



J R MCKENZIE TRUST
ESTABLISHED IN 1940



ANNUAL REPORT
Pūrongo Pūtea a Tau

2014



J R McKenzie (1876–1955) and Lady McKenzie

For more information...

Kia whai māramatanga anō ...

- About applying for a grant
- Audited accounts 2013–14
- Rangatira Limited Annual Report

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This report was produced by Central Media, Wellington; with graphics by Te Tahī Takao, Ōtaki; and printed by Graphic Press and Packaging, Levin.

Cover: Some of the more than 1,000 people taking part in the 'Take steps for child poverty' march, organised by Child Poverty Action Group in September 2014 (see page 15).



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 mō 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 kūmara will produce a harvest”.



TRUSTEES AND STAFF, from 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), Puāwai Wereta (Taupō), Marama Takao (Kaitohutohu), Charles Wilson (Auckland), Neville Caird (finishing term, Dunedin). Front row: Iain Hines (Executive Director), Che Wilson (outgoing, Ōhakune), Patrick Cummings (Chair, Hamilton), Manaia King (Auckland), Eric Keys (Auckland). Inset: David Vance (Wellington), Liz Tanielu (Wellington), Paula Thérèse King (Wellington).



Chair's report 2014 — Pūrongo a te Tumuaki 2014



In the course of the Trust's 74th year, we have sadly farewelled two valuable Trustees, Julia Carr and Che Wilson. We will miss their wise contributions. In Julia's place we welcome Paula King, whose contribution is already apparent.

In a highlight this year, the Trust was humbled to receive the 2014 Award from the International Funders for Indigenous Peoples organisation, which acknowledges successful approaches to the funding of indigenous communities. This is the first time the IFIP Award has been given to a New Zealand organisation.

2014 was the review year in our 5-year planning cycle. We focused on two things: how to maximise the overall impact of what we do with our resources, and the processes we use in order to make that impact. Hopefully this review, which included substantial input from grant applicants, will improve the Trust's effectiveness.

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. 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 **Connecting Education and Communities** programme seeks to enhance the long term opportunities for disadvantaged children, through increasing their parents' and families' involvement. There is strong evidence that family involvement in their children's learning can make a substantial difference to their academic success.

The **Te Kāwai Toro Committee** continues to lead the Trust's involvement in Māori development. This year it published the first economic study of philanthropy's overall contribution to Māori; it indicates what we expected – that there is an opportunity for this contribution to be larger, more coordinated and more effective.

The Trust has long been concerned by the number of New Zealand children who are disadvantaged by poverty, and has continued its involvement in the Child Poverty Monitor. It is absurd that in a relatively wealthy country with a tradition of fairness, one in four children live in households below the internationally recognised poverty line.

This year the Trust endorsed the Living Wage, a tool to 'enable workers to live with dignity and to participate as active citizens in society.'

I want to thank the people who make the Trust's work possible. The groups that we support give us back so much, in advice and perspective but above all in inspiration. Volunteers are vital too – Board and Committee members, others (including Rotarians) throughout the country, and

beyond them many others who give freely of their advice. Our investors at Rangatira and Jayar are also crucial. Thank you to the small staff team; in particular I'd like to acknowledge the outstanding contribution made by Sam Caldwell in the last three years. Best wishes for your return home Sam.

As one of the current stewards of the McKenzie legacy of generosity, 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 new colleague — Tō mātou hoamahi hou

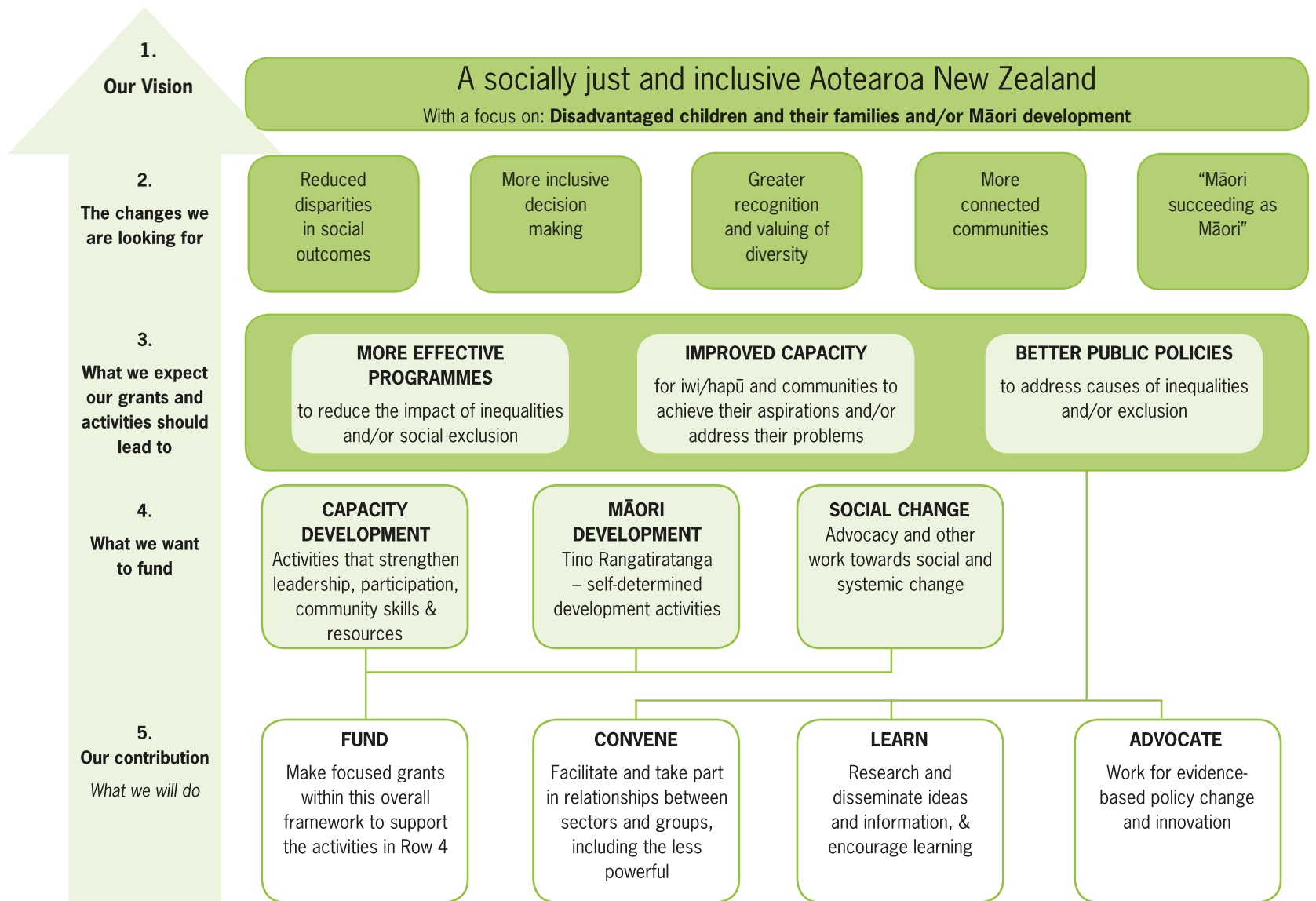
While we've lost the wonderful Sam Caldwell, we are delighted to welcome Eileen Kelly as the new Grants and Programmes Advisor. Eileen has experience in many community organisations, and in several countries. Her past roles include advocacy, community development, training, fund raising, grant making, management, partnership development, communications ... gosh! Eileen has strong commitments to social justice and human rights. We are looking forward to the energy, experience and fresh perspective that Eileen brings.



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 are currently undertaking the review process which will determine our next five-year plan, considering our processes and the impact of all our work. However, our vision and this strategy will remain largely the same for our next five-year plan.



Speaking for ourselves

What stops families moving out of poverty? There is little in-depth knowledge of what traps some families in a cycle of poverty while others move forward to more secure lives.

The **Auckland City Mission's Family 100 Research Project** followed 100 families living in severe hardship over the course of a year, in order to understand what factors prevent people moving out of poverty. The study was led by the Mission in collaboration with researchers from Waikato University, Massey University and the University of Auckland. The Mission wanted the voices of the real experts on poverty in New Zealand, those who live it each day, to be heard. This would help identify better ways to meet their needs.

100 families were interviewed every two weeks for a year. Participating families had used the Mission's foodbanks over a significant period of time and represented the diversity of users of this service. The Mission wanted to reveal the private rather than public story of these families. The public story is told repeatedly by families to social services, as they navigate a vastly complex landscape to get help from agencies. The private story, the reality of living in Auckland on a very low income, is rarely heard. The study revealed a picture of creativity and incredible resilience, as well as intense hardship.

The Mission released two major documents in 2014 that communicate the Project findings. *Speaking for Ourselves* — the truth about what keeps people in poverty from those who live it, tells the stories of the 100 families. It outlines the reality of living in poverty and shares the families' ideas on what changes would assist to free them from poverty.

Demonstrating the Complexities of Being Poor is a communication tool co-developed by the Auckland City Mission, Auckland Council and Thinkplace. It walks the reader through the poverty experience by following 'Charlotte' as she seeks to get some of her family's basic needs met, and in doing so challenges assumptions regarding people living in poverty and highlights opportunities for change.

"The public story is told repeatedly by families to social services, as they navigate a vastly complex landscape to get help from agencies. The private story, the reality of living in Auckland on a very low income, is rarely heard."



Our Vision — Our Whānau — Our Future

He Korowai Trust is working to develop Tino Rangatiratanga by moving families from substandard or state housing dependence to housing independence, through project “Whare Ora”, an affordable social home ownership model being developed by the Trust.

The Trust purchased a 50 acre site in Kaitaia where it has established a papakainga settlement.

Nineteen families met the project criteria: having been refused state housing they were living in either a cowshed, lean-to, bus or condemned house, and were happy to comply with the policy of no alcohol, drugs or violence within the site.

A series of workshops were held over 4 months covering topics including: papakainga living; the benefits of living in a drug, alcohol and violence free community, and dealing with non-compliance; dispute resolution ideas; the difference between owning and renting; what home ownership means to you; how home ownership should improve your quality of life; what type of housing features you want or need; Māori land; the Māori Community Development Act 1962; and finally, goal setting and finance options.

Eleven families successfully graduated and will achieve their dream of affordable home ownership.

“He kokona whare e kitea, he kokona ngākau e kore e kitea

*The corners of a house are easy to see
the corners of a person’s heart are not
so easy to see”*



ABOVE: A substandard whānau home. BELOW: 4 of the 9 homes on site.



A boutique to bring safety to women and children

The J R McKenzie Trust has supported **Women's Refuge** through seed funding for a chain of high end recycled clothing boutiques called **Yellow Belle**. This year **Women's Refuge** opened its flagship store in Takapuna and a second store in George Street, Palmerston North.

At the heart of Yellow Belle are the women and children experiencing domestic violence. Profits from these charity shops are put into local refuges, used to open more stores and eventually to fund the important groundwork of Women's Refuge. These boutiques have been created to ensure that Women's Refuge is able to continue its work to make a safer and better future for New Zealand.

"It is a dream of mine to create sustainable income through a business and our research showed us that high quality recycle boutiques would be a great investment," says Women's Refuge Chief Executive Heather Henare. Already both shops are meeting or exceeding expectations and sales targets due to the goodwill of shoppers and those who donate their clothes.

"Yellow Belle provides a wonderful opportunity for people to get involved, be generous and really make a difference through donating, volunteering and other support."

"Many businesses, including The Warehouse, Hesketh Henry and TV3, have put our large corporate drop boxes in their staff rooms. They come back filled to the brim with fantastic clothes," says Yellow Belle Project Manager Stephanie Garvey.

The opening of the Yellow Belle boutique was attended by the new Yellow Belle Patron Dame Rosemary Horton. Yellow Belle is full of labels ranging from Trelise Cooper to WORLD. The attractive store brand and design as well as a slick retail

website was designed by Saatchi and Saatchi as part of their on-going relationship with Women's Refuge.

"We wanted to create a point of difference for our stores," says Ms Henare. "We wanted shopping to be a special experience for the women who shop at Yellow Belle." "Future plans include opening more stores, nurturing women into employment opportunities by gaining work experience in the stores and continuing to engage with clothing designers and businesses. The Yellow Belle team is inspired and dedicated to helping women and children."



At the Palmerston North Yellow Belle opening, from left: Heather Henare, Women's Refuge Chief Exec.; Stephanie Garvey, project manager; Dame Rosie Horton, Yellow Belle Patroness; and Ang Jury, Palmerston North Women's Refuge Retail Manager.



Above: The Yellow Belle flagship store at Takapuna.

At the heart of Yellow Belle are the women and children experiencing domestic violence. Profits from these charity shops are put into local refuges, used to open more stores and eventually to fund the important groundwork of Women's Refuge.



Future focused learning in connected communities

The overarching purpose of **Te Mana O Kupe** and **Te Reanga Ipurangi Ōtaki** Education Trusts is to lift student educational achievement in 13 low decile schools in Porirua East and six low decile schools in Ōtaki, including three kura. The project is modelled on that of the **Manaiakalani Trust** in Tamaki.

The project's focus is to achieve greater equality in education through the increased use of affordable digital learning tools (Chromebooks) in school and at home. Most of the children are already behind in many areas of their learning, and the "digital divide" is widening. If unaddressed, this will result in a continued increase in the gap between the educational achievements of children in higher decile schools and those in lower decile schools such as in Porirua and Ōtaki.

The project also offers an additional mode of learning for some young people, particularly boys, who do not always relate to traditional methods of teaching and who can remain disengaged throughout their school lives.

The active engagement of families, whānau and the wider community in the children's learning is a critical part of the project. It is expected that this will then contribute to a wider cultural shift in which families will value education more highly, give it a greater priority, and see it as a key to helping their young people move out of poverty, with their children having the educational and job opportunities they never had.

A "Kawa of Care" has been drawn up which each parent must sign to show their understanding of, and commitment to, the project and the part they must play in its success. The parents make a regular payment and ultimately own their child's device.

The outcome is a community taking responsibility for educational achievement, a community where schools work collaboratively sharing resources, resulting in enhanced and accelerated learning success.

The project's focus is to achieve greater equality in education through the increased use of affordable digital learning tools (Chromebooks) in school and at home.





J R MCKENZIE TRUST

1940-2015

75TH ANNIVERSARY

HONOURING A LEGACY
CELEBRATING ACHIEVEMENT
LOOKING TO THE FUTURE

2015 marks the 75th anniversary of the Trust's establishment. Over this time the Trust, set up by Sir John McKenzie, has given over \$83 million to support New Zealanders in need.



History — Ko tō mātou whakapapa

Set up in 1940 by Sir John McKenzie (KBE), and continued today by his family, the J R McKenzie Trust has a long and proud history of helping to build stronger communities in New Zealand. Over the past 75 years the Trust has given over \$83 million to support New Zealanders in need.

Sir John McKenzie established the Trust by donating a third of the profits from his successful nationwide chain of department stores, McKenzies.

His strong personal belief in providing benefits and assistance to people in need was based on his own poor origins and his need 'to give something back' remained constant throughout his life and the lives of McKenzie generations to come.

In its early days the J R McKenzie Trust was one of the largest, if not the largest, non-government funder in New Zealand.

Sir John's son Sir Roy (ONZ, KBE) greatly increased the Trust's size and profile, set up several other charities, and was a major figure in New Zealand philanthropy until his death in 2007.

Over the decades the Trust has been an early supporter of many of what are now New Zealand's leading community organisations – groups such as Women's Refuge, People First, CCS Disability Action, the Stroke Foundation, Relationship Services, Rape Crisis and Age Concern. The Trust has also supported many local and ground-breaking organisations working within marginalised communities.

Our key areas of focus today are disadvantaged children and their families, and Māori development. As an independent philanthropic Trust we work with our partners across the public, private and voluntary sectors to contribute to our vision of 'A socially just and inclusive Aotearoa New Zealand'.

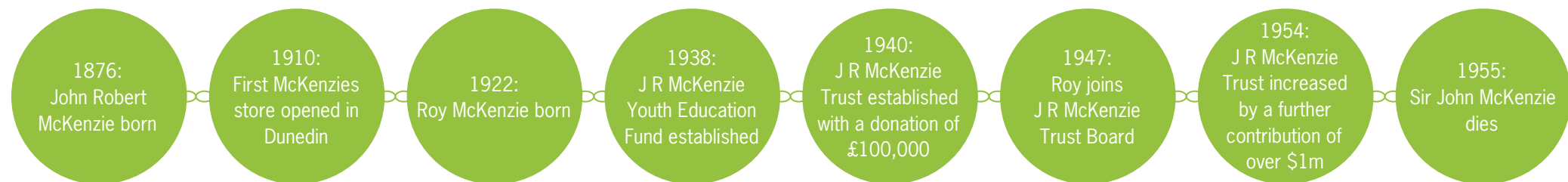
Our approach is apolitical and our focus is on building the problem-solving infrastructure of the community in a way that mobilises all its diverse parts – tackling causes, and empowering iwi/hapū and communities to work together and lead their own solutions.

In 2015 we will honour the legacy of the McKenzie family, celebrate the Trust's achievements over the past 75 years, recognise the contributions of the New Zealanders and organisations involved, and look forward to the next 75 years.



Currently the family is represented on the J R McKenzie Trust Board by cousin David Vance and Chris McKenzie, a great-grandson of the founder.

For more information about the McKenzie family and Trust you are can visit the McKenzie Room, J R McKenzie Trust, Level 4, 116 Lambton Quay, Wellington or our website: www.jrmckenzie.org.nz



History — Ko tō mātou whakapapa

Sir John Robert (J R) McKenzie, 1876-1955

Sir John left school at the age of thirteen to deliver newspapers. When he died in 1955, he was one of New Zealand's wealthiest men.

JR to his friends, Sir John was the epitome of the self-made man - honest, hardworking and generous. A leading retailer, company director, philanthropist, Rotarian and sportsman, he contributed more than three million pounds to New Zealand charities in his lifetime.

In addition to establishing his philanthropic trusts, Sir John actively supported numerous charities and voluntary organisations. He had special concern for the needs of returned servicemen and underprivileged children, for whom he was determined to provide education opportunities that he had been denied. In his retirement he enjoyed horse breeding and harness racing at the family homestead near Christchurch. He died aged 79 in London in 1955. Twelve months later Lady May McKenzie passed away. Given her fondness for gardening, it is fitting that she is remembered with a Memorial Garden for the Blind in Wellington.



New Zealand mourns the passing of a most generous benefactor and sportsman.

He was one of our finest citizens, who made an outstanding contribution in many directions to the life of our country.

~ Prime Minister, Rt Hon G S Holland

1966-85:
McKenzie
Education
Foundation
established

1970:
Sir Roy becomes
chair of
J R McKenzie
Trust

1986-95:
Roy McKenzie
Foundation
established

1992:
Deaf Decade
(later called Deaf
Development Fund)
established

1993:
Sir Roy steps
down from
J R McKenzie
Trust Board

2007:
Sir Roy McKenzie
dies

2010:
J R McKenzie
Trust creates new
strategy

2014: JRMT
receives IFIP
award for funding
indigenous
development





History — Ko tō mātou whakapapa

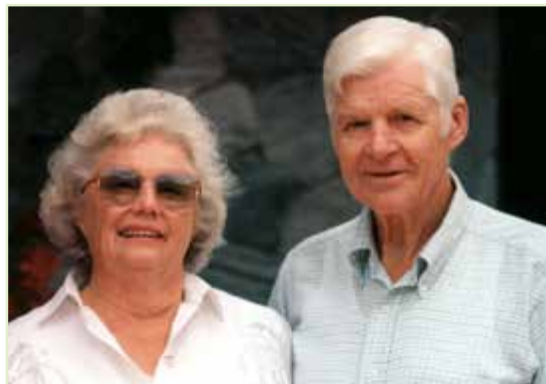
Sir Roy McKenzie, 1922–2007

When Sir John passed away in 1955, Sir Roy continued the McKenzie family tradition of ‘service above self’.

He contributed to the fledgling stages of many charitable organisations, including the hospice movement, bilingual teaching, music therapy and adult education. He supported the establishment of Women’s Refuge at a time when little was understood about domestic violence. Other organisations to benefit from his active and hands-on support include: Te Ōmanga Hospice; Deaf Institute of New Zealand Trust; Ngā Manu Trust; Outward Bound Trust; NZ Council for Educational Research; Birthright; SPELD; NZ Institute of Mental Retardation; National Parks Centennial Commission; and the Rotary Club of Wellington.

In 1993 Sir Roy finally retired at the age of 70 but continued to take a very active interest in all aspects of the work of the Trust.

Sir Roy died in 2007 and Lady Shirley in 2012, leaving behind grandchildren, great grandchildren and a wonderful legacy of support for those in need. Their two sons John and Peter served on the J R McKenzie Trust Board, and other family members continue to contribute today.



Lady Shirley McKenzie and Sir Roy McKenzie



*Top: John and the late Peter McKenzie, Sir Roy’s sons.
Bottom: Chris McKenzie and David Vance
the current family members on the
J R McKenzie Trust Board.*

*The Dominion Post editorial and obituary described Sir Roy as
“The millionaire who mucked in”.*



Our Children, Our Choice

Child Poverty Action Group (CPAG) is an independent charity working to eliminate child poverty in New Zealand through research, education and advocacy.

In a country like New Zealand, with abundant resources, child poverty could be eliminated completely. It's a matter of choice.

Everyone agrees children need the right conditions to grow into healthy adults. Children thrive when they have the basics: nutritious food; a warm, safe home; medical attention if they are sick; and a good education. Sadly, too many children in New Zealand don't have these.

CPAG speaks out on behalf of the thousands of children (260,000) in New Zealand whose meagre standard of living compromises their health, education and well-being.

In recent years there has been a noticeable shift in public mood about child poverty, from denial and even ridicule a decade ago, to widespread acceptance and concern about its consequences. Recent opinion polls showed that the combined issues of inequality and poverty surged past other concerns to become the number one election issue for New Zealanders in 2014.

CPAG welcomed and built on these developments, consolidating its position as *the* authoritative, independent voice on matters relating to child poverty. CPAG's research and policy advice addresses the underlying causes of poverty in which children live rather than band-aid charity approaches, and is highly regarded by politicians, academics, children's advocacy groups and others who appreciate their high standards and independence.



In the last year only, CPAG has published leading research on the impact of benefit sanctions on poor families, the revolving door of school transience associated with poverty, and the links between poverty and child abuse, as well as background papers on the cost of doctors' visits, the need to invest in all new-borns, New Zealand's debt society and the impact of the Canterbury earthquakes on children.

CPAG's annual Post-Budget Breakfast events have achieved national reach, being held in the main centres from Whangarei to Dunedin, with a combined audience of 450 attendees hearing expert analysis of the budget and its impact on children and families.

In 2014, this work culminated in *Our Children, Our Choice*, CPAG's 5 part policy series putting children at the centre of the political debate, and a hikoi for children when hundreds turned out to make visible their concern for the nation's most vulnerable children and build support for better policies to eliminate poverty.

CPAG continues to work to protect children from needless poverty, because a child's potential is a terrible thing to waste.



Children thrive when they have the basics: nutritious food; a warm, safe home; medical attention if they are sick; and a good education. Sadly, too many children in New Zealand don't have these.



Social enterprise delivering an excellent service

The Clean Team was set up in the 1990s as a supported business, offering employment to people recovering from mental illness. At the time it received government subsidy and came under the wing of the Wellink Trust, a Wellington community organisation.

Alex, a team leader at Wellink, bought the Clean Team business from the Trust in 2006, taking the risk that it could survive as a stand-alone, unsubsidised business, still employing the same workforce.

Although the cleaning industry is very competitive, the Clean Team has not only survived but thrived. They clean our offices at the J R McKenzie Trust and have done so, well, for years.

What's more, a few months ago Alex read about the Living Wage. He thought that it made sense and increased his workers' wages to match it. He didn't seek publicity for this or make a fuss; he just did it because he thought it was the right thing to do.

In the case of the Clean Team, the raise wasn't that much actually. His cleaners were already paid well



above industry rates. Alex's philosophy is "it's about people, not just profit". He believes in "capitalism with an ethical framework". His other guidelines for success are: be polite and have fun!

We salute Alex and the Clean Team. This is a social

enterprise, and has adopted the living wage in a low wage industry, without any formality or trumpet blowing.

Another lesson from this story is that sometimes, those seeking to change the world – like the Living Wage Movement – have more impact than they realise.

“We salute Alex and the Clean Team. This is a social enterprise, and has adopted the living wage in a low wage industry, without any formality or trumpet blowing”

Whakatipuranga Rima Rau student success comes full circle

Medical Radiation Technologist Danielle Frost has come full circle, recently talking to Taranaki secondary school students about her experiences with the Why Ora programme, and how they can be supported into a health career.

Danielle says, “Students know about jobs like doctors, nurses and physios, but there are whole range of health career options out there that nobody thinks about, like radiology. I could see interest spark in the students’ eyes when they realised the options available to them — especially when they found out that not every health career requires years and years of training.”

Danielle first found out about the Why Ora programme (previously Incubator) when she was nearing the end of her studies at Hawera High School. Students interested in health careers were taken to look around Taranaki Base Hospital, and then those interested in tertiary study, on a trip to Auckland University.

The Why Ora team also helped Danielle secure an internship over the summer at the end of her first year of studies at Hawera hospital. She worked in physiotherapy, occupational therapy and with the district nurses and emergency departments to help her decide on the direction to take her studies.

Danielle has now finished her studies at UCOL and works throughout Taranaki for Fulford Radiology Services, “I really enjoy the variety of my work and being back home. In the future I would like to get more into

emergency and trauma radiology, where you never know what’s going to ‘come through the door’.”

The Why Ora programme profiles the range of health career options to secondary school students with a view to influencing their decisions to take up a health career. It is part of **Whakatipuranga Rima Rau** (WRRR), a joint venture between Te Whare Punanga Kōrero, the Ministry of Social Development (Work and Income) and the Taranaki DHB to increase the Māori health and disability workforce over ten years, funded by TSB Community Trust and J R McKenzie Trust.

To the end of June 2014, 369 students have taken part in Why Ora from 13 secondary schools. 54 are currently studying a health related subject at a tertiary institute. 106 students registered in 2014. 43 of these are Year 13 students, 29 of which intend to follow a health career pathway in 2015.



Accident & Emergency: Jack George and Ellie Smith



Shem Te Ngāhue; Kingsley Woodhead & Luke MacLeod



Danielle Frost



Collaboration breeds collaboration



The J R McKenzie Trust is one of six funders contributing to the **Working Together More Fund (WTMF)**. An example of collaboration itself, the Fund helps community groups explore ways to work more powerfully through collaboration.

SVS-Living Safe (formerly Stopping Violence Services Nelson) together with Male Room Incorporated, were one of 36 grants approved last year, aiding 154 community groups in working collaboratively. Recently completed, their project was to pilot a trauma intervention programme aimed at training service providers how to identify and help male survivors of sexual abuse.

Dee Cresswell, SVS-Living Safe Manager, found working collaboratively on the project enhanced relationships. "As the project continued, it was evident

these relationships grew and strengthened." The exercise attracted other groups involved in a similar area to participate. This included Nelson's Department of Corrections who helped develop and implement the piloted training programme. "Corrections became a key partner as we worked with their clients who were victims of sexual abuse. It provides evidence that organisations seen to be collaborating successfully, are noticed by others who share similar goals."

"Together we were able to articulate a wider vision that was inclusive of each organisation. This shared vision, as well as understanding and respecting the expertise of both agencies, provided a strong base to move forward."

Dee says the project highlighted the breadth of knowledge present in their small community. "The

expertise present in a mix of Government Agencies and the NGO sector emphasises the need for organisations to look beyond their immediate day to day work and focus on a wider 'industry' specific vision."

SVS-Living Safe are committed to maintaining the newly formed relationships. "A measure used to determine the success of our project, is the commitment to continue working together." Together, they can achieve more for the community than they can alone.

"DID YOU KNOW since late 2009, the WTMF has paid over \$1.4 million in grants, 165 applications have been approved bringing together over 630 organisations?"



Representatives of the Working Together More Funders: left to right Bede Martin, Adrienne Thurston, Helena Francis, David Todd, Charles Wilson and Robbie Tindall



The representatives meeting to consider grant applications



SVS-Living Safe preparing their application

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 2015 are 27 February and 24 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.



J R McKenzie Trust delegation receives the 2014 International Funders for Indigenous Peoples award, acknowledging successful approaches to supporting indigenous development. Mereana Selby, Manaia King (deputy Chair), Antony Royal, Rachael Selby.

The closing dates for applications in 2015 are 27 February and 24 July.



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

HE KOROWAI TRUST, To move whānau from substandard or state housing dependence to affordable home ownership on a drug, alcohol and violence free site, Year 1 of 2 \$131,528

ACTION FOR CHILDREN AND YOUTH AOTEAROA, Advocacy to maximise government compliance with UN Convention on the Rights of the Child, Year 4 of 5 \$100,000

AUCKLAND REFUGEE COUNCIL INC, To advocate for the rights of asylum seekers and convention refugees, Year 1 of 3 \$144,000

AUCKLAND REGIONAL MIGRANT SERVICES CHARITABLE TRUST, The facilitation of ARMS' social enterprise activities with refugee and migrant women, Year 3 of 3 \$264,284

CHILD POVERTY ACTION GROUP, To fund Executive Officer, Researcher and Communications Officer salaries, Year 1 of 3 \$300,000

CONSTITUTIONAL TRANSFORMATION WORKING GROUP FOR IWI CHAIRS GROUP, To hold another 10–12 hui (in addition to 200 already held) to complete a model Constitution and develop an implementation strategy, Year 1 of 1 \$130,000

GREAT POTENTIALS FOUNDATION, Salary for the HIPPY NZ Training Manager, Year 1 of 3 \$240,000

IMAGINE BETTER, To advance the Youth Transition Strategy for young people with disabilities, Year 1 of 1 \$95,037

INTERSEX TRUST, To enable ITANZ to deliver training/ education programmes around Aotearoa, Year 3 of 3 \$270,000

LIVING WAGE MOVEMENT AOTEAROA NZ, To deliver leadership training so communities can engage with powerful decision-makers and transform lives of New Zealanders, Year 1 of 1 \$30,000

MANA TĀNE ORA O AOTEAROA, Raise awareness of men's health issues to improve Māori men's health, Year 1 of 2 \$355,000

NATIONAL COLLECTIVE OF INDEPENDENT WOMEN'S REFUGES, Seed funding to establish second-hand boutiques to will provide future sustainable income, Year 1 of 1 \$80,000

NGĀ HONONGA MARAE (CHARITABLE) TRUST, Establish a Community Business Development Hub in Whanganui, Year 1 of 1 \$246,000

NGĀ KANOHI MARAE O WAIRARAPA, Rangatahi Tū, Rangatahi Ora: a marae based trades training programme, Year 2 of 2 \$250,000

NGĀ TĀNGATA MICROFINANCE TRUST, To extend microfinance services and advocacy, Year 2 of 2 \$319,060

ROBSON HANAN TRUST, Rethinking Crime and Punishment — justice reform advocacy, Year 3 of 3 \$242,000

SHAKTI LEGAL ADVOCACY & FAMILY SOCIAL SERVICES, Mobilisation of ethnic young people against family violence and abuse; resource for youth leadership training, Year 1 of 1 \$52,420

TE AHIKAA ROA TRUST, To employ a manager to co-ordinate building more rammed earth papakainga in Te Taitokerau, Year 1 of 1 \$50,000

TE ARA TIKA O TE WHĀNAU TRUST, To employ a key worker to influence change of social disadvantaged in vulnerable families for positive outcomes, Year 1 of 2 \$160,000

TE KAHUI O TE RANGI, To hold a series of 4 3-day noho to transform participants to a place of understanding, and to know who they are as Tāne, Year 1 of 2 \$160,000

TE KOROWAI AROHA O AOTEAROA, Training advanced practice models for whānau practitioners, Year 1 of 2 \$215,248

TE MAURI O PŪAUAKI CHARITABLE TRUST, To empower men to build confidence and restore mana, to nurture and care for self, whānau, hapū, iwi and community, Year 2 of 2 \$38,460

TE MAURI TAU, To continue the development and expand the wider delivery of a non-violent parenting programme model, Year 3 of 3 \$300,023

TE PŪMAUTANGA O TE ARAWA CHARITABLE TRUST, To contribute towards growing and connecting the future leadership of Te Arawa. Year 1 of 1 \$65,000

TE REANGA IPURANGI OTAKI EDUCATION TRUST and TE MANA O KUPE, To employ an executive officer, whānau engagement coordinator and administrator, to engage children and their families in digital learning, Year 1 of 3 \$315,000

TE RŌPŪ PĀKIHI, 2040, Kia Māori 24/7: Projects to maximise the prospects of survival of Māori as a people through the expression of kaupapa tuku iho: values inherited from tūpuna Māori, Year 2 of 2 \$300,000

TE RŪNANGA Ā IWI O NGĀPUHI, Creating and delivering toolboxes for building Marae capacity and capability Year 2 of 2 \$21,000

TE RŪNANGA O NGĀI TAHU, To complete the first phase of Te Huringa, a financial literacy resource website targeting Māori youth aged 16-26, Year 1 of 2 \$100,000

TE RŪNANGANUI O NGĀTI POROU, To support the Marae Development Project— Ma Wai Ra? To build the skills, structures and support for Ngāti Porou Marae and hapū to maintain the centres of their communities, Year 1 of 3 \$150,000

THE ICEHOUSE (MĀORI UNIT), To improve leadership of Māori Trusts to ensure financial sustainability and improve the wellbeing of Māori whānau, Year 1 of 2 \$180,000

THE NEW ZEALAND ETHNIC EMPLOYMENT EDUCATION AND YOUTH DEVELOPMENT CHARITABLE TRUST, An educational catch up programme for refugee-background youth, Year 2 of 2 \$208,000

VICTORY COMMUNITY HEALTH, Wages and overheads for the Keep Victory Safe community development project, Year 2 of 2 \$100,000

WESLEY COMMUNITY ACTION, To develop a long term sustainability plan for the Mana Wahine project. Year 1 of 1 \$86,000

WHAKATIPURANGA RIMA RAU, Identify, facilitate and fill 500 employment opportunities for Māori within the health and disability sector, Year 2 of 2 \$320,000

WHĀNAU ENTERPRISE DEVELOPMENT TRUST, Develop a small farm business on Māori land in Te Whaiti, Bay of Plenty, and establish a training centre for whānau/hapū round the country. Year 3 of 3 \$182,400

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

ACHIEVE — THE NATIONAL POST-SECONDARY EDUCATION DISABILITY NETWORK, Toward administrator wages, Year 1 of 3 \$3,000

ANGLICAN SOCIAL JUSTICE UNIT, CHRISTCHURCH, A nationwide school competition on child poverty, Year 1 of 1 \$5,000

BIRTHRIGHT CHRISTCHURCH INC., To attend "Māori in the 21st century" training, Year 1 of 1 \$450

BRAINWAVE TRUST AOTEAROA, A fathering campaign for Māori fathers based on what works, Year 1 of 3, \$20,000

CAMPAIGN TO MAKE WELLINGTON THE BEST PLACE TO RAISE A FAMILY , Feasibility study for a child wellbeing focused collective impact initiative, Year 1 of 1	\$10,000
CENTRE FOR NEW ZEALAND PROGRESS , Step It Up — two events as part of a movement building strategy, Year 1 of 1	\$20,000
EMERGE SUPPORTED EMPLOYMENT TRUST , Transition parenting circles, supporting parents of young people with disability, Year 4 of 4	\$15,000
EQUALITY NETWORK , To pay for a planning summit of like minded organisations, Year 1 of 1	\$4,460
INCOME EQUALITY AOTEAROA NEW ZEALAND INC. To upgrade and maintain their website, Facebook and Twitter presence, Year 1 of 1	\$4,000
KORORĀREKA MARAE SOCIETY INC. , Workshops to teach piupiu making as a business opportunity, Year 1 of 1	\$5,000
LAW FOR CHANGE OTAGO , Projects regarding criminal justice, human rights and legal education, Year 1 of 1	\$7,577
MANCHESTER HOUSE SOCIAL SERVICES SOCIETY INC. For a wrap around service for young families breaking the cycle of intergenerational social dependency, Year 4 of 5	\$20,000
NEW ZEALAND COUNCIL OF CHRISTIAN SOCIAL SERVICES , To develop an evidence base to influence the development of government social services purchasing policies, Year 1 of 1	\$10,000
PEOPLE FIRST NEW ZEALAND NGĀ TĀNGATA TUATAHI , Donation for People First 10 Year's Anniversary Celebration, Year 1 of 1	\$2,500
PHILANTHROPY NEW ZEALAND , Half day workshop on poverty reduction and collective impact with Liz Weaver, Tamarack Institute, Year 1 of 1	\$1,500
ROYAL NEW ZEALAND PLUNKET SOCIETY — LAKES AREA , Parenting Education Programme drawing on Mana Ririki and Whakatipu, including evaluating and disseminating findings, Year 1 of 1	\$20,000
START TARANAKI , An external qualitative evaluation, information from young people and their whānau, Year 1 of 1	\$20,000
TARANAKI EMPLOYMENT SUPPORT FOUNDATION , Community organisations workshops, Year 2 of 2	\$5,000
TE RŪNANGA O NGĀTI WHAKAUE KI MAKETŪ , Business case for cultural tourism in Maketū, Year 1 of 1	\$5,500

TE WĀNANGA O RAUKAWA , Ngāti Raukawa kaumātua interviews on mātauranga and kaiakiitanga, Year 2 of 2	\$20,000
THE NEW ZEALAND FEDERATION OF FAMILY BUDGETING SERVICES (INC.) , Social enterprise project to encourage core budgeting skills, Year 1 of 1	\$20,000

Other current projects

J R MCKENZIE YOUTH EDUCATION FUND , Small grants to individuals and families for children's educational costs; administered by Rotary, Annual grant	\$180,000
WORKING TOGETHER MORE FUND , 5 other funders to promote and enable collaboration among community groups, Annual grant	\$100,000
OFFICE OF THE CHILDREN'S COMMISSIONER , Produce and disseminate Child Poverty Monitor, Year 2 of 5	101,500
NEW ZEALAND CHILD AND YOUTH EPIDEMIOLOGY SERVICE Data analysis and production of the Children Poverty Monitor Technical Report, Year 2 of 5	\$323,217

Connecting Education and Communities grants

TE HUARAHI , Schools and whānau working together to improve educational outcomes for Māori, Year 4 of 5	\$203,680
HOROWHENUA PASIFIKA EDUCATION INITIATIVE , Engaging Tongan and Samoan families in early childhood education in Levin, Year 3 of 3	\$156,250
WAITAKERE IMPROVING SCHOOL ATTENDANCE PROGRAMME , Success for Little People — an initiative to ensure that all 5 year olds are ready for school, Year 2 of 2	\$100,000
RAURIMU AVENUE SCHOOL , To use a whānau concept to promote learning, Year 2 of 2	\$28,000
RUAKAKA SCHOOL , Educational community support, Year 1 of 2	\$34,400
WAIMATE MAIN SCHOOL , A cluster of schools working together to engage families, Year 1 of 2	\$25,000
THE LEARNING FUND — small grants to support schools and community groups learning about effective family engagement	
• Rotorua Pacific Islands Development Charitable Trust	\$500
• Manurewa Parenting Hub Inc	\$400

• South Wairarapa District Council	\$500
• South Wairarapa District Council	\$500
• Far North REAP	\$500
• Te Horo School	\$500
• Te Huarahi	\$400

Pūtea Toro grants

THE UKE SHACK KAUTA CHARITABLE TRUST (T.U.S.K) To assist with costs of hosting a Maya/Toltec delegation to New Zealand, Year 1 of 1	\$10,950
PHILANTHROPY NEW ZEALAND MĀORI ADVISORY COMMITTEE , Geoff Aigner to attend Te Huihuinga-a-lwi hui, Year 1 of 1	\$3,500

Deaf Development Fund – total granted \$83,695

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

- 11 individual study awards to support students in the Certificate in Deaf Studies: Teaching NZSL at Victoria University.
- Sir Roy McKenzie VUW Deaf scholarships awarded to 2 Deaf students completing Bachelor's degrees at Victoria University
- A national family camp, and 3 Deaflympics sports competitors.
- NZSL interpretation at 2 CIRCA theatre performances in Wellington.
- Establishing a digital archive of historical NZSL and Deaf Community film footage, "Sign DNA".

THE PENNY WENT NZSL FAMILY LEARNING FUND is separately managed by the Deaf Development Fund Committee — total granted \$16,450

Grants were made to families and parent groups across New Zealand to support families of deaf children to learn NZSL in various ways, e.g., group or family tuition, supporting a playgroup, funding a mobile app, "Rhyme with Signs", for pre-school signers.



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.

The mission of Rangatira 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 2013-14, the J R McKenzie Trust received \$3.9 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:

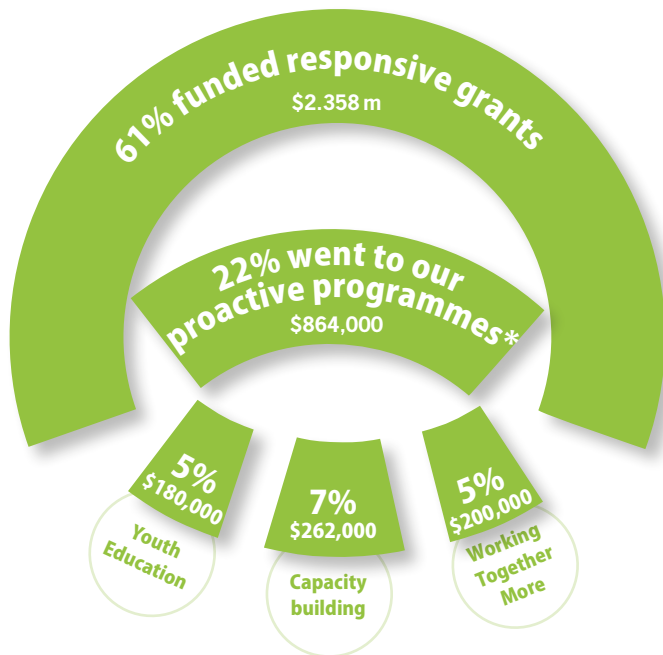


“This scale of investment in a single project or area could have a really significant impact, generating a much greater ‘social return on investment’ than could be achieved by continuing the present strategy.” – Peter McKenzie

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 contribute to the reduction 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.

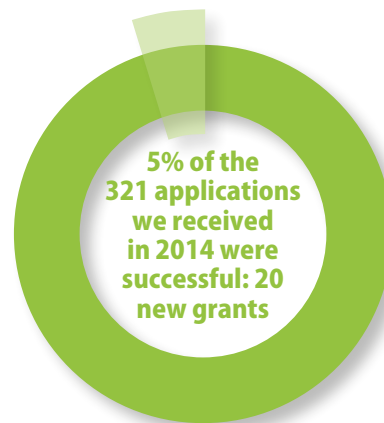
Finances — Ngā Pūtea

BUDGET THIS YEAR **OVER \$3.8m**



* Te Kāwai Toro
Connecting Education and Communities

OUR RESPONSIVE GRANTS



LARGEST GRANT



\$355,000

AVERAGE

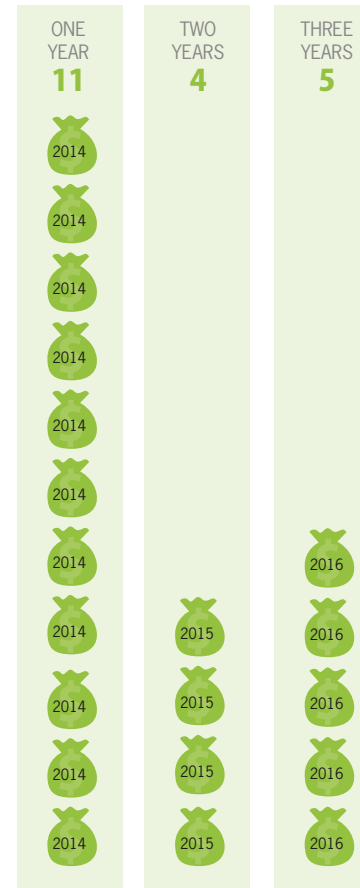


\$115,000

SMALLEST



\$5,000



RESPONSIVE GRANTS **FOCUS**

- 57%** Maori development
- Disadvantaged
- 27%** children & their families
- Social justice
- 16%** & inclusion

RESPONSIVE GRANTS **AIMS**

- \$811,500** More effective programmes (8 projects)
- \$1,243,420** Improved capacity (11 projects)
- \$581,577** Better public policies (4 projects)**

**Does not add to 20 as some projects fill more than one aim.

FINANCIAL YEAR ENDING 31 MARCH 2014

	2013-14	previous year
Grants and other support	\$2,821,981	\$2,588,064
Other spending on community support	\$338,874	\$220,947
Operating costs including salaries	\$671,353	\$727,977
Total Trust funds	\$94,282,808	\$85,017,416

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

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



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

