a healthy, zero unemployment, and a P-Free community within Matakōa by providing culturally appropriate support and mentoring for local whānau-led initiatives and enterprises.

Tuia

An intentional, long-term intergenerational approach aiming to develop the leadership of rangatahi in communities throughout Aotearoa.

International Funders for Indigenous Peoples (IFIP) – Australian Pacific Regional Dialogue

Three members of the J R McKenzie Trust attended the event in September at the Murrook Cultural Centre, Newcastle, Australia.

In the table below are key learnings from the conference:

Funders	Indigenous Peoples
<ul style="list-style-type: none">• Remove barriers for IC (Indigenous Communities) applying for funding• Work alongside IC during the application process• Challenge our processes and systems, asking “Why is this here? And why is it important?”• Sharing power – what does that look like?• What data do funders need?• Provide extra funds to IC to collect data they want to know• Some funders have between 50-100% Indigenous representation on their boards• Replace the ‘Risk’ mindset to ‘Opportunities’	<ul style="list-style-type: none">• No acquittals, no paper reporting, but happy to share our stories and talk about the change in people’s lives.• We are answerable to our families, communities, and ancestors• Givers/funders – donate and trust the people doing the work• Ideal is long-term relationships with funders• We don’t want to replicate colonial practices• We want the right to tell our stories – Truth Telling• There is deep wisdom within



Uncle Bana, Papa Jerry, Rose



Chanda and Chelsea



Lee-Roy and Warren



Peter McKenzie Project

He oranga tamariki, he oranga whānau, he oranga tāngata

Bringing Peter McKenzie's legacy to life



The Peter McKenzie Project (PMP) is named in honour of Peter McKenzie (pictured) who established a \$5 million fund in 1996, the Jayar Trust.

Fifteen years later he seeded the idea of spending it down over a 20-year period on a single issue that could make a substantial and measurable difference to the lives of New Zealanders. In 2012, Peter passed away. It is his vision which has driven PMP.

The focus became impacting child poverty and the wellbeing of children and their whānau. The PMP Committee wanted to move away from ameliorating the effects of poverty, towards “systems change” or “upstream” solutions that would have a significant and enduring impact on the reduction of poverty. While it was apparent to PMP staff and the PMP Committee that upstream work would require both a different funding approach and way of supporting ngā kaikōkiri, it was also evident this was an emerging area; there were very few examples of working in this way which could help guide us on our journey.

As the former Director of PMP, Iain Hines points out: *“The recent interest in the approach is often quite academic; useful, but not always sufficient to guide practitioners. Fortunately, there are some fantastic people in the PMP whānau who have become leaders in the field. They are the first to say there is nothing formulaic about this work, and a reflective approach, tenacity and willingness to live with complexity are all essential.”*

With the impending retirement of Iain who had been with PMP since its inception and had a deep understanding of its history, and to honour the extraordinary legacy of Peter, it was timely for the PMP committee to consider:

How might we best capture and share the depth of history, the people and kaikōkiri involved, and what has been learned along the way? How might this content be easily shared and accessed by the J R McKenzie Trust, the PMP Committee, ngā kaikōkiri, other philanthropic organisation, and wider stakeholders in systems change and child poverty reduction?

The PMP Committee decided to commission Curative to create a legacy website which not only captures the story of this incredible project, it shares what we have been learning together and found useful. It also highlights the mahi, outcomes, and impact of ngā kaikōkiri. It is the website we would have loved to have discovered as we started our PMP voyage. And we hope it will be helpful to others in theirs. Peter had a deep curiosity about what could be achieved with a long-term investment in one field of interest.

As Iain said, “I think Peter – like the rest of us – would have been fascinated with what has unfolded, learned more about helpful approaches to evaluation and measurement, and been inspired with hope by ngā kaikōkiri.”

The website will help show the impact of Peter’s legacy, and how much it has helped unleash. You can visit the website now at petermckenzieproject.org.nz.

The Peter McKenzie Project and Participatory Philanthropy

In 2021 PMP, ngā kaikōkiri and the PMP Committee met together and decided to move towards a participatory philanthropic approach.

While this was a huge step forward for PMP, it was not the seismic shift in direction it first appears.

The PMP Committee had always been courageous, funding ngā kaikōkiri with bold and creative ideas, who wanted to take new, often untested approaches. They took a high-trust grantmaking approach, by and large allocating the funds ngā kaikōkiri asked for and trusting that they would be best placed to decide how to use those resources to progress their work.

Moreover, the PMP Committee had encouraged and participated in a peer-to-peer learning culture in which PMP Committee members and ngā kaikōkiri regularly meet together and talk openly about what they are doing and learning, along with their successes, mistakes, and uncertainties; finding their way together.

So when Lani Evans, a PMP Committee member, shared her report, Participatory Philanthropy, an overview (Evans, 2016) at Mahi Tahī II in March 2022, the participants were ready to take up the challenge. They recognised that the collective insights and contributions of both the PMP Committee members and ngā kaikōkiri would be invaluable – potentially improving both funding processes and decision-making.

While Mahi Tahī II provided an opportunity to have more nuanced conversations about what a participatory philanthropic approach might add to PMP, how ngā

kaikōkiri might want to be involved and how it might impact their work, Mahi Tahī III focused on the nuts and bolts – how this might be structured.

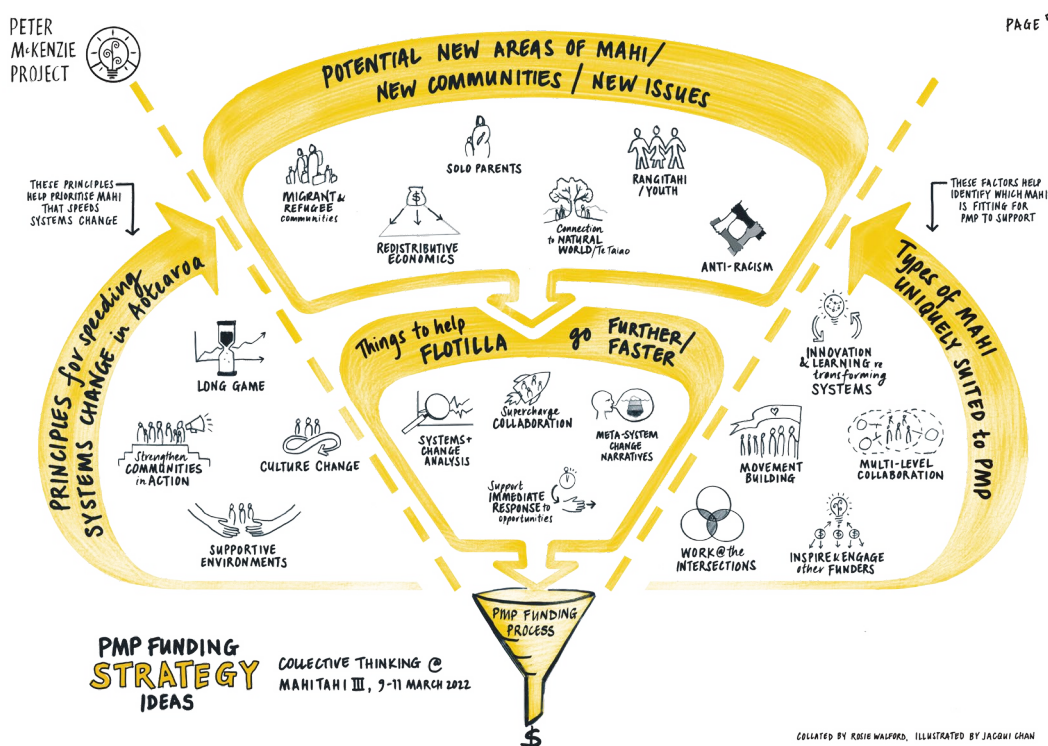
Significant progress was made. The participants:

- developed a set of principles they believed would help prioritise the mahi which would help to speed up systems change work
- identified the factors which help PMP decide the types of mahi to support
- identified the areas of work they would like to support
- developed a “funnelling” process to help assess which new mahi and initiatives might be supported (see graphic)

While the structure is evolving, a sub-group of PMP Committee members and ngā kaikōkiri has been formed, and the terms of reference developed. The māra is now ready and in place.

As PMP Committee Chair Jonathan Usher says, “The move to participatory philanthropy has been really exciting for PMP. The way everyone involved including the PMP Committee, staff and ngā kaikōkiri have embraced this change has been inspirational. We continue to learn so much as we work through this process.”

PMP has taken up the challenge and become a participatory philanthropic funder.



Partnerships & Collaboration Fund

He waka eke noa



The Partnerships and Collaboration Fund sees the J R McKenzie Trust proactively seeking opportunities to work with other funding partners to achieve its goal of being an intentional facilitator of social change. In the year ending 31 March 2022, PCF approved 6 grants (2021 – 10 grants) totalling \$0.59 million (2021 – \$0.91 million).

Partnerships amongst ngā kaikōkiri 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.

LinC Puāwai – Supporting young people to thrive

Puāwai means to blossom, and blossoming is exactly what has happened for the rangatahi who have completed the Christchurch-based Puāwai youth leadership programme, delivered by Leadership Lab. The Puāwai programme works alongside young people from Māori, Pasifika, rainbow, disability, care-experienced, and cross-cultural (including Filipino and Bhutanese) communities.

Puāwai is one of three programmes that make up LinC (pronounced Link), the Leaders in Community project established in the aftermath of the 2011 Christchurch

earthquake. Puāwai was developed specifically for rangatahi aged 15 to 18 years who show potential as leaders but who may be overlooked by their schools for development opportunities because they come from marginalised communities.

“Many of the young people are initially cautious when they first come together. But over time, they really grow in confidence because it’s a safe space for them to discuss their identity and spend time with others like them,” says Tayla Taylor – Puāwai Project Lead.



In addition to activating skills and confidence, Puāwai focuses on diversity and inclusion, weaving connections and belonging. Puāwai participants work in rōpu (small groups), first as individual rōpu, then at monthly hui attended by all rōpu, and finally through a series of ‘activator’ events such as facilitating a public event or organising a service opportunity.

Several rangatahi from the first two Puāwai programmes are now working as junior tuākana (mentors) for the 2022 intake. They are supporting more senior tuākana to deliver the nine-month programme to another 60 rangatahi. Others have become even more deeply involved in their own communities.

“One of the most positive outcomes has been seeing our 12 awesome tuākana who are in their early 20’s and come from the various communities that we focus on in Puāwai. Their development is a huge impact of Puāwai as this is likely to support them into years of future mahi

and contribution to their communities. They also provide credible role models for the rangatahi,” says Chris Jansen – Leadership Lab Co-Director.

He is also keen to ensure that the Puāwai facilitation team, kaiawhina, and steering group receive the recognition they deserve, as this mahi is only possible due to their deep commitment to ensuring this very dynamic and complex programme is a success.

“We are also very grateful to the Todd Foundation, J R McKenzie Trust, and the Ministry of Youth Development for their generous support over three years. The enthusiasm of our funders, who have been very keen to resource this mahi as they believe in the kaupapa, has helped us enormously,” says Chris.

While the COVID-19 pandemic continues to present challenges both in terms of programme delivery and the wellbeing of young people, it’s clear that Puāwai is making a positive difference to young people.

Poutū Pasefika

la tautai o se mata'alia

Ia tautai o se mata'alia

Let the boat be guided by an experienced helmsman

Talofa lava, Mālō e lelei, Ni sa bula vinaka, Kia orana,

Fakalofa lahi atu, Mālo ni, Fakatalofa atu, Mauri, la orana, Halo

Poutū Pasefika is the newest of the J R McKenzie Trust's four pou/communities of interest focused on its vision of "Kia hua mai he whenua ka toko i te tika me to pono he korowai mō Aotearoa / A socially just and inclusive Aotearoa New Zealand." The focus of Poutū Pasefika over the last year has been on the development and completion of the Poutū Pasefika Strategy.

The initial development of the Poutū Pasefika Strategy was informed by the findings of the evidence-based review for the Pacific Peoples Community of Interest Pou undertaken for the Trust by The Cause Collective in November 2020. The latter provided an initial strategic direction for the Trust to consider when prioritising and addressing what the underlying causes of inequity and exclusion may be which prevent Pasefika peoples from reaching their full potential.

The Strategy is a committed response to the review by the Trust to support the Poutū vision that "Pasefika peoples voices are heard, elevated, and supported in a socially just and inclusive Aotearoa New Zealand," and one which is guided by experienced and capable tautai mata'alia – a Samoan term that describes the characteristics of chosen individuals placed at the helm of their respective organisations, and are competent and can be relied on by those they speak and act for. Tautai mata'alia bridge that space between their respective organisations and the Trust. In difficult and challenging situations, tautai mata'alia are chosen and relied upon to guide the organisation/group to achieve their purpose.

The Poutū Pasefika vision nests within the Trust's



Poutū

The strongest pillar in a structure, organisation, or family



Tautai

The navigator



Mata'alia

The person who knows how to steer big double canoes (alia)

purpose of a socially just and inclusive Aotearoa New Zealand. The historical and regional ties between Pasefika, their home nations, and Aotearoa New Zealand are strong and binding. Pasefika contribute much to the economy, wellbeing and social tapestry of Aotearoa New Zealand. The strategy acknowledges that Pasefika in Aotearoa New Zealand are resilient and thrive through the many challenges they have and continue to face. Long-standing disparities in areas such as basic material needs, lower incomes, fewer assets, health, education and housing highlight and compound inequities.

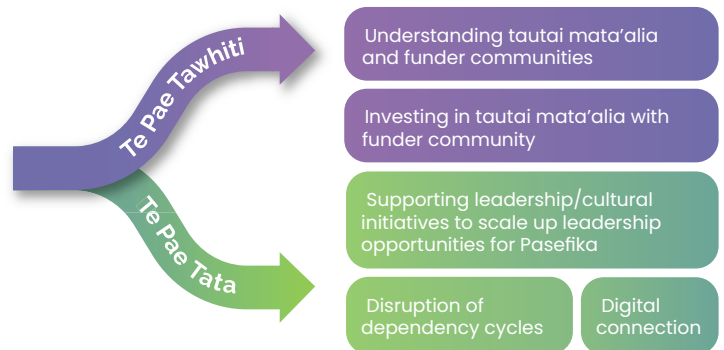
Furthermore, efforts to address inequities are constrained by numerous factors including focus, scale, capacity, capability. The two areas where Poutū Pasefika will direct the Trust's attention are:

- Focus and scale of investments and capacity and capability of Pasefika organisations and groups. Investment will be proactive and in larger initiatives to deliver outcomes that have deep and enduring impacts.
- Developing and strengthening the capability of Pasefika organisations through robust relationships with suitable co-funders and supporters.

Priorities

- 1 Support community innovation, voice, and leadership
- 2 Strengthen collaboration and support collective action
- 3 Grow capacity to progress system-focused solutions

Investments



Poutū Pasefika Principles

By Pasefika for Pasefika



Support Pasefika values of Alofa, Family, Reciprocity, and Spirituality



Build support and maintain relationships

Acknowledgements

He Kupu Whakamihi

With thanks to

The J R McKenzie Trust Board of Trustees



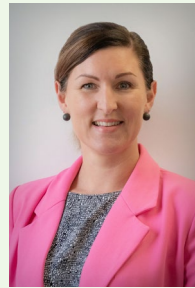
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Rangatira Investments



Rangatira Investments is Aotearoa New Zealand's leading long-term investor in private business and has a rich and productive history of investing in leading New Zealand companies.

Rangatira Investments was founded by Sir J R McKenzie in 1937, with its initial holding a majority interest in the McKenzie department store chain. Sir John set up Rangatira Investments to enable its shares to be gifted to charitable trusts, principally the J R McKenzie Trust.

We sincerely thank Rangatira for its stellar performance and support, providing an average return on our investment of 12.4% pa over the last 10 years. This has enabled the Trust to continue investing in communities across Aotearoa New Zealand.

McKenzie Room Update

The J R McKenzie Trust has a rich and unique history. We were delighted to be able to tell our story through a visual timeline which features on the walls of our boardroom. From the vision demonstrated by Sir John to the strategic evolution enabled by Sir Roy, and through to the ongoing commitment of the McKenzie Family, the Trust's story is now available for all our visitors to see.



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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.