



**J R MCKENZIE TRUST**  
ESTABLISHED IN 1940



# ANNUAL REPORT

## Pūrongo Pūtea a Tau

# 2012



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

## For more information...

### Kia whai māramatanga anō ...

- About applying for a grant
- Audited accounts 2011-12
- Rangatira Limited Annual Report

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

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Cover photo: Left to right: Chevi Paewhenua, Johny Ripene, Hemi Paewhenua, Pae Paewhenua, Peter Simmis, Ngā Kanohi Marae o Wairarapa's Marae Based Trades Training, at Te Heru Marae, Masterton, September 2012.



# Welcome — Nau mai

## J R MCKENZIE TRUST

ESTABLISHED IN 1940

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

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

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

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

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

Today the Trust's vision is:

“A socially just and inclusive Aotearoa New Zealand”

“Kia hua mai he whenua e toko ake ana i te tika me te pono hei korowai mo te hapori i Aotearoa.”

Our main focuses are disadvantaged children and their families, and Māori development.

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

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

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

“Iti noa ana, he pito mata”.

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



### TRUSTEES AND STAFF:

*Left to right: David Vance (Wellington), Marama Takao (Māori Development Advisor), Iain Hines (Executive Director), Joan Smith (Wellington), Sam Caldwell (Grants and Programme Advisor), Liz Tanielu (Wellington), Christopher McKenzie (Christchurch), Alison Glen (Trust Administrator), Tricia Walbridge (Outgoing, Wellington), Pania Ellison (Outgoing, Ōtaki), Eric Keys (Auckland), Radha Balakrishnan (Outgoing Chair, Wellington), Julia Carr (Wellington), Patrick Cummings (Incoming Chair, Hamilton), Warren Lindberg (Outgoing, Auckland), Che Wilson (Ohakune), Lyn Holmes (Christchurch), Charles Wilson (Auckland), Manaia King (Auckland). Inset: Puawai Wereta (Taupō), Neville Caird (Dunedin)*



## Chair's report 2012 — Pūrongo a te Tumuaki 2012



**2012 has seen the Trust focus on bedding in its strategic plan. Our focus this year has been on ensuring the administrative and reporting systems we have in place support and enhance our new ways of working.**

With fewer new major grants every year we have chosen applications which have strong alignment with the Trust's goals, and have potential to have significant impact. The Board is very mindful that many worthy applications from well-established organisations do not get chosen. Our emphasis is on choosing grants where funding and support from the Trust is likely to make an important difference.

This year the Board has focussed its time and energy on the information that the Board and staff receive from grantees – from proposal, to assessment and reporting. The Board has stressed the importance of the systematic collection, organisation and critical analysis of information from grantees. This will assist the Trust to maximise its contribution to a socially just and inclusive Aotearoa.

This year, the Board also confirmed its monitoring and

evaluation framework to assess the impact of its strategic direction.

The Te Kāwai Toro Committee is taking a thoughtful and strategic approach to the proactive contribution it will make to Māori development in coming years. Building on research it has commissioned, it has developed a strategy to guide the coming years' activities.

The Connecting Education and Communities programme supports better educational outcomes for disadvantaged children. We have selected three initiatives in the field around the country and are working through ways in which we can assist the field more broadly.

This year, both Lady Shirley McKenzie and Peter McKenzie have died. Both contributed over many years to the Family's tradition of generosity. Shirley was the family lynch pin, and involved in several charities, and Peter was a J R McKenzie Trustee for 13 years. We remember them with gratitude and affection.

Peter McKenzie was also instrumental in establishing the Jayar Charitable Trust Trust, an investment entity stewarding funds for distribution by J R McKenzie Trust. Before he died, he proposed that the capital fund be 'spent down' over 20 years on a specific focus. This will allow a purposeful, long-term approach, complementing the Trust's short to medium term activities described above – grants and specific workstreams. Both Trusts accepted Peter's proposal. It is a rare and exciting opportunity, one we are determined to maximise. Work is underway on this innovative proposal.

I want to acknowledge and thank the people who make the Trust's work possible. Volunteers are vital to the Trust's work – Board members, others throughout the country who contribute to our work, and beyond them many others who give freely of their advice. The Deaf Development Fund is entirely volunteer-run. We rely heavily on our small staff team. Thanks also to our investors – Rangatira Limited and the Jayar Charitable Trust.

My term on the Trust is about to end. I've been privileged and proud to be involved for 16 years. Other Trustees who are completing their terms – all at least of 10 years – are Tricia Walbridge, Pania Ellison, and Warren Lindberg. We thank them all very sincerely for their many contributions, including to the reshaping of the Trust's strategy and operations, involvement in Māori development, and the support and management of our volunteers.

This year we used a new process to find new Trustees. We were overwhelmed with the response we received. 76 highly qualified and committed people put themselves forward for these unpaid positions. This is a wonderful testament to the McKenzie legacy.

We would like to welcome our new Trustees – Liz Tanielu, Joan Smith, Puawai Wereta and Manaia King.

The Trust exists thanks to the foresight and generosity of the McKenzie Family. It is our responsibility to apply the spirit of their legacy to today's world.

*Radha Balakrishnan, Chair*

# Obituaries

**This year two members of the McKenzie family died.**

Kua karangatia ō tātou pūkōrero, kua tangohia atu ngā manu tīoriori, kua pāngia ō tātou mate e te ringa kaha o aituā.

## Lady Shirley McKenzie

Shirley was a pivotal and dearly loved family member. She was the family lynch pin, and made it possible for Sir Roy and their children Peter, Robyn and John to get on with their philanthropic and other work.

Shirley was also active in a number of charities. For many years she was a member of the Women’s Auxiliary of Wellington Free Ambulance. She was a local committee member of Birthright, and the national Patron. Deaf Aotearoa grants a scholarship in her name. She was also Patron of the McKenzie Centre, and of Te Omanga Hospice.

Shirley was thoughtful, humorous, modest and refreshingly down-to-earth. In Robyn’s words, “She just got on and did it”.



## Peter McKenzie

Peter served as a J R McKenzie Trustee from 1993 until 2005. He brought a deep knowledge of the Trust’s history, and was a pragmatic, independent thinker. He led a thorough review of the Trust Deed.

He set up and chaired the Jayar Charitable Trust. Before he died he put forward a visionary and ground-breaking idea for the future use of this fund.



Peter gave a large slice of his personal inheritance to establish Ngā Manu Nature Reserve in Waikanae. He developed the land, established its educational programme, and became a pioneer in conservation, including kiwi breeding and tuatara recovery programmes. It was fitting that Peter’s funeral was held in the beautiful Ngā Manu reserve.

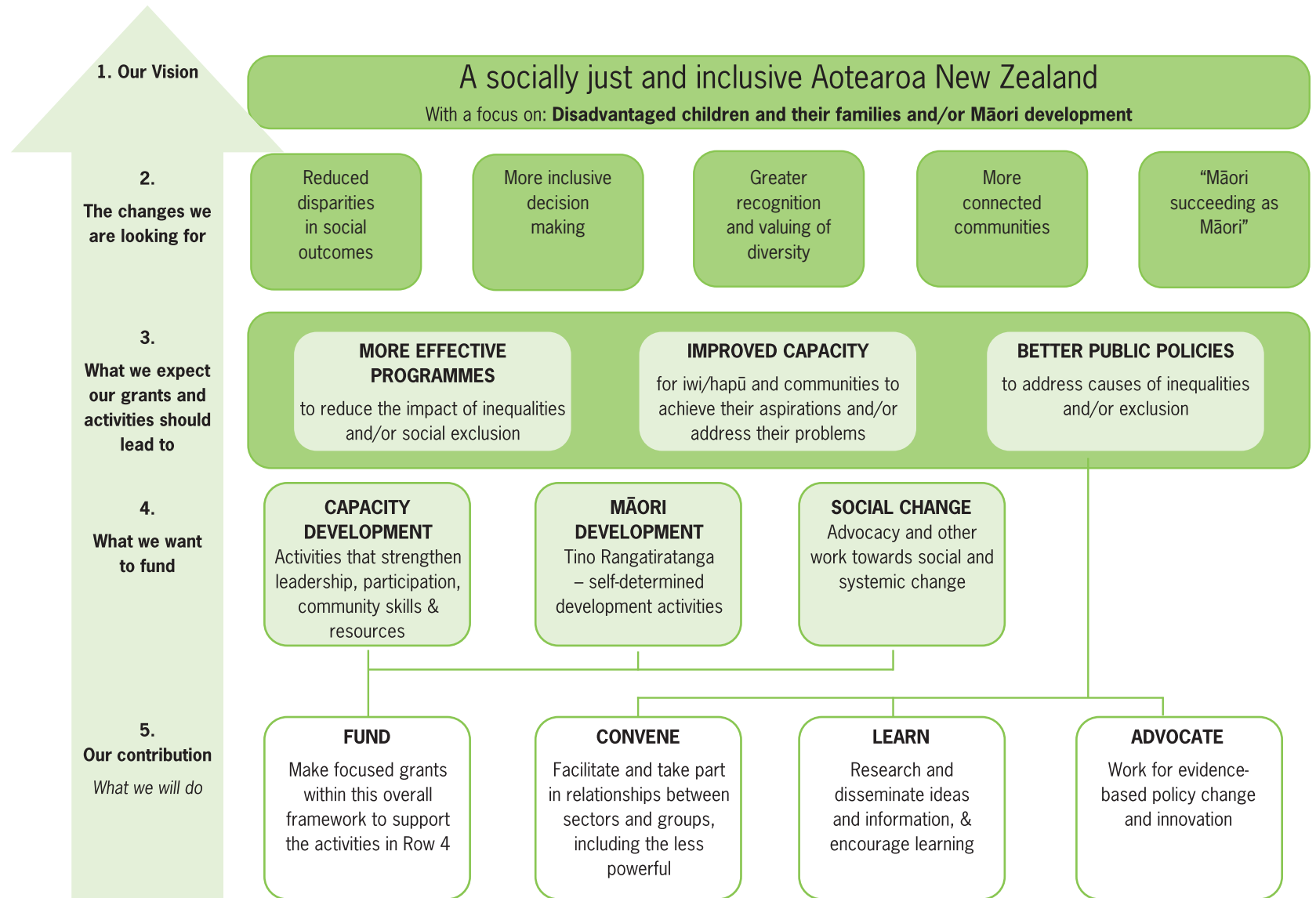
Peter was also a Director of Rangatira Limited, and of some of its associated companies, for many years.

Peter was an outstanding ‘all-rounder’ with a notable sense of humour. His son Christopher is now a J R McKenzie Trustee.



# Our strategy 2010–2014 — Tō mātou rautaki

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



# Building a future for rangatahi Māori

**N**gā Kanohi Marae o Wairarapa (NKMOW) is providing young people with the skills, knowledge and support they need to build a future for themselves and their communities.

Established in 2002, NKMOW is a collective of 7 marae in the Wairarapa who have developed a Marae Based Trades Training initiative which targets rangatahi/ youth from the ages of 16-24. Now in its fourth year of Marae Based Trades Training, NKMOW has had over 60 trainees come through its doors. Trainees are referred from marae, youth agencies, youth justice, colleges and whānau within the Hapū/Iwi structures, as well as off the street.

Success for NKMOW and its Marae Based Trades Training programme is measured against the following outcomes:

- Completion of the course,
- Transition to employment,
- Transition to apprenticeship,
- Further study.

The Marae Based Trades Training programme has been achieving great results, but there was a common realisation that issues existed around the governance and policy of the organisation. With support from the J R McKenzie Trust, NKMOW has taken steps to effectively deal with these issues and set a clear strategic direction for the future.

NKMOW is now building on the successes of Marae Based Trades Training: increasing the variety of courses offered and developing its Pastoral Care service, which is making all the difference. Pastoral Care is an important element of NKMOW's work, and what makes it



*Erection of a carving at Te Heru Marae: Denis Carrol, Pae Paewhenua, Johnny Ripene, Hemi Paewhenua, Emmilio Menzies, Layton Thornton, Jacob Wade-White and Peter Simmis learn units covering paving, block laying, retaining wall construction and minor concrete works*

different to many other training schemes. Taking a youth focused approach, NKMOW is willing to go the extra mile. With courses taught on a marae and incorporating appropriate tikanga, their work is kaupapa Māori driven and whānau/community based. These networks of support are allowing NKMOW to make a real difference in the lives of young people.

A renewed focus is apparent amongst all who are on board, and the Marae Based Trades Training programme now has the ability to take advantage of opportunities going forward.

*“Taking a youth focused approach, NKMOW is willing to go the extra mile.”*



## Better health for refugee families

**R**efugee Services has been piloting a household focussed health and wellbeing project with the Bhutanese, Burmese and Colombian refugee communities in the Wellington and Manawatu regions.

This work aims to improve their health outcomes by identifying key health issues for recently arrived refugee families and providing them with health education.

The project has been carried out in three phases: recruitment and training for the community health workers; a baseline survey to identify the current health situation of participants; and education sessions during home visits and workshops. Appropriate education materials have been developed for the visits and workshops.

Bi-lingual community health workers, who are from the same community as their target population, have worked with nearly a thousand people, including about 350 pre-school and school age children, during the first ten months of this project. They provide primary health consumer education and identify situations where people may need further support. Families are referred on to relevant services including Plunket, screening

services and the dentist. The community health workers are supervised by two public health nurses.

Dr Demissie Diressie, Refugee Services project advisor says the work “has been invaluable as it has gathered a comprehensive range of health-related statistical data about refugee households and is providing an opportunity to address the gaps in households’ knowledge, attitude and practice regarding their health and wellbeing. Analysis of the follow-up survey, which will be carried out in 2013, will allow us to measure the household changes in their knowledge about, attitude towards and use of health and community wellbeing services as a result of the household visits and workshops.”

Positive aspects of this pilot are the cooperative relationships developed with primary health services in the Manawatu and Wellington region, and their willingness to find out how they can better support refugees. This support includes an increased use of language support at appointments.

The plan for 2013 is to promote this project with District Health Boards as a good practice model for working not only with refugee communities, but also with other vulnerable and ‘hard to reach’ clients with poor health outcomes.



Photos: Top: A health and wellbeing workshop in Naenae. Centre: A young girl in a refugee household follows health advice in Palmerston North. Bottom: Refugee Services volunteers

*“The plan for 2013 is to promote this project with District Health Boards as a good practice model for working not only with refugee communities, but also with other vulnerable and ‘hard to reach’ clients with poor health outcomes.”*



# Huihuitia ō tātou ritenga; whakanuia ō tātou rerekētanga

Gather up what we share in common; celebrate where we differ from each other

**T**he first question any new parent asks... “Is it a boy or a girl?” But what happens when doctors can’t answer that question?

Approximately 1 in every 2000 live births, a child is born whose body is not considered typically male or female. Across the millennia human society has responded in a variety of ways to this naturally occurring reality.

The **Intersex Trust of Aotearoa** was founded in 1996 to bring visibility to an issue surrounded by secrecy and shame; to provide education and workshops with the goal of ensuring appropriate, respectful treatment and choices for all intersex people, their whānau and loved ones.

This year we have had the wonderful pleasure of bringing the NZ on Air funded documentary *Intersexion* to the silver screen. The film, by kiwis Grant Lahood and John Keir and featuring Intersex Trust CEO Mani Mitchell, explores the life of intersex people around the world. *Intersexion* won best edit and best NZ documentary at this year’s DOC EDGE festival. The

‘glitter fab’ celebration at premieres in Auckland and Wellington exemplified how the Intersex Trust’s work is moving this issue into a new place of reflection and conversation.

The film has gone on to international festivals, is being used in workshops both here and overseas, and is screening on international Air New Zealand flights.

This year the Intersex Trust has partnered with a number of organizations to foster work and awareness across a number of sectors. They have worked with Rainbow Youth in Auckland to support the running of this year’s QSA hui pūtahi at Tapu Te Ranga Marae in Wellington.

Long running collaborations with the NZ Human Rights Commission, Whanganui Women’s Health Collective and Working it Out in Tasmania have continued. One of this year’s highlights was the visit of Sharon Jones, Australia’s first professional female shearer and now a leading gender variant and human rights activist.

Mani has presented, along with board members such as Dr Jeanie Douche and Dame Margaret Sparrow, to a range of audiences, from the National College



*Top, Sharon Jones and Mani Mitchell working together at an awareness raising workshop; bottom, the QSA hui: a celebration of diversity for queer youth and their allies*

of Midwives biennial conference to the University of the Third Age (which provides continuing learning opportunities for retired people).

Mani reflects that “our partnership with the J R McKenzie Trust has enabled a significant deepening and expansion of our work both in New Zealand and across an international stage, for this we are grateful. The issue of how we deal well with human difference, what ever its origin, is something that effects all of us.”



*Intersex Trust and QSA members at Tapu Te Ranga Marae*



*Intersex Trust CEO Mani Mitchell*



# Building whānau and family engagement to support better educational outcomes

Whilst most of our funds are distributed in response to applications, in recent years the Trust has set aside some of its resources to work proactively – to focus on a certain issue and address this using all the “tools in the toolbox”: collaboration with other funders and organisations, inviting people together, research, work to improve public policy and so on, as well as grants.

One example of this is our work around the theme of ‘Connecting Education and Communities’.

We aim to support activity which builds whānau and community engagement in education, supporting better educational outcomes for disadvantaged children. This may also incorporate community development centring on education.

We are taking a multi-level approach, aiming to:

1. Support innovative, ‘on-the-ground’ work in a small number of communities
2. Strengthen the field by bringing people together to share knowledge and inspire others

3. Improve the public policy context through advocacy and communications

So far, we have offered funding to three organisations:

**North East Valley Education Council** was started in 2007 by local educators in North East Valley, Dunedin, who wanted to better engage children in learning by addressing the root causes of disengagement, building community in the area served by local schools. Our grant has funded the appointment of Stephen Alexander as a Child and Family Facilitator. Stephen’s role includes coordinating the connections between schools, preschools and the community; developing and managing a volunteer database; and supporting the Education Council.

The **Horowhenua Pasifika Education Initiative** in Levin is focused on engaging “hard to reach” Pasifika families in early childhood education and throughout their transition to school. The initiative employs two coordinators, Joh Lomu from the Tongan community and Vasega Talai from the Samoan community, to provide appropriate support so families can make informed

decisions, leading to on-going success in education and further learning opportunities for their children.

**Te Huarahi** in Pukekohe was started in 2009 with an overarching vision of “schools and whānau working together to improve educational outcomes for Māori”. Te Huarahi has developed a strategic PATH to achieve this vision, setting clear objectives around early childhood education, whānau education, celebrating success, building authentic relationships and raising achievement.



The North East Valley Education Council



Left, Joh Lomu and Vasega Talai of the Horowhenua Pasifika Education Initiative. Middle, the PATH. Right, Jill Courteaud and Nikki Tarapa of Te Huarahi



## Building a model of Māori development

Like many whānau and hapū, the Matekuare Whānau at Te Whāiti, on the western borders of the Urewera mountains, own a small block of Māori freehold land. Over the last few years the whānau have been planning the long term development of their land once the current 42 year lease runs out. As well as farming, this will include a Papakāinga that will secure the long term future for generations to come.

During a recent land inspection they noticed that something was wrong as the farmer that leases the land drove up in a brand new Land Cruiser whilst they, the owners of the land, drive an old wreck with no windows and no starter!

The **Whānau Enterprise Development Trust** was established to change this situation, providing a model of how small blocks of land can be developed as viable agricultural enterprises, for the benefit of communities.

The Whānau Enterprise Development Trust has enabled the Matekuare Whānau to develop the

infrastructure and buildings needed to establish a thriving farm enterprise. So far, wetlands have been restored and a native plant nursery has been established; a former Presbyterian church has been converted into a community church and centre, including a school room; and an Agricultural Centre has been built, forming the basis for dairying, home-kill and butchery, and other agricultural enterprises. Already, the project has generated employment for six people, and engaged dozens more in community wānanga.

But crucially, the Whānau Enterprise Development Trust isn't just about benefiting one small community. The Trust has also been established to share with others the knowledge of how

to develop small Māori land blocks for community benefit. The enterprise at Te Whāiti will serve as a model and as a school. The Trust is working with the Waiariki Institute of Technology with the aim of developing NZQA accredited units to be delivered on site in Te Whāiti, and has developed a website to share their experience with communities across New Zealand ([www.tewhaiti.co.nz](http://www.tewhaiti.co.nz)).

Tony Goodman from the Whānau Enterprise Development Trust says that what projects such as this need is vision. "Work out where you want to go," he says. "First look back and see where you've come from, then look forward and develop a plan; but always keep focused on what you want to achieve."



Photos, from top: Georgina Harvey, Millie Te Kaawa, Hinerangi Goodman, Wakely Matekuare, Tom Hawea, Wayne Te Kaawa, Sam Rangiahua, Polly Tamepo, Erena Manihera and Lucy Houia mark the opening of the new church; Sam, Toby, Michelle and Jeremy installing water supply for the native plant nursery; Toby, Robin, Brendon, Tumuaki, Rangiaho constructing new walkway gateway to the church; the restored wetlands



## A model for tomorrow

**T**he **Constitutional Transformation Working Group (CTWG)** was established by the **National Iwi Chairs' Forum**, sponsored by **Margaret Mutu**, to provide advice to them on **Constitutional Transformation** and develop a **model constitution for Aotearoa New Zealand**.

The CTWG project, convened by Moana Jackson, will continue until 2013 and include engaging with whānau, hapū, iwi and Māori communities. The long term aim of this project is for Aotearoa to undergo constitutional transformation and achieve the fair and just society guaranteed by the Treaty of Waitangi.

A constitution is simply the values, rules and institutions through which people govern themselves. Every culture develops and implements its own. If the Treaty of Waitangi is our “founding document”, as so many say it is, then we need to consider what sort of constitution might be founded upon it: the issue then is not how the Treaty might fit into a constitution, but how a constitution might be based upon the Treaty.

So far there have been 67 engagement hui held around the country (far exceeding the 30 community hui planned).

In March 2012, a Rōpū Rangatahi was formed to engage other young people nationwide. Participating rangatahi were from Auckland, Taneatua, Gisborne, Napier, Palmerston North, Whanganui and Ōtaki. They undertook presentation training, with an emphasis on

how to engage the thoughts and aspirations of rangatahi on constitutional transformation in Aotearoa.

The feedback collected from young people will help inform the work of the CTWG to develop a model constitution. The rangatahi group has already held 28 separate hui with young people to date.



*Photos, clockwise from bottom right: Participants at the national rangatahi hui, Tapu Te Ranga Marae, Wellington; Rangatahi brainstorming the presentation kaupapa; Moana Jackson; Participants at an engagement hui, Waipapa Marae, Auckland*

## Learning about learning — Ko ō mātou akoranga i tēnei tau

**L**ike many others seeking to contribute to social change, we have been trying to figure out a way of understanding the overall impact of our activities. We want to know what difference we are making. As far as we can tell, is our work contributing to the differences we want to make? Are there more effective ways of using our resources?

We hope that the groups we support are trying to answer these questions too.

However, for community organisations and funders alike, this is not nearly as simple as it sounds! Social issues are complex and 'joined up'; isolating the effect of any one organisation's work is difficult, even with a much bigger budget than we can muster. This is especially true when we are looking to contribute to long term change. One expert told us, "You won't know your outcomes for another 25-30 years!"

As one of our Trustees said, "Evaluation is very difficult – to a great extent we have to accept that frustration and live with it."

On the other hand, it's too important to give up. Monitoring and evaluation can help in many ways. It can help identify what appears to be effective, and where possible *improve* what we do – perhaps more than *prove* its value.

We are continually working on what is the right balance for us. In short, our main focus is on *learning*, for those undertaking the work, others doing similar work, funders (including us), and others. We have reviewed the way we gather and use information. We have built into our work a number of activities designed to help us analyse the information we are receiving, reflect on it, and improve. We already believe that having a multi-year planning cycle helps a lot.

We also expect the organisations that the Trust supports with major grants to be monitoring and evaluating their own work in ways that assist their learning. We do not tell them how they should do it, but we are willing to offer assistance as they work it out. Where there are identified participants or service users, we'd expect their views to be included in some way.

We've already learned this learning business is not straightforward!

This year the Tindall Foundation kindly invited our Executive Director to spend a few weeks with them, observing their work. This proved to be a very valuable learning opportunity: through comparing how similar organisations operate, one gains more perspective and new ideas.

*"We want to know what difference we are making. As far as we can tell, is our work contributing to the differences we want to make? Are there more effective ways of using our resources?"*

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



## How to apply for a grant

**T**he Trust has a two-stage funding process. The first stage is a brief outline application completed on our website. This is designed to give us an idea of what you would like to achieve, and what you will do. It is designed to be reasonably quick for you to complete and for us to process.

If your application is short-listed, a team from the J R McKenzie Trust will visit you, and you will be asked to submit further information, including more detailed plans.

The closing dates for applications in 2013 are 22 February and 12 July.

### What our grants are for

We want to contribute to longer term change – this means building a society where fewer people are in dire straits, and where there is less need for health and social services over time.

In a socially just and inclusive society:

- all individuals and groups receive fair treatment and a fair share;
- they can participate significantly in decisions affecting their lives;
- their contributions are valued.

We certainly don't think we can make this happen on our own, but believe we can contribute.

### Our two main focuses:

#### **Disadvantaged children and their families**

Children are disproportionately affected by poverty and disadvantage. Acting early with children who have a high chance of not doing well, and their caregivers, is more effective than leaving things to later.

#### **Māori development**

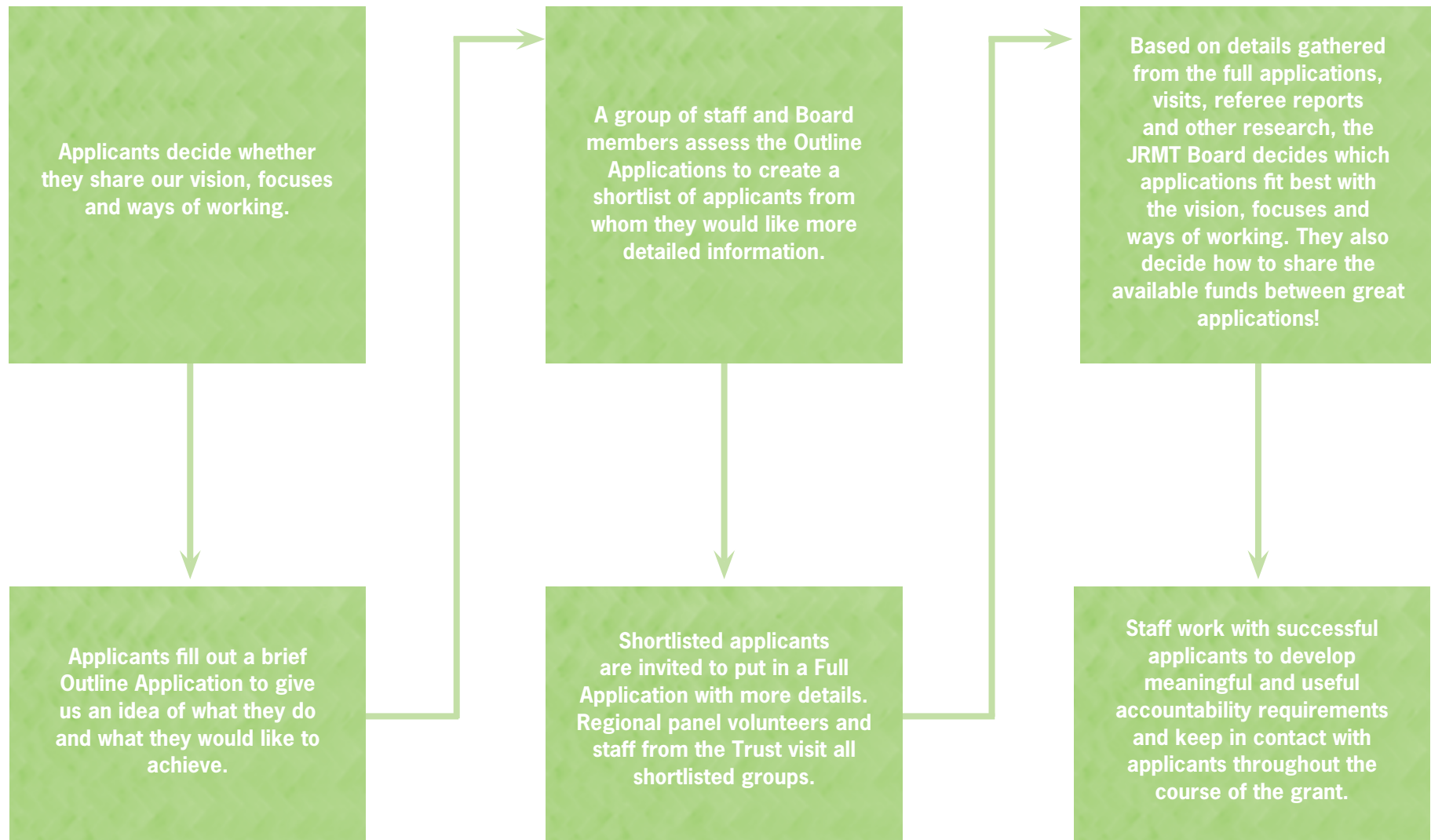
Māori are the first people of our nation, and an increasing proportion of the population. Many health and social indicators show that Māori trail non-Māori. While the disparities have closed in some areas there is much still to do. Successful Māori development is a gain for all New Zealanders.

#### **We especially support these ways of working:**

- Capacity development – Activities that strengthen leadership, participation and/or community skills and resources;
- Māori development – Tino rangitiratanga /self-determined development activities;
- Social change – Advocacy and other work towards social and systemic change.

*The closing dates for applications in 2013 are 22 February and 12 July.*

## How the process works



# Grants made so far in the year ending 31 March 2013 — Ko ngā takoha āwhina kua tuku

Dollars show grants already paid this year. Years refer to the duration of the Trust's commitment.

## **ACTION FOR CHILDREN AND YOUTH AOTEAROA**

**ACYA** Advocacy to maximise government compliance with UN Convention on the Rights of the Child — operating and project costs, Year 2 of 5 \$20,000.00

**AUCKLAND CITY MISSION** Contribution to the analysis and dissemination of Family 100, a ground-breaking research project on the lived realities of poverty and engaging with social service providers, Year 1 of 1 \$100,000.00

**AUCKLAND REGIONAL MIGRANT SERVICES CHARITABLE TRUST** Facilitation of ARMS' social enterprise activities with refugee and migrant women, Year 1 of 3 \$86,457.00

**CHANGEMAKERS REFUGEE FORUM** Work to reduce family violence among refugee-background communities living in the greater Wellington region, Year 1 of 1 \$20,000.00

**CHILD POVERTY ACTION GROUP** Supporting CPAG's work to eliminate child poverty in New Zealand – salaries and associated costs for administration and research, Year 1 of 2 \$112,000.00

**CONSTITUTIONAL TRANSFORMATION WORKING GROUP** To engage with Māori and develop a model constitution for our country based on kawa and tikanga, Year 2 of 2 \$180,000.00

**EMERGE SUPPORTED EMPLOYMENT TRUST** Transition parenting circles, supporting parents of young people with disability, Year 2 of 3 \$5,000.00

**HOROWHENUA PASIFIKA EDUCATION INITIATIVE** Engaging "hard to reach" Pasifika families in early childhood education and throughout their transition to school, Year 2 of 3 \$50,000.00

**INTERSEX TRUST OF AOTEAROA** Advocacy and education work to increase awareness and understanding about intersex conditions, Year 2 of 3 \$90,000.00

**J R MCKENZIE YOUTH EDUCATION FUND** The YEF makes small grants to individuals and families for children's educational costs; administered by Rotary \$180,000.00

**JOBS RESEARCH TRUST** Launching of 'How Communities Heal', a book by vivian Hutchinson, Year 1 of 1 \$500.00

**KAI TECH CHARITABLE TRUST** Establishment of a kaupapa Māori support and development centre for rangatahi in Waihōpai Invercargill, Year 2 of 2 \$66,612.50

**MANCHESTER HOUSE SOCIAL SERVICES SOCIETY INC** Provision of a wrap around service for young families breaking the cycle of intergenerational social dependency, Year 2 of 4 \$5,000.00

**MARY POTTER HOSPICE** Donation on the passing of Peter McKenzie, Year 1 of 1 \$3,000.00

**MERIVALE COMMUNITY INC.** Community workers to identify street leaders, and work with them under the Puahou model to develop and implement a street plan, Year 1 of 2 \$42,622.00

**NEW ZEALAND COUNCIL OF CHRISTIAN SOCIAL SERVICES (NZCCSS)** Operating costs to support the Whakatata Mai — Closer Together campaign, advocating for greater equality and inclusion for vulnerable New Zealanders, Year 2 of 2 \$10,000.00

**NGĀ HONONGA MARAE** Towards community economic development in the middle region of the Whanganui River, Year 2 of 3 \$78,101.44

**NGĀ KANOHI MARAE O WAIRARAPA** Rangatahi Tū, Rangatahi Ora: a marae based trades training to employment programme targeting Wairarapa Māori youth, Year 1 of 2 \$126,697.50

**NGĀ MANU TRUST** Donation on the passing of Lady Shirley McKenzie, Year 1 of 1 \$1,000.00

**NORTH EAST VALLEY EDUCATION COUNCIL** To build community and increase family-school engagement, producing better learning outcomes, Year 2 of 3 \$50,000.00

**P3 FOUNDATION** Running the Social Enterprise Competition to empower and enable youth to solve community problems, Year 1 of 1 \$3,000.00

**REFUGEE SERVICES AOTEAROA NEW ZEALAND** Building refugee households' health capacity, facilitated by culturally competent and responsive health promoters, Year 2 of 2 \$100,000.00

**ROBSON HANAN TRUST** Rethinking Crime and Punishment – justice reform advocacy, Year 1 of 3 \$69,000.00

**SEABROOK MCKENZIE TRUST** Assisting those with Specific Learning Disabilities and their families through direct provision of services and by fostering community awareness \$1,000.00

**IMAGINE BETTER** Towards the Family Leadership Strategy, which raises the expectations that many have for the lives of disabled people and helps people achieve them, Year 3 of 3 \$112,725.50

**STREETS AHEAD 237** Towards programmes with young people in Porirua — salaries and office overheads, Year 2 of 3 \$125,000.00



# na atu tae noa ki tēnei wā i te tau pūtea e mutu ana a te 31 o Poutūterangi, 2013

**TE ARA TIKA O TE WHĀNAU TRUST** *Whānau development within the Notorious chapter of the Mongrel Mob, to prevent patterns of intergenerational offending, to help their children to succeed in education and be involved in a pro-social way in their community, Year 2 of 2* \$145,000.00

**TE HUARAHI** *Schools and whānau working together to improve educational outcomes for Māori in Pukehoe, Year 2 of 4* \$3,680.00

**TE MANU TOROA TRUST** *Tuakana-Teina Teen Parent programme – mentoring, peer support and good role modelling for new parents, Year 1 of 1* \$60,000.00

**TE MAURI TAU** *Developing and expanding the wider delivery of a non-violent parenting programme model anchored within Māori culture, Year 1 of 3* \$102,882.00

**TE ORA HOU AOTEAROA** *Supporting He Toa Takitini: Creating Strong Communities of Care within Whanganui and Gisborne, Year 3 of 3* \$76,667.00

**TE RŌPŌ PAKIHI INC SOCIETY** *2040, Kia Māori 24/7: To maximise the prospects of survival of Māori as a people through the expression of kaupapa tuku iho: values inherited from tūpuna Māori, Year 1 of 2* \$150,000.00

**TE RŪNANGA A IWI O NGĀPUHI** *Creating and delivering toolboxes for building Marae capacity and capability, Year 1 of 2* \$11,000.00

**TE RŪNANGA O NGĀI TAHU** *Creating a bilingual, online financial literacy resource designed for Māori around the country, Year 2 of 2* \$15,000.00

**TE WAKA KAI ORA** *Promoting the growing and consumption of healthy food in Māori communities, Year 2 of 2* \$10,000

**TE WĀNANGA O RAUKAWA** *Producing a resource of Ngāti Raukawa kaumātua interviews on mātauranga and kaitiakitanga, Year 1 of 2* \$10,000.00

**THE HEARING HOUSE** *Extending access to services by setting up therapy and training by video conference and starting a clinic in South Auckland, Year 3 of 3* \$35,000.00

**THE NEW ZEALAND ETHNIC EMPLOYMENT EDUCATION AND YOUTH DEVELOPMENT CHARITABLE TRUST** *An educational catch-up programme for intermediate and high school students from refugee backgrounds in Auckland, Year 3 of 3* \$60,000.00

**TUMANAKO O KAITAIA KOHANGA REO TRUST** *To complete a rammed earth whare as a prototype for other whānau, including a guideline document, Year 1 of 1* \$10,000.00

**WELLINGTON COMMUNITY JUSTICE PROJECT** *Providing contact and support for youth residents at CYF Care and Protection Residence, Eponi, Lower Hutt, Year 1 of 1* \$1,000.00

**WESLEY COMMUNITY ACTION** *To employ a female community co-worker to work with wāhine in 'hard to reach' whānau: primarily, the Black Power community in Wellington, Year 2 of 3* \$36,000.00

**WEST FONON HEALTH TRUST** *Gardening and nutrition programme for Pacific families to grow their own vegetables and nutrition education, Year 1 of 1* \$10,000.00

**WHĀNAU ENTERPRISE DEVELOPMENT TRUST** *Developing a small farm business on Māori land in Te Whāiti, Bay of Plenty, and establishing a training centre for whānau/hapū around the country, Year 2 of 3* \$69,300.00

**WORKING TOGETHER MORE FUND**, *A joint venture with 4 other funders to promote and enable collaboration among community groups* \$100,000.00

## DEAF DEVELOPMENT FUND

**J MACPHERSON** *Towards professional development as a Resource Teacher of the Deaf to attend a two-day course on "Hot Topics in Bilingual Education for Students with Hearing Loss".* \$1,000

**NZ SIGN LANGUAGE TUTORS ASSOC. NATIONAL CONFERENCE JULY 2012** *Grant towards bringing guest speaker Ben Lewis from USA to attend their conference on resources in sign language* \$2,000

**LIVING SPRINGS TRUST** *Deaf Parent 2nd Conference 2013. Deposit to secure accommodation. A further grant will be given to this conference earlier next year* \$1,000

**J MASTERS** *The Hamilton Deaf Unit 50th Reunion Anniversary – Display Materials* \$400

**DEAF SOCIETY OF CANTERBURY** *Towards air fares for the President and Vice President to attend a weekend meeting of all Presidents and Vice Presidents of the Deaf Societies in New Zealand* \$790



## Where does the money come from?

### Rangatira Limited

**R**angatira is a Wellington-based investment company with assets of over \$150 million.

Established in 1937 by Sir John McKenzie, the Company is 51% owned by the JR McKenzie Trust with other community and charitable organisations owning another 15% of the shares. The balance of the shares is owned by private investors. Over the years, Sir John and other family members have gifted shares in Rangatira to the J R McKenzie Trust, the J R McKenzie Youth Education Fund, and other charities.

Rangatira's mission is to increase both the capital value of its shares and the dividends paid to its shareholders by investing creatively and competitively.

Rangatira has built a portfolio of local and international investments across a wide range of sectors. The company is strictly commercial in its investment approach and benchmarks its performance against the wider investment community.

Rangatira continues to explore investment opportunities across a range of business sectors. The company aims to add value to its unlisted investments by actively contributing at management and board level, recognising the need to combine high standards of governance with sound management and a clear focus on growth and profitability.

In 2011-12, the JR McKenzie Trust received \$3.6 million in dividends from Rangatira.

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

### Jayar Charitable Trust

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

Since its inception in 1998 Jayar has contributed \$2.2 million. Peter McKenzie played a major role in the establishment of the Jayar Charitable Trust and served as its chair for many years. Before his death this year, Peter set out his vision for the future of Jayar and we are currently working to bring his ideas to fruition.



*Lady Shirley McKenzie and Sir Roy McKenzie*

# Finances — Ngā Pūtea

## Financial year ending 31 March 2013

While the financial year is not over, the grants budget has been almost fully spent or committed.

New grants/commitments made	23
For \$50,000 or more	12
For less than \$50,000	11
Largest	\$300,000
Smallest	\$500
“Success rate” (% of applicants to be offered a grant)	5%

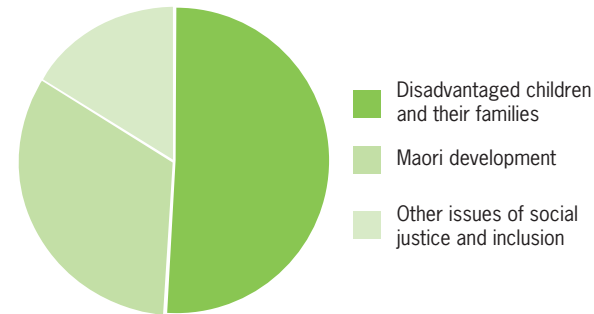
## Financial year ending 31 March 2012

	2011-12	previous year
Grant payments this year	\$2,639,302	\$1,950,807
Other spending on community support	\$202,574	\$121,042
Operating costs including salaries	\$513,731	\$509,077
Total Trust Funds	\$57,362,023	\$58,589,270

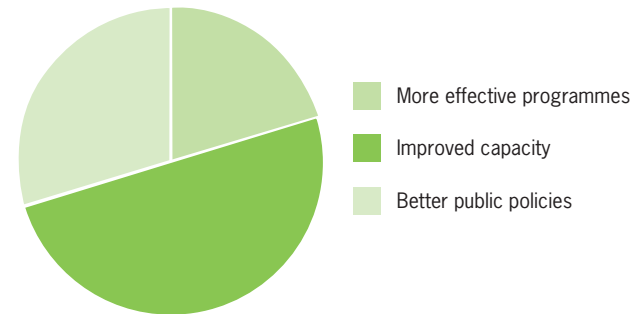
A full set of audited accounts is available from the office.

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

## The work of supported organisations aligns with these focuses (in the Trust’s strategy)



## New grants will hopefully contribute to these results



**J R MCKENZIE TRUST**  
ESTABLISHED IN 1940



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

