



J R MCKENZIE TRUST
ESTABLISHED IN 1940

265,000 **KIWI KIDS**
LIVE IN POVERTY → **THAT'S 1 IN 4**
CHILDREN

.....

LEVEL OF POVERTY **14%** → **LEVEL OF POVERTY**
IN 1982 WAS **TODAY IS** **25%**

ANNUAL REPORT
Pūrongo Pūtea a Tau

2013



J R McKenzie (1876–1955) and Lady McKenzie

For more information...

Kia whai māramatanga anō ...

- About applying for a grant
- Audited accounts 2012–13
- Rangatira Limited Annual Report

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Cover: The proportion of Kiwi kids living in poverty has almost doubled over the last three decades, see Child Poverty Monitor, page 6.



Welcome — Nau mai

J R MCKENZIE TRUST

ESTABLISHED IN 1940

Engā 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 ka toko i te tika me te pono hei korowai mo 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, back row: Sam Caldwell (Grants and Programme Advisor), Joan Smith (Wellington), Alison Glen (Trust Administrator), Chris McKenzie (Christchurch), Lyn Holmes (Christchurch), Jonathan Usher (incoming Dunedin), Puawai Wereta (Taupō), Marama Takao (Kaitohutohu), Charles Wilson (Auckland), Neville Caird (outgoing Dunedin). Front row: Iain Hines (Executive Director), Che Wilson (Ohakune), Patrick Cummings (Chair, Hamilton), Manaia King (Auckland), Eric Keys (Auckland). Inset: David Vance (Wellington), Liz Tanielu (Wellington), Julia Carr (Wellington).



Chair's report 2013 — Pūrongo a te Tumuaki 2013



Last year we lost over 46 years of institutional knowledge with the rotational retirement of our four longest serving Board members. This year the four new Board members have been enthusiastically learning about the Trust and contributing to its work.

This has not slowed our busy schedule of activities.

2013 is year 4 of our 5-year planning cycle. We've decided that the major review next year will focus on two things: firstly the overall impact of what we do with our resources, and how that can be improved. Hopefully the evaluation framework which we have developed over recent years will help. The second focus will be the processes we use in order to make that impact. These were substantially changed in 2010, and while they have been often tweaked since then it's time for a larger review, including seeking formal feedback from grant applicants.

The Trust's vision of 'a socially just and inclusive Aotearoa New Zealand' will remain for the next 5 years, as will our primary focuses on disadvantaged children and their families, and Māori development.

The majority of the Trust's resources still goes to grants made in response to applications from community

organisations. A few new grants are started each year; we look for proposals where funding and support from the Trust is likely to make an important difference. We try to establish positive, supportive, but not over-intrusive relationships with these organisations; and look for opportunities to add value to their work.

A minority of the Trust's funding, but many hours of effort, go into what we call 'proactive' programmes.

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. Meanwhile it also continues to refine the Trust's processes so that they are better suited to supporting Māori development.

The Connecting Education and Communities programme supports better educational outcomes for disadvantaged children, through increasing parents' and families' involvement in their children's learning. There is strong evidence that family involvement can make a substantial difference. We support a small number of initiatives around the country, through funding, mentoring and connecting them to one another. In collaboration with others, we are implementing plans to support this field of endeavour more broadly, through sharing tips and stories, and linking folk.

Thanks to the foresight of Peter McKenzie, the Trust is fortunate to have an opportunity to make a long-term difference in a specific area, through spending down the assets of the Jayar Charitable Trust over a period of up to 20 years. It is rare that we are able to think and act with this time

frame in mind! We are carefully planning to make the most of this 'investment'.

This year we began a partnership with the NZ Child and Youth Epidemiology Service at Otago University, and the Office of the Children's Commissioner. Together we will publish an annual snapshot of the state of child poverty in Aotearoa New Zealand. We believe it will be easier for society to work together to lift children out of poverty if we know how we are doing.

I want to acknowledge and thank the people who make the Trust's work possible. Volunteers are vital to the Trust's work – Board and Committee members, others (including Rotarians) throughout the country who contribute to our work, and beyond them many others who give freely of their advice. Our investors at Rangatira and Jayar are also crucial. Iain and his small team of staff are crucial to the Trust – they are the glue – thank you staff.

This year we are sad to lose the presence at the Board table of Neville Caird. In his 10 years Neville has been extremely positive, thoughtful and hardworking. We hope he will stay involved with the Trust, and also welcome his successor Jonathan Usher.

My first year as Chair has been rewarding. As one of the current stewards of the McKenzie legacy of generosity, I know we all do our best to maintain the excellent standards of our predecessors. We look to the past for our values, and to the present and future for where we can contribute.

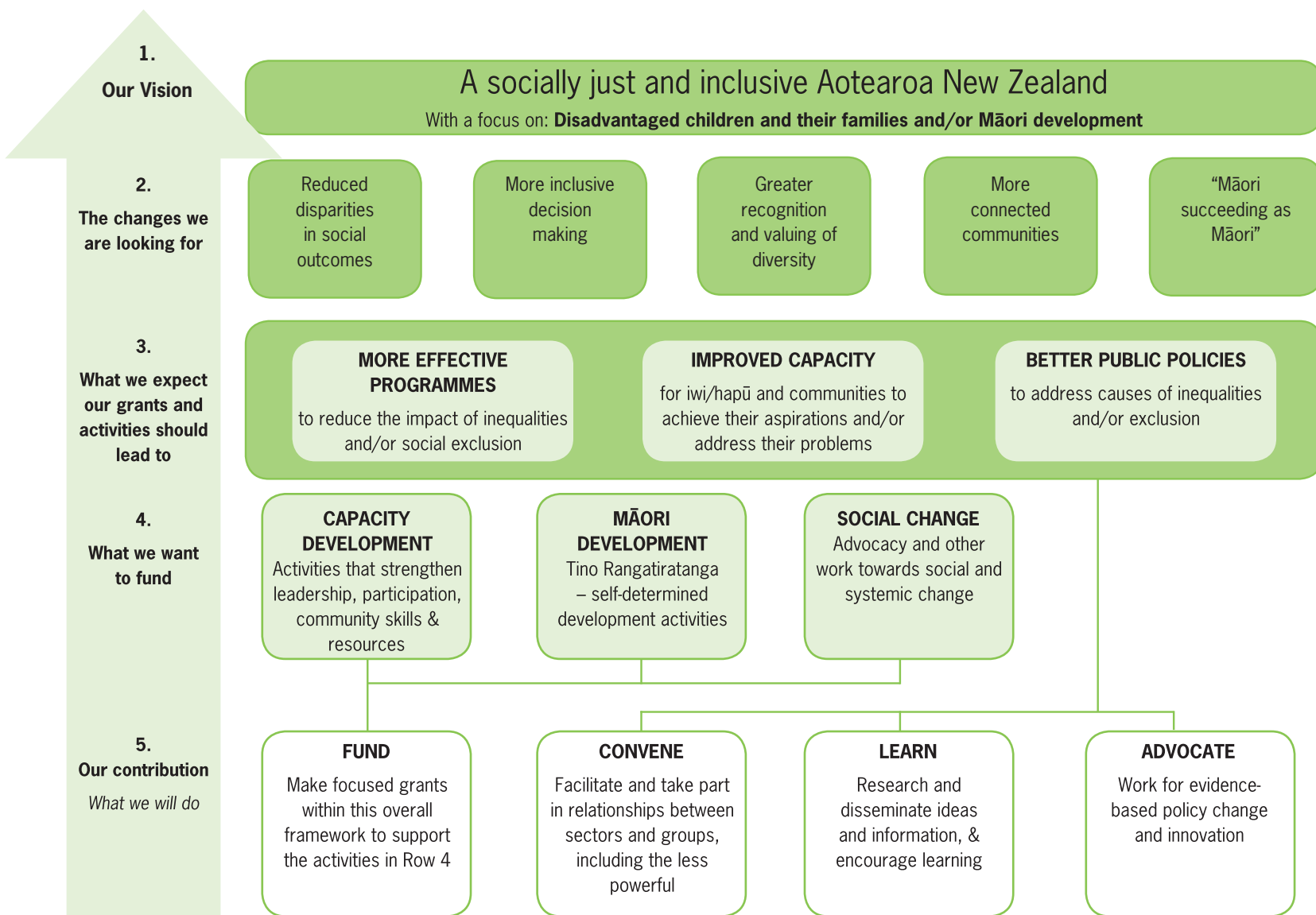
Patrick Cummings, Chair

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.

We have recently begun the review process which will determine our next five-year plan, considering our processes and the impact of all our work. However, we expect our vision and this strategy to remain largely the same for our next five-year plan.



Child Poverty Monitor

2 65,000 New Zealand children are growing up in income poverty. That's 1 in 4 Kiwi kids!

1 in 6 children have to go without the basic things they need, like fresh fruit and veges, a warm home, or trips to the doctor. 1 in 10 children are growing up at the hardest end of poverty: they're going without the things they need and their low family income means they don't have any opportunity to change this. 3 out of 5 of the children living in poverty are likely to be stuck this way for many years.

Over recent years a wide variety of reports and campaigns have drawn attention to child poverty in New Zealand; but until recently there was no accepted measure of just how bad the problem is, or whether it's getting better or worse.

When we take on any big challenge it is important to know what progress we are making. Monitoring lets us know the scale of the problem. It lets us know whether our actions are making any difference. It motivates us to keep on working.

Every year the Police tell us how many people have been killed on our roads. Happily, the number has decreased a lot, which shows that the range of approaches taken has been successful. But each year the number, and the Police, remind us that even a smaller number of deaths is unacceptable; there is more that we must do.

In December 2012, the Children's Commissioner's Expert Advisory Group recommended that the Government set targets to reduce child poverty, and measure progress towards them. How else, it argued, will we know whether or not the situation is improving?



With our long-term focus on disadvantaged children and their families, the J R McKenzie Trust approached the Children's Commissioner, and together we developed a plan to produce an annual **Child Poverty Monitor**. Drawing on the best available research, from the Child and Youth Epidemiology Service at the University of Otago, the Monitor captures the complexity of child poverty in four clear measures and tries to present them in an accessible way.

We hope that by reporting these same four measures year by year, we'll be able to show whether our efforts

as a nation are succeeding in reducing child poverty. We'll be able to tell whether we're making progress. We'll encourage people across New Zealand to discuss and understand this problem, and to think about how we can solve it.

This is a crucial matter for our country, our children and our future – a matter of national priority. We need to keep child poverty on the radar, and we need to know how we are doing. When we see child poverty rates falling at the same rate as road deaths have done over recent decades, we will deserve to feel proud as a country. And there will still be more to do.

www.childpoverty.co.nz

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Poutiria te Aroha

Poutiria te Aroha is a parenting programme being developed by **Te Mauri Tau**, anchored in Te Ao Māori and drawing on the philosophy and practice of nonviolence.

The programme name came from the late Dame Kāterina Te Heikōkō Mataira, who summarised the kaupapa as “Poupoua, tiritiria te aroha ki roto ki te whānau” – the practice of implanting and firmly embedding aroha (unconditional love) within whānau. Cultural mātauranga and tikanga (wisdom and practice) direct us to honour and respect the intrinsic mana and tapu (dignity, autonomy and sacredness) of children, and to parent from an awareness of that binding connection. Affirming the relevance of these tikanga gives Māori whānau the choice to parent in a way that upholds their identity and supports their tamariki and mokopuna (children and grandchildren) to develop to their full potential.

Te Mauri Tau uses a community change model which embraces everybody who interacts with children and families. To respond to Māori community needs they have held introductory Poutiria te Aroha programmes at the marae – with an open invitation to the whole community. They have also run parenting support groups, focus topics (e.g. Understanding Anger, Raising Boys, Raising Girls, Teenagers, Brain Development), monthly men’s group hui and intensive weekends, professional mentoring support for kura and kōhanga staff and whānau, presentations and discussions with educators and health and childcare practitioners. They have a Māori language class based on this philosophy called ‘Te Reo o te Ngākau’, and are writing waiata, karakia, posters and booklets as resources for parents to use at home.



Through all of this work, the community has learned that a child’s brain develops through connected communication, and that the language of feelings and needs is a way to practice unconditional love/aroha. Parents understand their children developmentally and have strategies to keep the relationship strong – especially when it is hard. The programme helps parents feel less isolated, builds their resilience and encourages them to practise self-care and to reach out for support in times of need. Through this practice, they acknowledge that their parenting contributes to something far greater and more enduring than

themselves: the indelible tāmoko (markings) upon the whakapapa of future generations and our society’s wellness.

In 2014 a key focus will be to run a Parent Educator Training (Train the Trainer) course to build up the numbers of trained nonviolent parent educators across the country.

“Te Mauri Tau uses a community change model which embraces everybody who interacts with children and families.”

Changing the way we think about crime and punishment

The Robson Hanan Trust is in the business of spreading new ideas and ways to reduce crime and social harm.

“We want to encourage the public, parliamentarians, and the media, to consider what the research tells us about ‘what works’ to reduce crime, and support those strategies, policies and programmes that make a difference,” says Kim Workman, founder and strategic adviser.

The Trust has seen some significant changes in its relationships with key stakeholders over the last year. “The media are increasingly comfortable about seeking the Trust’s advice on the ‘best person to talk to’ on a criminal justice topic. Our relationship is changing to that of referral service and policy adviser, as well as media commentator. This year alone, we have worked with three documentary film makers, providing research services, network contacts, and as a consultant on crime and justice issues.”

Parliamentarians are also more likely to test out ideas with the Trust, before developing a policy position. “We provide advice on an apolitical basis, and that information often finds its way into the debating chambers, and can influence government policy.”

The growing recognition that the Robson Hanan Trust is a source of evidenced-based criminal justice research has resulted in an increase in both undergraduates and postgraduate students making use of its resources, and offering to work with them either as volunteers or interns. It has also led to the establishment of Te Pātaka, a publicly accessible database which presently hold around 11,000 research items. The database is growing steadily, both in size and range. Already, media, politicians and policy advisers are finding Te Pātaka to be a valuable ‘first port of call’ on topical issues.

The Trust’s youth-oriented branch, JustSpeak, has gone from strength to strength this year, with a working group of around 80 dedicated young people. JustSpeak has core groups in both Wellington and Auckland and has hosted forums monthly in both centres attracting turnouts of around 100 people per event.

“We also strive to ensure that the basic rights and protections afforded by the modern state are not carelessly disregarded,” said Kim. “We are concerned about the growth of police powers, the unnecessary expansion of criminal justice legislation, and a growing



A JustSpeak camp

tendency to bypass criminal justice protections and democratic processes. We actively defend the democratic traditions within the criminal justice system.”

www.rethinking.org.nz



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Grassroots Community Leadership

The Merivale Community Centre is carrying out a community survey to identify local community leaders. The following is an example of two Mana Wahine, women within in the Merivale community who are wonderful examples of that leadership.

Deb McArthy has set up and runs the Merivale Community Garden which has been functioning now for 18 months. She is also a well-known face within the community and her welcoming nature helps strengthen community connectedness.

"I am very passionate about the Merivale community and I really love it," says Deb. "I believe we all need to learn how to garden to feed ourselves to get through."

"It's more than just free food – it's teaching ourselves how to come together as a community. I'm hoping that this will bring people, as in the old days when I was young and the generation before. I love my community... it's a passion.

"The fact that this garden is never tagged, never stolen from, never vandalised, I think that speaks volumes, I think that says it all."

The garden that has been created has become a sanctuary for the people that go there, creating a space for healing on various levels. Deb is very supportive of all people who go to the garden.

"I have young people that have been in trouble, too young for the court system, and I think I've had a few successes. I enjoy having the younger ones about.

"People like it here. It's a nice place to be."

Lana Taupo set up and co-runs monthly community meetings. These meetings are open for the entire

community to attend. The main purpose of the community meetings is to keep the children of Merivale safe. However it is also an opportunity for the community to air any issues and to keep the lines of communication open in regards to community issues.

When asked why she takes a leading role in the community, Lana replies "Communication, connection, caring. It's about our kids really, and about our kaumātua and our kuia: keeping them safe. It all started with the safety of our kids."

"What I've tried to do is to help the whānau to become a whānau: where we are all on the same wavelength, where we want to help and just work together.

"I've had to go to our whānau members and ask them to step up, to take over where we needed to take care of our own... and this is the good thing about our whānau: they've heard the call and stepped up to the plate."

The community meetings also provide an opportunity for residents to support each other and for residents to take charge of their own communities.

"You've got to get to know the people in the community to love them for who they are," explains Lana. "It's about learning other peoples' cultures and respecting it. It's about trying to live with one another and keep one another safe if we can."

The community works closely with the Police, Tauranga City Council, Housing NZ, the local primary school, Kōhanga and early childhood education centre. Lana is also very active at community events where she will help prepare food and lead the cleaning up afterwards, and always makes sure the children of the community get their needs met.

"If we're going to make this work," says Lana, "we need to work together: whether it be with the community, the community centre, our local school, the kōhanga reo, our kindergarten, the local police, the city council, it doesn't matter: you need to work together."

www.merivale.org.nz



Refugee women developing social enterprises

Former refugee women in Auckland are being supported to develop their knowledge, skills and talents to improve their social well-being and the economic well-being of their families.

This is thanks to the WISE Collective, a community initiative funded for three years by the J R McKenzie Trust. This is a partnership project between the **Auckland Regional Migrant Services Trust (ARMS)** and the Auckland Refugee Community Coalition.

Over 100 women are now connected to the WISE Project, receiving training, knowledge, social support and resources to help them adjust to a new society and ultimately the opportunity to generate an income with their skills.

Under the project, WISE hubs are running weekly in Henderson, Massey and Avondale, regularly attended by over 30 women. Several women are selling ethnic food at the New Lynn Ethnic Night Market and community events. Most recently 35 women attended a Food Handling Certificate course, and another ten participated in a workshop to enhance their financial literacy related to catering activity.

This truly multicultural project seeks to open up a wide range of socially empowering and income-generating pathways for these resourceful and enterprising former refugee women who have made Auckland their new home. The WISE Collective Project is run by a team of women who hail originally from Rwanda, Ethiopia, Burma and New Zealand, and altogether the WISE Project participants come from 16 different countries of origin.

www.arms-mrc.org.nz



(clockwise from top left) Women from the WISE Collective during the driving classes, New Lynn night market, food handling certificate course and at their first group meeting.

“This truly multicultural project seeks to open up a wide range of socially empowering and income-generating pathways for these resourceful and enterprising former refugee women who have made Auckland their new home.”

Beyond the Vision: An Enterprising Journey

Ngā Hononga Marae Charitable Trust (NHMT) continues to develop social enterprise to address Māori disparity within their local communities along the Whanganui River.

NHMT has developed an enterprise producing compost (using greenwaste, paunch and leaves), growing white button mushrooms and supplying produce such as fresh vegetables. Other business opportunities are being negotiated for further economic development and employment creation to make a difference at a flaxroots level.

The decision to become business managers and owners enabled NHMT to take on the role and responsibility of an employer and to actually be in a position to offer work to those of their people who were 'unemployed and considered unemployable'.

Training and learning 'in-the-job' helps build both professional skills (such as plant and machinery operations, product growing, harvesting and supply, and customer service) and personal skills (such as self-confidence, sense-of-purpose and contribution) within a supportive and understanding work environment with clear and high expectations.

There is learning still ahead for management, particularly in regards to balancing natural communal spirit and community conscience with the stark reality of business acumen and commercial sustainability.

The challenge for NHMT and similar social enterprises is to grow their capability and capacity to become self-managing, self-sufficient and self-reliant across their respective ventures through consistency of high quality production.

NHMT has forged relationships with others who are committed to their vision, goals and aspirations, who have contributed in many forms to their implementation plan to effect real change from within the whānau unit.

NHMT is a vehicle and catalyst to making a difference for those ready and motivated to return to the workforce. The regularity of a take-home pay packet beyond the welfare benefit provides a small yet vital beginning point for shifts in family relationships and behavioural patterns.

"No one said it would be easy," says manager Nihi Houia. "There have been many bumps and grinds along the way and more importantly there have been awesome moments of satisfaction and rewards (both intrinsic and extrinsic) for all involved."



NHMT's has been an 'enterprising journey': creating social change on their doorstep for those willing to take the first step to self-learning and whānau-improvement, wrapped in a support cloak of 'faith, hope and love'.

Grant funding has allowed them to travel 'beyond the vision', establishing enterprises and building a sure foundation which other funders are now willing to invest in.

www.nhmt.org.nz



Encouraging discussion of Inequality, a New Zealand crisis

Inequality has risen rapidly in New Zealand in recent years. Many have watched with concern the widening gaps between rich and poor. The figures underline a grim picture: the percentage of children in poverty, the disproportionate numbers of Māori and Pasifika people in lower income groups, the impact of high imprisonment rates on particular communities, the consequences of inequality in education.

Inequality: A New Zealand Crisis was published in June 2013 by **Bridget Williams Books**, edited by Max Rashbrooke with chapters by specialists such as Jonathan Boston, Kim Workman, Tracey McIntosh, Philippa Howden-Chapman and Linda Tuhiwai Smith. This project has been driven by the urgency people feel about the issue. Leading scholars came together willingly to advise, to write; information was carefully researched, checked, reviewed; stories were gathered, text was written and edited. The purpose was to provide New Zealanders with accessible, reliable information on this significant issue.

Support from the J R McKenzie Trust enabled discussion around the country. First, international contributor Professor Robert Wade gave public lectures in the main centres, also meeting politicians, unionists, and other economists. His visit prompted strong media interest and a short video on inequality ('Robert Wade with Max Rashbrooke' via www.bwb.co.nz).

Then Max Rashbrooke set off to talk about inequality at regional events. Booksellers have commented on the wide range of people attending: younger readers; local

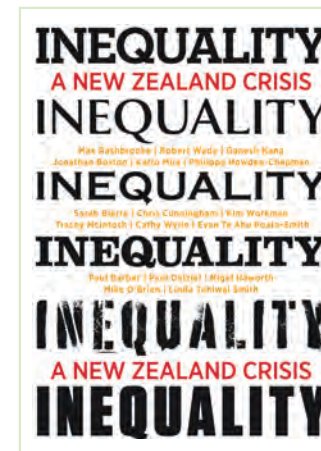
government officials and politicians; church groups and civic leaders. Local networks have started up, or grown. Max has travelled through the central North Island and top of the South; next year, he will go further afield.

Max has also been invited to speak to university classes; to staff at PriceWaterhouseCoopers; at the Film Archive; union conferences; at writers' festivals. People of all kinds (including many politicians) are asking about inequality – and what they can do about it.

This project has gathered momentum from the people concerned about this issue. Funding support from the New Zealand Council for Christian Social Services, the G Trust and the J R McKenzie Trust was invaluable in making a book 'more than a book' – and taking the question of rising inequality out into many parts of New Zealand society.

The 'inequality project' will continue in 2014. *Inequality: An Introduction*, drawn from the main text, will be published soon, cheaper and shorter, in print and e-book. Max plans to continue writing and talking about inequality.

www.inequality.org.nz



Learning from evaluation — Ko ō mātou akoranga i tēnei tau

We are interested in learning. Without a curiosity about how we could do better, it is easy – especially so in the privileged world of philanthropy – to slip into complacency: ‘being in a groove’ can turn into ‘being in a rut’. We want to learn and where possible improve: that is why we have an evaluation framework, fitting within a five-year review cycle. It’s why we include some form of evaluation in our projects and programmes.

It’s also why we ask the organisations we support to monitor, evaluate and reflect on their work. We hope that they too are curious, and open to changing how things are done where improvements are possible – while of course staying true to their principles and values. We contribute to the costs of this as part of our grant support.

Often they are well ahead of us! But we all know that contributing to long-term social change is terrifically complex, and that measuring and evaluating progress is equally complex. While we’re seldom likely to prove that our efforts have led to change, it is still worthwhile investigating what difference our work has made. It’s also useful to hear from the people and organisations we work with, to gather ideas about how our processes can improve.

It’s now a few years since the Trust took up its new approach. We are starting to see evidence that the evaluations undertaken by or for organisations have been helpful to them. Here are some examples:

- The New Zealand Ethnic Employment Education and Youth Development Charitable Trust has incorporated many of the ideas that came from several rounds of inquiries by its evaluators into its ‘catch-up classes’ for students from refugee backgrounds. As a result the classes are clearly even more effective than they were before.
- Te Rūnanga o Ngāi Tahu learned from an evaluation of its online financial literacy resource that it had been trying to reach too many target groups. As a result it focused more on one user group.
- Red Cross Refugee Services ran ‘before and after’ surveys of the communities in which its trial health education programme, using trained workers from within each community, was carried out. The project was also supported by an evaluation advisory group. As a result it has learned a lot about running such programmes, and has shown that this approach was very successful.
- Te Ara Tika o te Whānau Trust’s work within the Notorious Chapter of the Mongrel Mob was evaluated by someone who spent time engaging with the community. They found it very confirming

and useful to hear an understanding outsider’s description of what they have achieved, in spite of the major challenges they face.

- Te Ora Hou Aotearoa: Part of the evaluation focused on ‘Value for Money’ analysis based on a 2008 study by Infometrics which concluded that child abuse and neglect costs NZ around \$2 billion every year. If the Tiakina o Tātou Tamariki project leads to a 5% reduction in annual CYF notifications, the return on investment could be estimated at \$3 for every \$1 invested.
- Imagine Better commissioned a major mid-point evaluation of their Family Leadership Strategy, assisting disabled people and families to dream and plan for a good life. As a result they were both encouraged to continue their work at family and systemic levels, and challenged to develop more long-term strategies to be able to continue their work.

We are proud of what these groups are achieving. You can read more about some of them on our website.

“We want to learn and where possible improve: that is why we have an evaluation framework, fitting within a five-year review cycle.”

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



How to apply for a grant

The 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 2014 are 28 February and 11 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:

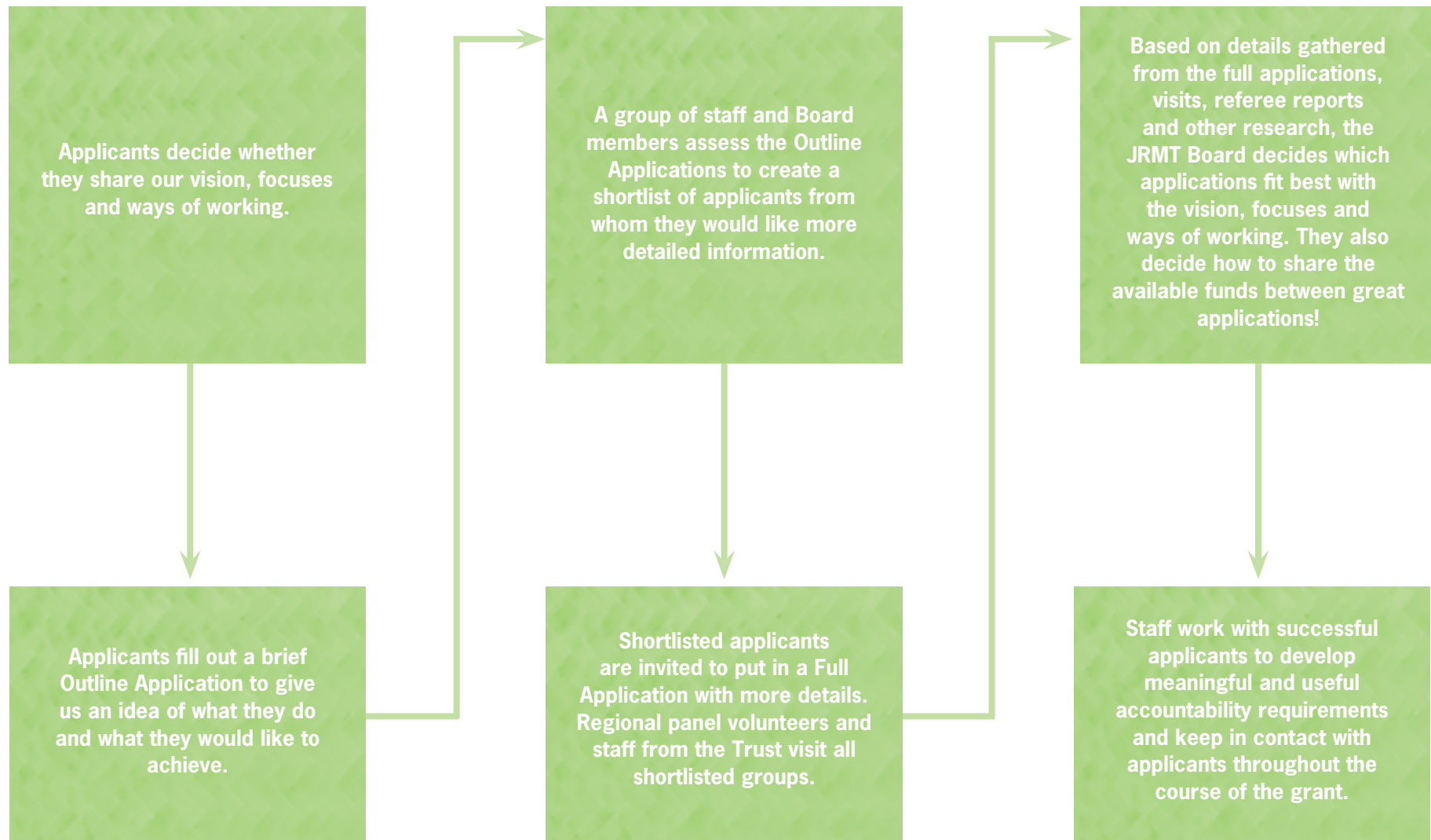
- **Capacity development** – Activities that strengthen leadership, participation and/or community skills and resources;
- **Māori development** – Tino rangitiratanga /self-determined development activities;
- **Social change** – Advocacy and other work towards social and systemic change.



Lady Shirley McKenzie and Sir Roy McKenzie

The closing dates for applications in 2014 are 28 February and 11 July.

How the process works



Organisations which we are currently supporting — Ko ngā takoha āwhina kua tukuna a

Dollars show the total amount committed to the organisation under our current funding agreement

Major grants from our regular grant rounds

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 3 of 5 \$100,000.00

AUCKLAND CITY MISSION, To contribute to the analysis and dissemination of Family 100, a 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, The facilitation of ARMS' social enterprise activities with refugee and migrant women, Year 2 of 3 \$264,284.00

CHILD POVERTY ACTION GROUP, Supporting CPAG's work to eliminate child poverty in New Zealand – salaries and associated costs for administration and research, Year 2 of 2 \$212,000.00

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 \$400,000.00

HE KOROWAI TRUST, To move whānau from substandard or state housing dependence to affordable home ownership on a site that is designated drug, alcohol and violence free, Year 1 of 2 \$131,528.00

IMAGINE BETTER, To advance the Youth Transition Strategy, for young people with disabilities Year 1 of 1 \$95,037.00

INTERSEX TRUST, To enable ITANZ to deliver training/ education programmes around Aotearoa, Year 3 of 3 \$270,000.00

LIVING WAGE AOTEAROA, To deliver leadership training so communities can engage with powerful decision-makers and transform lives of New Zealanders, Year 1 of 1 \$30,000.00

MERIVALE COMMUNITY, Community workers to identify street leaders, and work with them under our Puahou model to develop and implement a street plan, Year 2 of 2 \$88,244.00

NGĀ HONONGA MARAE, Towards community economic development in the middle region of the Whanganui River, Year 3 of 3 \$225,000.00

NGĀ KANOHI MARAE O WAIRARAPA, Rangatahi Tū, Rangatahi Ora: a marae based trades training to employment programme targeting Wairarapa Māori youth, Year 2 of 2 \$250,000.00

NGĀ TĀNGATA MICROFINANCE TRUST, Supporting Ngā Tāngata to extend its microfinance services and implement its advocacy role, Year 1 of 2 \$319,060.00

ROBSON HANAN TRUST, Rethinking Crime and Punishment – justice reform advocacy, Year 2 of 3 \$242,000.00

STREETS AHEAD 237, Towards programmes with young people in Porirua – salaries and office overheads, Year 3 of 3 \$375,000.00

TE AHIKAA ROA TRUST, To employ a manager to assist Māori whānau to build rammed earth papakainga in Te Taitokerau, Year 1 of 1 \$50,000.00

TE ARA TIKA O TE WHĀNAU, To employ a key worker to influence change in vulnerable families from social disadvantage to positive outcomes, Year 1 of 2 \$160,000.00

TE HUINGA SOCIAL SERVICES TRUST, To empower men to build confidence, raise self-esteem and restore pride, knowledge and mana and to nurture and care for self, whānau, hapū, iwi and community, Year 1 of 2 \$38,460.00

TE KĀHUI O TE RANGI, To hold a series of noho which will transform participants to a place of understanding and knowing who they are as Tāne, Year 1 of 2 \$160,000.00

TE KOROWAI AROHA O AOTEAROA, To build capacity of whānau, hapū, iwi to strengthen them through training advanced practice models for whānau practitioners, Year 1 of 3 \$215,248.00

TE MAURI TAU, To continue the development and expand the wider delivery of a non-violent parenting programme model, Year 2 of 3 \$300,023.00

TE RŌPŪ PAKIHI, 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. Projects to be undertaken are: 1) Ngāti Raukawa Ecosystem 2) He Ōranga Hapori 3) Te Ao Māori mai i Rangitikei ki Whitireia, Year 2 of 2 \$300,000.00

TE RŪNANGA Ā IWI O NGĀPUHI, Creating and delivering toolboxes for building Marae capacity and capability, Year 2 of 2 \$21,000.00

TE RŪNANGA O NGĀI TAHU, To create video and interactive games for Te Huringa financial literacy website, Year 1 of 1 \$100,000.00

THE NEW ZEALAND CHILD AND YOUTH EPIDEMIOLOGY SERVICE (NZCYES), To produce and disseminate the Children's Social Health Monitor, making available information related to disparities and inequalities in child and youth health, Year 2 of 3 \$96,131.00

THE NZ ETHNIC EMPLOYMENT EDUCATION & YOUTH DEVELOPMENT CHARITABLE TRUST, The educational catch up programme aims to improve the educational outcomes for participating refugee-background youth, Year 1 of 2 \$208,000.00

VICTORY COMMUNITY HEALTH, Keep Victory Safe community development project, Year 1 of 2 \$100,000.00

WESLEY COMMUNITY ACTION, To develop a long term sustainability plan for the Mana Wahine project working with 'hard to reach' whānau, primarily the Black Power community in Wellington, Year 1 of 1 \$86,000.00

WHAKATIPURANGA RIMA RAU, Identify, facilitate and fill 500 employment opportunities for Māori within the health and disability sector, Year 1 of 2 \$320,000.00

WHĀNAU ENTERPRISE DEVELOPMENT TRUST, To develop a small farm business on Māori land in Te Whaiti, Bay of Plenty, and establish a training centre for whānau/hapū around the country, Year 3 of 3 \$182,400.00

We also make a few smaller grants to projects which contribute to our strategy

ACHIEVE – THE NATIONAL POST-SECONDARY EDUCATION DISABILITY NETWORK, A contribution toward administrator wages for 2013, Year 1 of 1 \$3,000.00

EMERGE SUPPORTED EMPLOYMENT TRUST, Transition parenting circles, supporting parents of young people with disability, Year 3 of 3 \$15,000.00

KORORĀREKA MARAE SOCIETY A series of workshops to teach piupiu making as a potential business opportunity, Year 1 of 1 \$5,000.00

MANCHESTER HOUSE SOCIAL SERVICES SOCIETY, Provide a wrap around service for young families breaking the cycle of intergenerational social dependency, Year 3 of 4 \$20,000.00

PEOPLE FIRST NEW ZEALAND, NGĀ TĀNGATA TUATAHI, Donation for People First 10 Year's Anniversary Celebration, Year 1 of 1 \$2,500.00

PHILANTHROPY NEW ZEALAND, To run a half day workshop with Liz Weaver, Year 1 of 1 \$1,500.00

ROYAL NEW ZEALAND PLUNKET SOCIETY – LAKES AREA, Delivering a Parenting Education Programme drawing on Mana Ririki and Whakatipu, including evaluating this pilot and disseminating the findings, Year 1 of 1 \$200,000.00

TARANAKI EMPLOYMENT SUPPORT FOUNDATION, Training workshops for community organisations, Year 1 of 1 \$5,000.00

TE RŪNANGA O NGĀTI WHAKAUE KI MAKETŪ, To develop a Business Case for cultural tourism in Maketū, Year 1 of 1 \$5,500.00

TE WĀNANGA O RAUKAWA, To produce a resource of Ngāti Raukawa kaumātua interviews on mātauranga and kaitiakitanga, Year 2 of 2 \$20,000.00

Other current projects

J R MCKENZIE YOUTH EDUCATION FUND, The YEF makes small grants to individuals and families for children's educational costs; administered by Rotary, Annual grant \$192,000.00

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

OFFICE OF THE CHILDREN'S COMMISSIONER, To produce and disseminate the annual Child Poverty Monitor, Year 1 of 5 \$101,500.00

THE NEW ZEALAND CHILD AND YOUTH EPIDEMIOLOGY SERVICE, Data analysis and production of the Child Poverty Monitor Technical Report, Year 1 of 5 \$323,217.00

Connecting Education and Communities grants

HOROWHENUA PASIFIKA EDUCATION INITIATIVE, Engaging Tongan and Samoan families in early childhood education in Levin, Year 3 of 3 \$156,250.00

RAURIMU AVENUE SCHOOL, Using whānau ora concepts at a low-decile school in Whangarei, Year 1 of 2 \$28,000.00

TE HUARAHI PROJECT, Seeking to improve Māori educational outcomes in Pukekohe, Year 3 of 4 \$200,000.00

WAITAKERE IMPROVING SCHOOL ATTENDANCE PROGRAMME, Upskilling field workers to encourage low/no-cost learning for families in Waitakere, Year 1 of 2 \$100,000.00

Pūtea Toro grants

BLUE BACH PRODUCTIONS, Māoriland Film Festival – the first international indigenous Film festival in NZ – Ōtaki 2014, Year 1 of 1 \$20,000.00

FAMILY PLANNING, To support 5 Māori health workers from Māori health providers delivering sexual and reproductive health services to attend the Family Planning Conference, Year 1 of 1 \$5,000.00

ICEHOUSE, To develop, test and run a tailored Capacity Development and Leadership programme with iwi in the Nelson and Northland regions, Year 1 of 1 \$19,000.00

PHILANTHROPY NEW ZEALAND, To convene a 2-day noho marae wānanga for 'Te Huihuinga-ā-iwi'; to establish and implement a Kāumatua role; and to support Māori Advisory Committee meetings, Year 1 of 1 \$7,500.00

Deaf Development Fund \$82,500

THE DEAF DEVELOPMENT FUND enables capacity building in the Deaf community by supporting individuals to undertake study and personal development, and by funding Deaf-led initiatives that enhance skills, leadership, new knowledge and cultural resources of the New Zealand Sign Language (NZSL) community.

1. 11 Deaf Studies Awards – support for Deaf individuals to undertake NZSL teacher training at Victoria University
2. Deaf Parents conference – promoting parenting skills among Deaf parents and peer support for children of Deaf parents
3. Sir Roy McKenzie VUW scholarships – enabling two Deaf students to complete Bachelors degrees at Victoria University
4. Three athletes to compete in the Deaflympics in Bulgaria, July 2013
5. Awards for four Deaf people to attend the National Māori Deaf Hui in Te Kuiti, June 2013
6. Interpreter costs for an accessible performance of "Tribes" at Circa Theatre
7. Diversity Works – for creation of a digital archive of historical NZSL and Deaf community film footage, "Sign DNA"
8. Deaf View 3 – a conference attended by 200 Deaf community members, professionals, internationals – hosted in Wellington
9. World Federation of the Deaf conference, Sydney – support for a NZ delegate to present on NZSL language policy.



Where does the money come from?

Rangatira Limited

Rangatira 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 J R 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 2012-13, the J R McKenzie Trust received \$3.6 million in dividends from Rangatira.

For further information about Rangatira, see: www.rangatira.co.nz

Jayar Charitable Trust

The 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 last year, Peter set out his vision for the future and proposed a new direction for Jayar. On this basis the Jayar Charitable Trust and the J R McKenzie Trust have jointly agreed to spend Jayar's capital and income over approximately 20 years. The funds are to be invested in a specific programme or area of focus with appropriate evaluation, to achieve visible, measurable positive social change. This work has been named the Peter McKenzie Project in memory of Peter's vision:



“This scale of investment in a single project or area could have a really significant impact, generating a much greater ‘social return on investment’ than could be achieved by continuing the present strategy.” – Peter McKenzie

A working group has been formed to guide the project and a developmental evaluation has begun. After an extensive process of scoping and research, it has been determined that the Peter McKenzie Project will focus on addressing the issue of child poverty in New Zealand. Over the coming months we will continue the exciting process of determining the specific focus and approach to be taken.

Finances — Ngā Pūtea

Financial year ending 31 March 2014

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

	2013–14	previous year
New grants/commitments made	28	23
For \$50,000 or more	16	12
For less than \$50,000	12	11
New multi-year grants	12	11
Largest	\$402,600	\$300,000
Smallest	\$1,500	\$500
“Success rate” (% of applicants to be offered a grant)	7%	5%

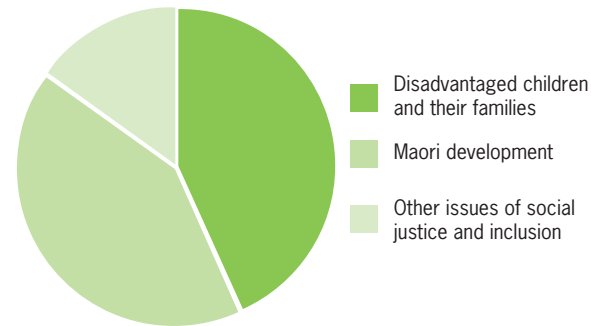
Financial year ending 31 March 2013

	2012–13	previous year
Grant payments this year	2,588,064	2,701,904
Other spending on community support	220,947	202,574
Operating costs including salaries	727,977	677,414
Total Trust Funds	85,017,416	68,489,779

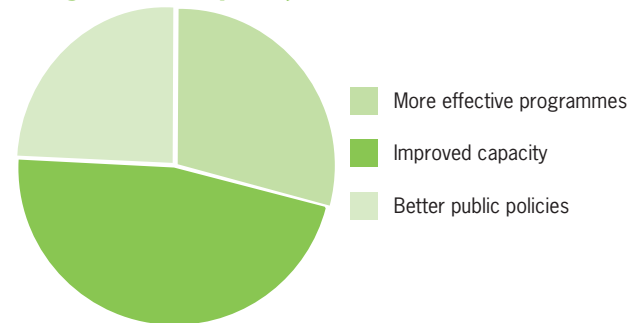
A full set of audited accounts is available from the office.

“... 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.*

