

THE AORAKI FOUNDATION

Our Board 2020-2021



Anna Wheeler
Chair



Jenny Carter-Bolitho



Andrew Laming



Rene Crawford



Andrew McRae



Lili Delwaide



Robyn Hewson



John Coles



Leoma du Toit



Mark Kroening



Stephen McFarlane

The Foundation acknowledges also, all past Trustees and staff who have contributed to the growth of the Aoraki Foundation, as well as new Trustees who have joined us in the 2021 year.

THE AORAKI FOUNDATION

At a Glance

Endowment Funds
at Year End totalled
\$5,583,904

Donor
Contributions to
Endowment Funds
\$428,082

Total Distributions
\$290,513

Pass Through
Funding Distributed
to Projects
CPlay: **\$60,500**
Timaru Lions Bike
Skills Park: **\$100,841**

This total is made up from:

Aoraki Foundation Endowment Funds:	\$3,609,348
Aoraki MRI Charitable Trust:	\$1,974,556
	\$5,583,904



GRANT RECIPIENTS

2020-21

YMCA SOUTH &
MID CANTERBURY
\$30,000

ST MARY'S
CHURCH TIMARU
RESTORATION
\$1700
CHARITABLE
TRUST BOARD

ROYAL NZ
PLUNKET TRUST
\$4296.80
SOUTH
CANTERBURY

BLIND LOW
VISION NZ
\$5100

SC HOSPICE
\$12,198

RONALD
MCDONALD HOUSE
\$10,000
SOUTH ISLAND

ROTARY CLUB OF
TIMARU NORTH
\$1300

ST JOHN
TIMARU
\$5000

VOLUNTEERING
MID AND SOUTH
\$985.20
CANTERBURY

TIMARU GIRLS
HIGH SCHOOL
\$20,000
TEEN SUPPORT
UNIT

CENTRECARE
WAIMATE
\$20,000

PRESBYTERIAN
SUPPORT
\$10,905.86
SOUTH
CANTERBURY

POINT BUSH
ECOLOGICAL
\$30,000
RESTORATION
TRUST

SC CAR CLUB
\$10,000

FAMILY MENTAL
HEALTH SUPPORT
\$10,000

THE STROKE
FOUNDATION
\$5543.31

TIMARU MENTAL
HEALTH
\$1294.78
SUPPORT TRUST

LEARNING 4U
\$3900

LIFE EDUCATION
TRUST
\$5500
MID AND SOUTH
CANTERBURY

HIGH COUNTRY
MEDICAL TRUST
\$12,500

HE MANA HOU
TRUST
\$19,058.91

CHRISTIANS
AGAINST
\$2000
POVERTY NZ

GERALDINE
CHILDREN'S
\$2000
SOCIAL WORK
TRUST

CCS DISABILITY
ACTION
\$215

ALZHEIMERS SC
\$5000

CHAIRS REPORT

Anna Wheeler



As I reflect upon the year as a new chair at our community foundation, the Aoraki Foundation, I am left both inspired and proud.

I am inspired by our donors, who fully embrace the foundation model, local generosity, giving now, and lasting for generations to come in our region. I am inspired by the small, but efficient Aoraki Foundation team, both staff and trustees, who generously nourish the foundation with expertise, drive and a deep community mindedness. And I am proud of our community, who continues to demonstrate resilience, and sustained generosity through an extraordinary year, where COVID-19 continues to challenge us all. COVID-19 has certainly placed pressure on our charitable sector as we collectively work to protect those most vulnerable in our region.

This year was one of change in leadership in the foundation, with the resignation of the previous chair, Stephen McFarlane, trustees John Coles, Mark Kroening and executive officer, Leah Bradley. Our sincere thank you goes to these people, who have generously and competently contributed to the growth and health of our foundation to a place where we can leverage from, now and into the future.

It is with great pleasure we have welcomed new trustees Jenny Carter-Bolitho, Andrew Laming, Greg Anderson and Tony Alden to our board, all of whom humbly reflect South Canterbury community spirit and visionary philanthropic leadership. Additionally, we welcome two new members to the Aoraki Foundation operational team. Brittney Bowie as executive officer, and Nicola Buckingham as administrator. Brittney and Nicola's combined expertise is certainly valued, and we feel confident in our future.

With the changes in personale, we worked to refresh our collective Aoraki Foundation vision, "Advancing South Canterbury, for now, forever". This refreshed vision is reflective of our collective drive to continue to ensure giving in our thriving community is easy, impactful now and for generations to come.

We have also worked to refresh our three-year strategy to support the continued growth of our community asset, grow our presence in our community, and ensure that at our core, we embrace the heart and desires of our generous donors.

We know that the success of our local community foundation will be reflective of local donors and impactful intergenerationally.

Through our work we are thankful to our Community Foundations of New Zealand (CFNZ) network of 17 Community Foundations, and the national directors, Eleanor Cater and Arron Perriam who continue to share expertise, experience, and inspiration. Additionally, we thank the expertise of Stacey Scott (previous national CFNZ chair, and Aoraki foundation board member) who was co-opted to support the development of our strategy and new member orientation. With this supportive network it is evident that collective intelligence in community philanthropy across New Zealand is truly inspiring and bodes well for the future of charity in our local communities.

Aoraki Foundation enjoyed another healthy return on invested capital, with funds under management at the end of the 20/21 financial year totalling over \$5.4 million. The community foundation model invested in perpetuity certainly demonstrates resilience through a volatile year. The Aoraki Foundation board refreshed the investment and finance advisory committee, chaired by trustee Andrew Laming, with members Dale Walden (from Forsyth Barr), Greg Anderson (trustee), Nick Noone (Noone Plus, our financial manager) and myself as board chair. The expertise in this committee certainly complements our continued focus on the growth of our community asset alongside our trusted investment management advisors through Craigs Investment Partners and NZ Funds.

Lastly, as I reflect on this year, I am inspired by our future opportunity. I know that the Aoraki Foundation journey is still young, with infinite opportunity ahead of us to grow our community connection and generosity exponentially. This is exciting for all that live in our region, our place, our community. As we continue to build our presence, I am humbled by the continued support, aroha, community spirit and willingness to give to support our thriving community.

EO REPORT

Brittney Bowie



After just a few quick months having the privilege of supporting the Aoraki Foundation in the role of Executive Officer, I am in awe of the growth of the Foundation to date.

From a response to community need in 2009, to the current Aoraki Foundation of 2021, Foundation growth to date has involved the dedication, expertise, and hearts and minds of previous Trustees and Staff. These people had a vision for a community asset for South Canterbury, which will endure forever.

In the last 12 months, Leah Bradley, our previous Executive Officer, and the board have been busy continuing to grow the Foundation's connections and presence in our community, while undergoing large changes within the organisation. You will see some of their key achievements outlined in this report, and they certainly are great achievements.

I am delighted to join the Aoraki Foundation along with Nicola, our Administrator to promote to the future of the Foundation and by virtue of that, the future of the wonderful region of South Canterbury. We know that the charitable organisations in our area are working tirelessly to support those most vulnerable in our region, in particularly trying times, and we are fortunate to be able to work collectively with those organisations, for the benefit of our region.

We are proud to be involved with some key projects in our community by providing administrative support. These community projects, the Timaru Suburban Lions Bike Skills Park and Caroline Bay Playground Upgrade Project (CPlay) we hope will be treasured community resources forever, and we acknowledge the volunteers who are

working tirelessly to provide these resources to our community.

Thinking about the year ahead, the Foundation looks to continue to grow our presence in the community, by seeking out opportunities to speak with groups and individuals to share the work the Foundation is doing, and the generosity of our donors.

Having invested in increasing the staffing level to two, we will be looking to connect with both current and potential donors, to share with them more closely the impact of their gifts to our community and the causes that are important to them. It is a privilege to have the opportunity to meet our generous donors, and to hear their stories, and what makes them want to be part of advancing South Canterbury. These people are often unassuming, and want for no recognition, but for their community to thrive.

Thanks must go to our dedicated Trustees, who volunteer their time, expertise, and financially contribute to the operational costs of the Aoraki Foundation. I extend thanks to our 'Friends of the Foundation', who support our operational costs, either financially or in-kind with their professional services.

Finally, thank you to our generous donors, who give to our community through the Foundation. Their gifts benefit our region for now, forever. Your gifts make all the difference to so many charities and causes doing great work in our region.

Christians Against Poverty

The Aoraki Foundation General Impact Fund provided a grant of **\$2000** to Christians Against Poverty (CAP) towards Client Support Advisor salaries, to support South Canterbury based families to become free from debt.

CAP is passionate about helping families living in poverty to thrive and prosper again, through increasing their financial capability. Families in the community who call CAP for help have an average of \$28,000 of debt.

All services are free, and Aoraki Foundation's funding meant that vulnerable families living in South Canterbury were able to access CAP's Debt Help Programme for help and long-term support.

Once working with CAP, Caseworkers take over all liaison with creditors, provide a personalised budget, and walk hand-in-hand with families until they've paid off their debts (usually 2-4 years).

Families like the Diehl's as pictured, are able to engage in community, put food on the table and enjoy quality of life. During their debt repayment journey, families gain crucial financial literacy skills as they are supported and coached by Caseworkers, and are able to confidently and independently manage their own finances once they leave CAP debt free.



Photo: Supplied by Christians Against Poverty.
Mark and Carol Diehl and Family were supported by a Christians Against Poverty Client Support Advisor to become free from debt and the constraints caused by debt.

Centrecare Counselling Waimate



Centrecare Counselling Waimate were successful applicants in both our February 2021 General Impact Fund Distribution Round, and our March 2021 South Canterbury Health Endowment Distribution Round, receiving grants totaling **\$20,000**.

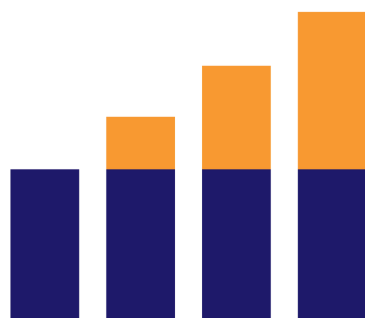
Centrecare Counselling provide counselling services in both Timaru and Waimate, as well as Oamaru, and our funding helps to keep this accessible to their clients by reducing waitlists and costs to users.

Centrecare are committed to removing barriers to their services, and have a low cost to user model, and can respond to all requests for counselling within one week of contact.

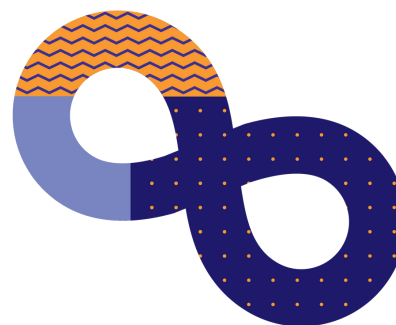
The Community Foundation Model



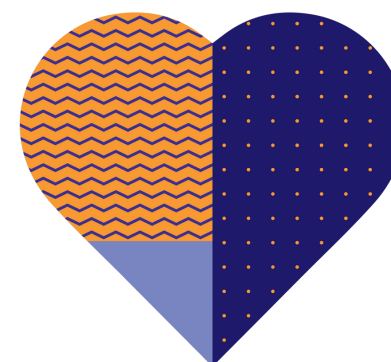
Your gift



**is invested
and grown**



**and the ongoing
income earned**



**goes to the local
causes you love**

Source: Community Foundations of New Zealand

Aoraki Foundation is proud to be a member of the Community Foundations of New Zealand. There are over 1800 Community Foundations worldwide, and 17 in New Zealand. This model of philanthropy is a global movement which has been growing for over 100 years, and in New Zealand since 2003. We are proud to stand beside our Community Foundations Network, advancing our respective parts of New Zealand, for now, forever.

Ronald McDonald House South Island

Ronald McDonald House South Island were the recipients of a **\$10,000** grant from the Aoraki Foundation Health Endowment Fund.

This funding was allocated to Ronald McDonald House to support South Canterbury families who needed to use their services. Each year they provide a home-away-from-home for more than 1,200 families while their children are undergoing medical treatment away from home, including the family of Albie (pictured).

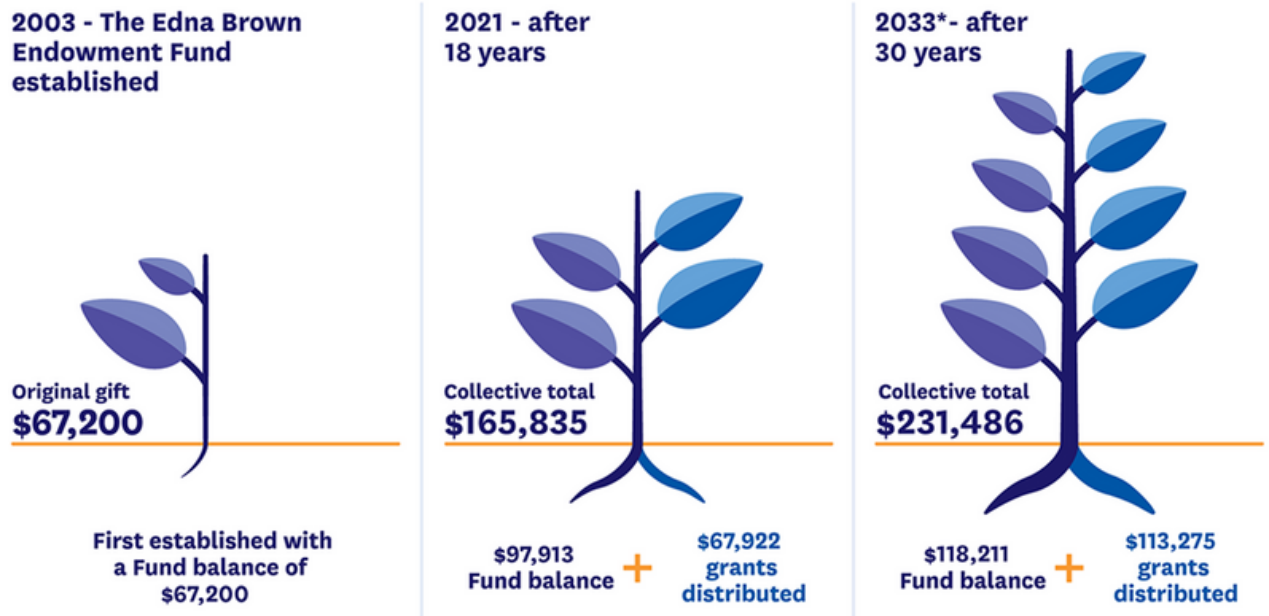
In May 2021, at six months old, Albie underwent bilateral cochlear implant surgery at St George's Hospital, a truly miraculous operation, allowing him to hear his parent's voices for the first time.

Albie's parents reflect that staying at, and being supported by Ronald McDonald House South Island allowed them to focus on what mattered most- Albie!



Photo: Supplied by Ronald McDonald House South Island

How an Endowment Fund Grows



Source: Community Foundations of New Zealand

An endowment fund is the ultimate gift that keeps on giving. With the initial gift invested and distributions made from only the income of the investment, the fund will grow and continue to support the local community forever. Take Edna Brown, who left a gift to her community in 2003. In 2021, her fund has now gifted more than it's original value back into her community, and the fund balance increased by \$30,000. By 2033- after 30 years, it is expected that Edna's gift will have granted almost \$50,000 more than the original gift, and have a capital value of over twice the original gift.

Life Education Trust Mid & South Canterbury



Photo: Supplied by Life Education Trust Mid & South Canterbury

Life Education Trust Mid & South Canterbury were the beneficiaries of funds from the Aoraki Foundation General Impact Fund and the Aoraki Foundation South Canterbury Health Endowment Fund in the 2020-21 year.

Grants to Life Education Trust Mid & South Canterbury totalled **\$5500** and supported their health and wellbeing education service to provide materials to support their curriculum, and to increase health and safety provisions to ensure students are safe while moving around their mobile classroom.

Alzhiemers South Canterbury

Alzhiemers South Canterbury provide advocacy, education and support to people who are diagnosed with dementia, and to their families, whanau.

Socialisation is proven to be an important activity for maintaining brain health for those who suffer from dementia, and Alzhiemers South Canterbury provide support groups in the remote areas of Twizel, Fairlie, Geraldine, and Waimate to promote this activity.

The Aoraki Foundation South Canterbury Health Endowment Fund provided a grant of **\$5000** towards the costs of facilitating these support groups.



Photo: Supplied by Alzhiemers South Canterbury

Hospice South Canterbury

Hospice South Canterbury were successful applicants to the South Canterbury Health Endowment fund, and were awarded a combined **\$12,198** for provision of an Invisa beam fall prevention monitor, as well as a Wissner-bosserhoff bed.

The Wissner-bosserhoff bed provides extra safety and comfort for patients, allowing for customisation of fit for individual patients, and a sensor system to alert staff of any exit from the bed.

Hospice South Canterbury is proud to prioritise the comfort and safety of all patients while they are in Hospice, and their Nurses say the Invisa beam is "like having an extra pair of eyes to ensure patients are safe". We are proud to support the work that they do.



Photo: Supplied by Hospice South Canterbury featuring the Wissner-bosserhoff bed and Invisabeam Fall Prevention Monitor

Family Works Christmas Angel Project

Christmas can be a joyous time, and it can also be a time of great stress and struggle for some South Canterbury Families.

With the help of an Aoraki Foundation General Impact Fund Grant of **\$10,000**, the Family Works Christmas Angel Project identifies families in need in our community and connects them anonymously with groups in the community who wish to gift to these families for Christmas.

The response from the community has been overwhelming with workplaces, community groups, schools and friend groups all becoming 'angels' for those in need at Christmas time.

The Aoraki Foundation Grant has allowed this project to employ a part time coordinator to oversee this project.



OUR DONORS AND PARTNERS

FRIENDS OF THE AORAKI FOUNDATION

(who support our operational costs)



Riverview
Farming

John & Jocelyn
McFarlane

Lions Club of
Geraldine

Mark Kroening

John Coles

Rebecca Biggs

Lili Delwaide

Stephen McFarlane

Robyn Hewson

OUR GENEROUS DONORS AND ENDOWMENT FUNDS

Alpine Energy Ltd

Miller Estate Fund

South Canterbury
Health Fund

Environmental
Fund Donor

AJ Shewan
Heritage Fund

Swimming
Fund Donor

Ashley Shewan Health
Endowment Fund

Aoraki Water
Trust

St Andrews Youth
Endowment

Scott Family
Endowment Fund

SC Nursing Education
Endowment Fund

Cody Hunter Timaru
Host Lions Club
Endowment Fund

YMCA SC

YMCA SC were the recipients of two Aoraki Foundation grants this year, to a total of **\$30,000**.

These grants supported YMCA to provide proactive resiliency skills to South Canterbury Youth, and to provide access to their Y•Drive Community Driving Scholarship programme.

The Y•Drive Programme provides driving lessons and support to members of our community who do not have the ability to meet the costs of driving lessons and fees associated with getting a driver's licence, and are not eligible for MSD (Ministry of Social Development) funding.

Driving enables people from low-income families, migrants/refugees and other at-risk adults living within our community to have the opportunity to progress into employment, become independent and reduce social isolation.



Photo: (Left to Right) Aoraki Foundation Trustees Mark Kroening and Robyn Hewson, YMCA Drive 2 Work Manager and Driving Instructor Sharyn Kake (in car), YMCA Driving Instructor Julie Loffhagen and Aoraki Foundation Executive Officer Leah Bradley

St John Aoraki Health Shuttle



Photo: Supplied by St John Timaru Area

The Aoraki Foundation South Canterbury Health Endowment Fund provided a grant of **\$5000** to the St John Aoraki Health Shuttle.

Despite the current pandemic, the Aoraki Health Shuttle team helped more than 430 clients get to vital medical appointments in Christchurch. The Health Shuttle picks up clients in Timaru, Winchester, Geraldine, Temuka and Hinds, as well as smaller towns on the route to Christchurch.

Many of their clients can't drive or are not well enough to cope with the stress of driving or getting a car park near to their destination. The appreciation volunteer drivers receive when they provide them with this alternative is rewarding. One volunteer driver says he enjoys the camaraderie of this fellow shuttle volunteers.



**Aoraki
Foundation**

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