

Wakatipu Community Foundation

Giving Impact Report 2023

Celebrating our First Five Years



Wakatipu
Community
Foundation



Our region's
Community
Foundation

Welcome

Welcome to the Wakatipu Community Foundation's 2023 Giving Impact Report. As we celebrate our first five years, we extend our heartfelt gratitude to you.

Our steadfast mission is to nurture philanthropy in the Wakatipu Basin. With your support, we've launched and delivered a myriad of initiatives including the Greatest Needs Fund, Impact100, Generation Give, corporate giving, grant assistance, and scholarship programmes. Our innovative approach to creating bespoke endowments, coupled with our smarter giving model, ensures that your generosity continues to resonate in the community you cherish.

Your contributions, when entrusted with us, are thoughtfully invested. This not only allows them to grow but also generate interest, culminating in a sustainable, long-term financial resource for the causes close to your heart. To leave a lasting legacy in the community, reach out to us.

Reflecting on our journey, we are indebted to Sir Eion Edgar. His invaluable contributions in the formative years of our organization have been monumental. Sir Eion shared his wisdom, helped shape our vision, and even lightened moments with tennis games and wine toasts. Without him, our achievements would not have scaled the heights they have. A heartfelt toast to Sir Eion, in his memory, Jan, and the entire Edgar family.



At our Professional Advisor Meeting, May 2021. Pictured left to right: Sir Eion Edgar, Hon Grant Robertson, Jennifer Belmont, Raymond Key



Message from the Chair

RAYMOND KEY

As we conclude another transformative year, it is an honour to present the Chairperson's Report for the financial year 2023. This year has been another remarkable journey, filled with milestones that have not only met but often exceeded our expectations. The resilience, generosity, and community spirit that define Wakatipu have been more evident than ever. This report marks the 5th anniversary of the foundation's establishment and for people like Jennifer and me it seems only recently we held the launch of the Foundation at the Heritage Hotel with such goals and ambitions. Much has been achieved to date, but most importantly, the awareness of the Foundation has grown significantly. We have attracted great people as supporters and volunteers and have made an impact in our Wakatipu community. This impact will increase for generations to come thanks to our initiatives, our ever-increasing Wills base legacy funds that will come into action over future years as well as the passion and hard work of Jennifer, Euni, and our volunteer-based trustees and ambassadors.

FINANCIAL MILESTONES

New Sub funds and Legacy Funds

- 18 New Sub funds: This year, we were thrilled to welcome 18 new sub funds to our portfolio. This is a significant increase that reflects the growing trust in our mission and the willingness of our community to invest in its future. These funds represent community groups, initiatives or the legacies of amazing people or families that want to help our local community for now and forever.
- \$10 Million in Wills-Based Legacy Funds: The commitment of individuals who deeply care for our region has been overwhelming. An additional \$10 million has been written into wills-based legacy funds, ensuring perpetual support for various community groups in Wakatipu.
- We are proud to say that we are one of the fastest growing community foundations in New Zealand.

Grants and Endowments

- \$450,000 in Community Grants: We have successfully disbursed \$450,000 in grants to deserving community initiatives, touching lives and making a real difference.
- \$500,000 in New Endowments: An additional \$500,000 has been added to our endowment funds, which will generate a sustainable income for future grants.

EVENTS AND COMMUNITY INITIATIVES

Biennial Gala

Our biennial Gala was a resounding success, drawing over 500 attendees. The event served as a platform to honour and celebrate the incredible volunteers who are the heartbeat of our community.

We strongly believe that too often volunteers are not recognised or under appreciated. This night is all about them!

Impact100

As I pen down this report, our Impact100 initiative is on the verge of granting another two \$100,000 transformational grants with 200 local women supporting the initiative. This will bring the total giving to over \$600,000. It was only 4 years ago that the global founder of Impact100, Wendy Steel, visited our foundation, organised by long term Foundation trustee Kristen Holtzman. Impact100 has achieved so much so quickly and is one of the leading chapters globally.

Love Wanaka, Love Queenstown Initiative

In a groundbreaking partnership with Lake Wanaka Tourism and Destination Queenstown, the Foundation is supporting the launched the Love Wanaka, Love Queenstown initiative. This program encourages both domestic and international tourists to contribute to our region, initially focusing on local environmental initiatives. This has so much potential and is necessary to balance the impact of tourism and reinvest into our community.

COMMUNITY IMPACT

Local Scholarship Program and Grant Writing Service

I must extend a special thank-you to Euni Borrie for her tireless efforts in launching and managing our local scholarship program. This platform allows groups, individuals, and families to set up their own scholarship funds under the Foundation's umbrella. Euni has also been instrumental in supercharging community groups to access funding through her free grant writing service. To date, this has facilitated more than \$600,000 in funding for a wide array of community groups.

Funding the Scholarship and Grant Writing Service

I would like to extend heartfelt gratitude to Craig and Emma Mawdsley, and other donors whose generous contributions have been pivotal in funding our scholarship and grant writing services. Their support has acted as a huge multiplier, enabling us to reach more people and make a greater impact.

SPECIAL ACKNOWLEDGMENTS

Donors and Supporters

We are profoundly grateful to our corporate supporters, which include Deloitte, Gibbston Valley Wine, Mackersy Property, Duncan Cotterill, Mountain Club, and Queenstown Airport Corporation, who joined us this year. We also acknowledge the invaluable support from the Tindall Foundation and the Dick and Diana Hubbard Foundation.

Trustees and Team

A special thank-you to our outgoing trustees Jonathan Gurnsey, Andrew Davis, and Ron Mackersy for their invaluable contributions. We are excited to welcome our new trustees Joan Kiernan, Stephen Brent, and Paul Rea as well as incumbent trustees Kristen Holzman and Michael Walker. A big shout-out to Jennifer for her relentless drive, passion, and hard work in growing the Foundation.

OUTLOOK

As we look ahead, one of our main priorities for the next 12 months will be to raise additional funds for our administrative, branding, and marketing efforts. This is crucial for expanding our reach and making more people aware of our services. Our whole team is excited about the future and how much our community can achieve.

CONCLUSION

The Wakatipu Community Foundation is more than just a charitable organisation; it is a community of people committed to making a lasting impact. It is only through the collective efforts of generous individuals and businesses that we can sow the seeds for a brighter future for our community.

Thank you for your unwavering support.

Warm regards,
Raymond Key
Chairperson, Wakatipu Community Foundation

Our Strategic Framework

Wakatipu Community Foundation Strategic Plan 2021–2025

Tagline: Your Community. Your Legacy. For Good.
Our Vision: Building a thriving and vibrant Wakatipu community through the power of giving.

Our Mission: To inspire and promote long-term giving in the Wakatipu Basin by connecting people who care with causes that matter in order to make a substantial and sustainable impact in our community.

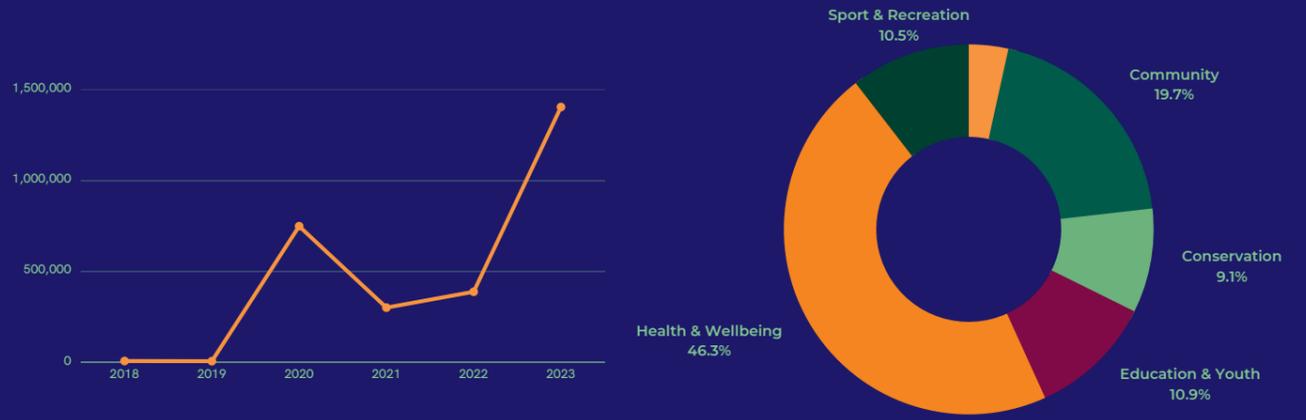
Summary

	DONORS	INVESTMENT	DISTRIBUTION	OPERATIONS
Strategic Aim	Engage and retain new and existing donors at increasing levels each year, with an authentically personal style.	Invest funds prudently to achieve maximum returns for minimum risk, to best meet the needs of our donors and the community.	Distribute grants strategically, in accordance with the donors wishes, and discretionary funds in line with the needs in the community as determined by QLDC Quality of Life survey and other metrics.	Recruit Board members, staff and volunteers who are professional, publicly trusted, personally committed and well supported to achieve WCF's goals.
Strategic Goals	Gain new donors to meet ambitious annual growth targets.	Confirm that Investment policies and processes are prudent and responsive to the market and WCF's needs.	Establish Distribution process and internal capacities that are robust, dedicated and specialised.	Regularly refresh governance to ensure breadth of skill sets, networks, reputation and community balance is achieved.
	Retain existing donors and enhance their level of satisfaction through WCF's know-how and connections.	Report regularly and urgently if needed.	Focus distributions on donor wishes, proven evidence of need, causes that matter and WCF's strategic intent.	Ensure that Staff and volunteers are skilled, driven and given the tools, support, resources and incentives they need to succeed.
	Establish endowment funds that are managed in efficient, donor-friendly ways.	Provide investment returns to support WCF's unique role in connecting generous people with causes that matter, forever.	Link outcomes to SDGs, QLDC Vision 2050, and Quality of Life Surveys and other metrics.	Demonstrate philanthropic leadership wherever possible as a Board and management team.
Main Targets	Increase the number of funds to 50 by 2025.	Growth in endowment funds to \$5 million by 2027.	Establish Grants Committee, Grants Administrator, Grants Strategic Plan. \$250k Annual Distributions by 2025.	100% Operational Funding continued through 2025; CRM fully implemented; Communications Plan Developed.





Growth and Impact: Grant Funds Distributed



Financial Summary 31st March 2023

INCOME	
NET INCOME	\$125,216.57
ENDOWMENT FUNDS RECEIVED	\$551,980.85
TOTAL INCOME	\$677,197.42
EXPENSES	
OPERATING EXPENSES	\$195,210.31
GRANTS AND DONATIONS MADE	\$458,129
TOTAL EXPENSES	\$653,339.31
NET PROFIT	\$23,858.11
ASSETS	
TOTAL CURRENT ASSETS	\$780,250.38
TOTAL NON-CURRENT ASSETS	\$1,316,118.89
TOTAL ASSETS	\$2,096,369.27
LIABILITIES	
TOTAL CURRENT LIABILITIES (INCLUDES GRANTS PAYABLE)	\$673,235.89
NET ASSETS	\$1,423,133.38

\$2.5M
AMOUNT OF GRANTS INTO THE COMMUNITY
2018-2023

\$4M
RAISED IN ENDOWMENTS AND
PASS THROUGH GIVING
2018-2023

\$35M
PLEGGED IN LEGACY BEQUESTS

We are delighted to provide an overview of the grants distributed between 2018 and 2023, reflecting the heart of our community's generosity and commitment to bettering various sectors.

With profound gratitude, we acknowledge our generous donors, dedicated giving circles, and the relentless initiatives of the community foundation and donor-driven contributions. Their collective spirit has been pivotal in fueling these distributions. In total, the grants have had a wide-reaching impact across varied sectors, enriching lives and fortifying the pillars of our community.

Living in such a generous and caring community is truly a blessing. The collective efforts, year after year, not only highlight the depth of compassion but also the shared vision of a prosperous future for everyone. Thank you to each and every individual and organization who has played a role in this transformative journey. Your benevolence continues to inspire and uplift.

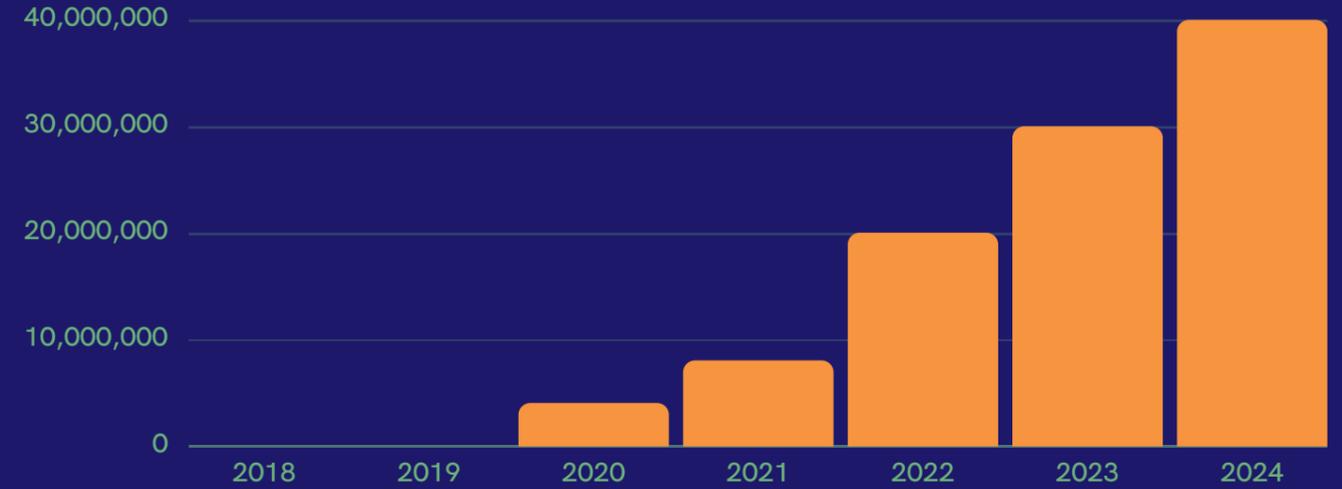


Through our generous donors, these are some of the groups we have supported over the last several years (2020–2023)

- Antarctic Trust
- Antenatal-Postpartum
- Arrowtown Autumn Festival Scholarship
- Arrowtown Charitable Trust
- Arrowtown Primary
- Baby Box
- Baskets of Blessing
- Canterbury Brain Trust
- Central Lakes Family Services
- Central Otago Life Options
- Champion Foundation - Matts Good Walk
- Citizens Advice Bureau
- City Mission Christchurch
- Cromwell Early Learning Centre
- Dipton Scholarship
- Fiordland Arts Society
- Fiordland Community -
- Fiordland Outdoor Playgroup
- Food for Love Wanaka
- Glenorchy Community Association
- Glenorchy Heritage Museum
- Glenorchy Primary
- Good Bitches Trust
- Happiness House
- Head Light Trust -
- Holyford Conservation Trust
- Japanese Family Society -
- Kahu Youth Trust
- Kate Moetaua Scholarships
- Kings View School
- Kiwi Harvest
- KPCA - Kelvin Peninsula Community Association
- Life Education Trust Heartland
- Otago Southland
- Mt Aspiring College
- Mums 4 Mums Cromwell
- Murihiku Maori & Pasifika Cultural Trust
- Nga Manu Hou
- NZ Deerstalkers Association
- Pasta Cafe
- Pivotal Point Charitable Trust
- Plunket
- Presbyterian Church
- QAMPI - QAMPI Immigrant Training
- QLDC - Kia Kaha Community Hub
- Queenstown Associated Football Club
- Queenstown Chinese Community
- Queenstown Community Hub Charitable Trust
- Queenstown Housing Trust
- Queenstown Hub Trust
- Queenstown Indian Community
- Queenstown Islamic Centre
- Queenstown Korean School
- Queenstown Primary
- Queenstown Rotary Club
- Queenstown Tennis Club
- Queenstown Trails Trust
- Remarkables Primary
- Robotics Trust - Generation Give Grants
- Routeburn Dart
- Salvation Army
- Shotover Primary
- SKAL Queenstown
- Southern Lakes Sanctuary
- Southern Wellbeing Trust
- St John
- St Joseph's School
- Sunrise Foundation
- Te Atamira Whakatipu Community Trust
- Te Kura O Take K Te Hau Toka
- The Kiwi Kit Community Trust
- The Lightfoot Initiative
- The Whitmarsh Academy - WHS
- Girls football coaching Term 2
- Three Lakes Cultural Trust
- Tumble Time Te Anau
- Turn The Corner
- Turn Up the Music
- Victim Support
- Volunteer South
- Volunteering Otago
- Wai Wanaka
- Wakatipu High School
- Wakatipu High School Foundation
- Wakatipu Presbyterian Church
- Wakatipu Reforestation Trust
- Wakatipu Toy Library
- Wakatipu Youth Trust
- Wanaka Nepalese Society
- Wanaka Wastebusters
- YSAR Trust



Growth and Impact: Bequests and Number of Funds



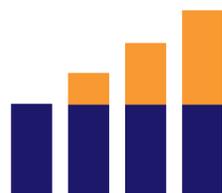
Amount of pledged bequests per year with anticipate bequests for FY 2024



Number of funds initiated per year



Your gift



is invested and grown



and the ongoing income earned



goes to the local causes you love.

Our Growing Family of Local Philanthropy



Youth Philanthropy Programme

GENERATION GIVE

a programme of **YPNZ**

Impact100 Wakatipu Chapter



Spirit of the Wakatipu Gala and Awards

WAYFARE

SPIRIT OF THE WAKATIPU GALA & AWARDS

WAKATIPU COMMUNITY FOUNDATION

Wakatipu Greatest Needs Fund

Scholarship Funds

Charity Endowments

Family Endowments

Workplace Giving

Corporate Endowments

Community Giving



In the news

IMPACT 100

Wakatipu

Impact100 has been making a big, well-earned impact in the region since 2020 and is one of the Wakatipu Community Foundation initiatives.

Impact100 is a very simple concept where one hundred women each donate \$100. Once they have that money collected, groups in the community are invited to apply for the whole amount, a whopping \$100,000 with each of the four runners up receiving a \$5000 grant. The applications are considered, and the finalists present their projects, showing how they will use the money, who will benefit from this new project, and why their idea will make the biggest positive impact in the community.

Over the last 2 years, \$320,000 has been raised through Impact100 and donated to local organisations. The 2022 winner will be announced at a dinner on October 27th.

The inaugural \$100,000 Grant Winner in 2020 was Living Options. In 2021 the grant went to Pivotal Point Charitable Trust.

By Sue Foa

Turn Up The Music Charitable Trust wants to instill the love and joy of music in every pre-school centre in the Wakatipu Basin from February next year.

A successful pilot programme for the proposed GO MUSIC concept has already introduced hundreds of local preschoolers to the delight of music.

The trust, formed in 2019, now wants to extend the programme to every local child under five, by providing free music lessons at the almost 40 early childhood centres around the basin for the next three years. Turn Up The Music was recently named among the five finalists that applied for Impact100 Wakatipu's \$148,000 grant from its supporters. The winners will be announced on October 27 once the supporters have voted for their preferred choice. Each of the five finalists will receive \$5000 coming from this year's \$148,000 funding pool.

"If we're successful the funding would ensure the programme could run in every centre for three years," says Mary. "We're sure that from then on the Ministry of Education, and other funders would support this initiative, once they've seen the outcomes." Early childhood teachers would observe and document the outcomes, which Mary says have been proven, both nationally and internationally, time and time again.

"Music changes lives. The benefits are well-established and profound," says Mary, who's been at the forefront of early childhood education for more than 30 years as a former kindergarten teacher and award-winning children's television producer. "It's fun, joyful and engaging for children, providing skills that foster creativity, strong memory and adaptability."

"We kicked off PLAY MUSIC in primary schools a few years ago and we've seen incredible results," she says. Despite being an unsuccessful finalist in a previous round of Impact100 funding, Mary says the trust managed to make the PLAY MUSIC programme happen in a couple of local schools. It was then taken up by Auckland-based Youthtown, which runs programmes that benefit youth.

"Music is socially and emotionally stimulating. They often have to share and move together, while also having an opportunity to let out what they haven't been able to," says Mary. "It assists with all brain connection and engagement. Kids need to have fun and laugh again." Mary says the experience of music from an early age stays with youngsters forever. "Any early childhood teacher will say that the impact of Covid was very hard on children, emotionally, physically, intellectually, even spiritually, as it affects their free spirit and well-being," she says.

"We already offer subsidies and scholarships to primary school aged children and we want to broaden that primary age base to give younger children a solid base in music too. You build a really solid base very young it will benefit the children all the way through their lives."

Personally, Mary always taught music during her kindergarten teaching career. It was a huge part of the curriculum back then, but for whatever reason it's not been as much of a priority for resources and funding, she says. During her 25 years producing successful children's television shows, including the Splat Catoo preschool series, and more recently, The Four and Code Fun, music has been key. "I've probably produced 17 early childhood shows in 30 years and there's always been a strong focus on music," she says. "I'm extremely passionate about GO MUSIC and the enormous impact it would make on the young children and families in the Wakatipu."

LIKE MUSIC TO THE EARS



Erica Hastie shares some fun and laughter with local children.

Turn Up The Music already has UK-trained, early childhood, primary school and violin teacher, Erica Hastie, contracted to run the pilot. Erica would work full time rolling out GO MUSIC to local early childhood centres, including Playcentre, Kindergartens and Educare facilities. Erica would lead weekly music sessions in each centre, observing alongside teachers and also take workshops for teachers, and parents who want to join in. "The early childhood teachers here are very excited to be part of the programme," says Mary. The workshops will offer teachers simple techniques that work well with children and are especially useful for teachers with no musical background.

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Te Atamira was recently named one of the five finalists that applied for Impact100 Wakatipu's \$148,000 grant from its supporters. The winners will be announced at a dinner on October 27 where the supporters get to vote for their preferred choice. Impact100 will also donate \$5000 to each of the runner-up organisations out of a total \$148,000 funding pool.

"We were drawn to apply for this year's Impact100 grant as our idea aligns with the trust's vision of providing a platform or stage in Te Atamira for the community to shine. It's a great opportunity to showcase our talents and passions to the community. We're excited to be part of the finalists and to see how we can make a difference in our community through this initiative."

"We've designed a programme, 'Ara For All', and if we're successful it would provide the opportunity to showcase and directly reach about 3,000 people in two years, rather than slowly over the next eight years."

The programme includes three areas - equal access for the community to creativity, engaging with programmes in different ways, and supporting the development of a well-connected arts ecosystem and more professionalised arts sector.

While 'Wiggle and Rhyme' and Turn up the Music's 'Magical Music With Eric' operate for the Mayor's 'In the Space' in the same, Olivia says

who will benefit from this new project, and why their idea will make the biggest positive impact in the community.

Te Atamira is now keen to expand participation and opportunities for equal access to creativity. The new programme would be fun, support fine motor skills and cognitive development, and help manage emotions in our complex world, she says. The talented local arts and cultural scene has been supported for decades by hardworking volunteers and has largely been hand-to-mouth. With more than 400 artists registered with the Te Atamira Cultural Trust, there is an opportunity to develop capability, broaden engagement and further support arts practice with residences and internships, Olivia says.

It's required an enormous community effort to establish Te Atamira. "Hundreds of people have contributed ideas and provided feedback," says Olivia. "We've been supported by more than 400 generous donors and the fit-out was completed by a locally based team of architects, engineers, project managers and Cook Brothers Construction. Despite the challenges of Covid and material shortages the outcome has been a very functional and fit for purpose space, the most beautiful and well-used in the basin."

"We have hit the ground running," says Olivia. "Our children's school holiday programme this month (October) has attracted for 290 children with only a few spaces left. It included a street dance workshop, Arts Foundation, Springboard Awards CONAHL."

The final five for 2022 are:

- Life Education Trust Heartland Otago Southland
- Turn Up The Music Trust
- The Order of St John's Wakatipu Area Committee
- Te Atamira Wakatipu Community Trust

This is the second of three weeks where we present each finalist organisation and how they would make use of the \$100,000 grant.

There's a cause that tugged at the heartstrings of the more than 100 women benefactors who voted on this year's live Impact100 Wakatipu finalists and so St John's Wakatipu has taken out 2022's main \$148,000 funding grant.

Some beautiful stories and pitches were shared by the five finalists for this year at a gala dinner at Rydges Hotel on Thursday evening (October 27). More than 100 Impact100 women supporters who donated a total of \$148,000 for the year's round listened intently to detailed presentations about what the much-needed money would be spent on. It was then up to them to vote for a winner, with the other four charities each receiving \$5000 grants to continue their great work. These were Youth Search and Rescue Trust, Life Education Trust Heartland Otago Southland, Turn Up The Music Trust and Te Atamira Wakatipu Community Trust.

Impact100 Wakatipu chair Clare Irons says, as always, it was an extremely difficult decision to make. Needs included everything from pre-school music development programmes to kids' mental health and well-being, but St John's really really moved the women supporters, she says. "Each person from each organisation really spoke from the heart," says Sarah (Blakham, from St John's) who moved everybody and that caused us to vote for St John's. It was a big impact on people's lives," says Clare. "These are people who have even offered to become volunteer drivers on our Friendship Drive programme, which includes the popular Friendship Drive programme. Isolation and loneliness have become real problems during the events of the past two years, especially among the elderly, and Sarah says these services have become even more vital. New vehicles are desperately needed - one wheelchair capable, to keep up with demand and that's what the money would be spent on. St John's Friendship Drive, taking the elderly or housebound on fun outings around the district, were launched locally a year ago - a first for the region. Volunteer drivers collect older people, or those unable to drive, and take them on these outings where companionship is a huge focus.

"This is making a big difference, giving these people the ability to get out of the house and explore our region," says Clare. "These are people who would otherwise be housebound."

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IMPACT 100

Wakatipu

TOUCHING HEARTS ST JOHN'S TAKES TOP IMPACT100 GRANT

By Sue Foa

There's a cause that tugged at the heartstrings of the more than 100 women benefactors who voted on this year's live Impact100 Wakatipu finalists and so St John's Wakatipu has taken out 2022's main \$148,000 funding grant.

Some beautiful stories and pitches were shared by the five finalists for this year at a gala dinner at Rydges Hotel on Thursday evening (October 27). More than 100 Impact100 women supporters who donated a total of \$148,000 for the year's round listened intently to detailed presentations about what the much-needed money would be spent on. It was then up to them to vote for a winner, with the other four charities each receiving \$5000 grants to continue their great work. These were Youth Search and Rescue Trust, Life Education Trust Heartland Otago Southland, Turn Up The Music Trust and Te Atamira Wakatipu Community Trust.

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"This is making a big difference, giving these people the ability to get out of the house and explore our region," says Clare. "These are people who would otherwise be housebound."

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In the news

Dipton kids with big dreams get helping hand

"In 20 years time there could be 40 recipients who benefit from this scholarship, and it will be an honour roll not just for Dipton School but for Dipton as well."

30 JUN 2023

Share



Euni Borrie (Wakatipu Community Foundation), Mae Lagan, Olivia Chrystall, and Gordon Caddie (Dipton School principal).

Two Year Eight students from Dipton School have big dreams and have been rewarded with \$1000 each to help them on their way.

At a special school assembly Olivia Chrystall and Mae Lagan were presented with their Scholarship Awards for the Dipton Brightstart Scholarship which has been set up by an ex-pupil of the school.

Olivia Chrystall is going to use her funds towards athletics coaching, and to attend the South Island athletics competition in Dunedin next year. Her favourite event is high jump, and Olivia placed first in her age group in the Southland Primary School competition earlier this year.

Mae Lagan is a talented artist who is going to use her funds to purchase new art materials, and pay for art tuition to develop her art practice.

Principal Gordon Caddie said it was a pleasure to be able to award the scholarships to Mae and Olivia who are widely recognised as leaders within the school. They both give their time to help and support others across arts and sports and are very focused on developing their skills.

The Dipton Brightstart scholarship is decided by senior school staff, Board of Trustee members and a community member, and has been set up to be offered in perpetuity.

The Wakatipu Community Foundation Grants and Scholarship Manager, Euni Borrie, was on hand to mark the occasion. "

It's a delight to be able to present these scholarships to Olivia and Mae.

Scholarships such as this are quite rare at a primary school, and it's a wonderful opportunity for Dipton School pupils to be able to get some support to follow their dreams."

"In 20 years time there could be 40 recipients who benefit from this scholarship, and it will be an honour roll not just for Dipton School but for Dipton as well."

Community News

Two key community organisations will now receive ongoing philanthropic support from New Zealand Sotheby's International Realty.

New Zealand Sotheby's International Realty (NZSIR) has pledged to support the Wakatipu Community Foundation (WCF) and the Queenstown Lakes Community Housing Trust (QLCHT) via the new NZSIR Community Fund.



Pictured: Clodagh Hall (NZSIR GM Marketing & Ops), Julie Scott (QLCHT Executive Officer) and Ray Key (Chair of WCF)

The agency has kicked off the fund with a \$30,000 base contribution and has invited all Southern Lakes-based NZSIR licensees to also contribute to the corporate fund on a pro-property-sale basis.

NZSIR Managing Director Mark Harris says the two grassroots community organisations were the ideal recipients of the generous initiative.

"Social responsibility is very important to us as a company and we are thrilled to be giving something back to the Queenstown community," he says. "We have long talked about pledging our commitment to a certain charity or organisation that has a truly positive impact on local people and the Wakatipu Community Foundation and Queenstown Lakes Community Housing Trust do incredible work in our region. We are very proud to be supporters of that work."

WCF is a registered not-for-profit charity that facilitates bespoke endowment funds for individuals and families and provides grants to local organisations for the benefit of the wider community through arts and culture, housing, sports, youth, education and the environment.

WCF Chief Executive Officer Jennifer Belmont says the charity is delighted to welcome NZSIR on board as a corporate partner.

"The Wakatipu Community Foundation is excited to partner with NZSIR and their team of locals to provide vital funding for our community groups in the Queenstown Lakes District," she says. "Not only will the NZSIR Community Fund make an impact today, it will lead us well into the future. We also admire their leadership in showing how successful businesses can work with – and help – their community."

Harris has invited the NZSIR team of local licensees to become contributors to the fund. The company will then match every individual agent contribution dollar for dollar.

"The fund also provides a vehicle for our team members to make their own personal contributions to the wider community in addition to the contribution from NZSIR," Harris adds.

Thirty per cent of the NZSIR Community Fund will go to the QLCHT – which NZSIR is the exclusive real estate supporter of – to help fund community housing projects in the Queenstown Lakes District. Thirty-five per cent will go towards a NZSIR Endowment Fund for perpetuity, to grow and return income to the WCF on an ongoing basis, while another 35 per cent goes to a NZSIR Impact Fund to be distributed to the community annually. NZSIR will nominate which local causes the Impact Fund is directed to.

Queenstown Lakes Community Housing Trust Executive Officer Julie Scott says: "This is a unique and innovative concept from NZSIR that we welcome wholeheartedly. With nearly 800 households on our waiting list, demand for affordable and secure housing is ever increasing. We are sincerely grateful to NZSIR for these funds which will assist us in housing more families throughout the entire Queenstown Lakes District."

NZSIR is also investigating the establishment of community funds in other NZ locations.

"The feedback from our teams so far has been very positive and we are looking forward to eventually expanding this initiative into other parts of the country via Community Foundations of NZ," Harris says.

MEDIA RELEASE FROM NEW ZEALAND SOTHEBY'S INTERNATIONAL REALTY April 21, 2022.

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Playing for mates

PHILIP CHANDLER

A SOCIAL Queenstown cricket team's out to make a major fundraising splash in support of their Gisborne friends caught out by Cyclone Gabrielle.

For its 'Bat for the Bay' fundraiser, the mostly over-50s SDS (Southland Development Squad) team is embarking on a 12-hour cricket marathon next Sunday, March 5, at the Millbrook corner ground.

Between the lead-up and the day itself, it's aiming to raise at least \$50,000 to help get sports and community organisations in the Poverty Bay/East Coast areas back on their feet.

SDS formed a strong relationship with the mostly under-50s Poverty Bay Wekas after the latter first played in the annual Queenstown six-a-side tournament in 2021.

The local team's reciprocated over the past two years and enjoyed the North Islanders' awesome hospitality — SDS turned up last March just days after Gisborne had declared a flooding state of emergency.

SDS player Jono Browne says their fundraiser's a no-brainer "cos at the end of



Howzat for a fundraiser: SDS players involved in March 5's charity cricket marathon include, from left, Doug Reid, Matt Edwards, Deaneo Gray, Jono Browne, Toby Stanton, Jason Herron and Joel Peasey

day, they'd do the same for us if we were in the same situation."

"They're a great bunch of guys."

Their 12-hour cricket shift, from 8am till 8pm, comprises an inter-squad T20 game followed by 40-over games against Millbrook Cricket Club and Queenstown Cricket Club — that's 200 overs altogether.

SDS has set up a fundraising website, batforthebay.raised.com, with support from the Wakatipu Community Foundation.

"We're going to go and target businesses," captain Jason Herron says.

"We've all got people in town we're going to hit up. "We're aiming high, but whatever we raise will be great."

The cricket will overlap with the last day of the New Zealand Open golf tournament, which is also at Millbrook.

"We're hoping we might get a bit of traction from that, people wandering round or driving past."

SDS will be returning to play in Gisborne on March 31, when they'll hand over what they've raised — player Matt Edwards hopes their efforts will inspire other local groups to undertake cyclone fundraisers.

QT BUSINESS

Philanthropy tree blossoms from strong roots

By Paul Taylor

Jennifer Belmont might just have the most rewarding job in Queenstown Lakes.

As founding trustee and CEO of the Wakatipu Community Foundation, she's at the centre of an organism that helps people help others, creating a snowball effect in New Zealand's ski resort tourism capital.

WCF has been a runaway success story since it was established in 2018. One of the youngest and fastest growing of the country's 17 community foundations, it has allocated \$2.4 million in grants and pledged grants since its inception.

It now has more than \$1m in funds under management, over \$25m in wills-based endowments, and has established 41 funds and initiatives, including 14 since April.

But numbers alone don't capture the spirit of the whole.

There are hundreds of people involved in WCF's philanthropic family tree, from Belmont, the board of trustees and ambassadors, to volunteers in the various initiatives, and those on the frontline in the organisations they support.

"You get to see how incredibly this community is, everyone pulling together," Belmont says. "And I don't think we've even scratched the surface in terms of what we can achieve and how we can grow."

"Community foundations are just such a fantastic model. It's a win-win for everyone involved and enables us to be so creative with pathways for philanthropy in all its forms."

The not-of-profit aims to provide immediate and long-term funding streams.

That's done through various mechanisms, including giving circles such as Impact100, pass-through funds like the Greatest Needs Fund, and WCF's pooled fund, which retains the capital and funds projects from the returns on investment.

Individual donors and companies can direct where they want the money spent, helping to personalise the philanthropy.

"That's what I love about it. For example, we'll sit down with a donor, listen to their story, and develop a strategic plan for their giving."

"You get these lightbulb moments, when you find out what's driving them, their interests, suggest a plan, and they say 'oh wow, that would be cool, I would love to do that'."

"And those stories inspire others to give too." WCF also helps charities, such as Happiness House and Bruce Grant Memorial Trust, build their funds, creating a source of community capital in perpetuity.

Successes include Impact100, founded by Kristen Holtzman and now led by Clare Irons. Over the past three years, it has given almost \$500,000 to community projects in grants, such \$100k towards the Tom Pryde Centre in Arrowtown,

a new dedicated support centre of people with disabilities.

The Greatest Need Fund is also a win, raising more than \$1.2m to support the community through the pandemic. It was established by the indomitable Kaye Parker, who along with the late Sir Eion Edger and Mark Taylor, was a founding ambassador of the WCF.

And the WCF's scholarships and grants programme, managed by Euni Borrie, features initiatives such as the Kate Moetaua Fund, established in memory of the popular drama teacher, and led by her daughters and husband.

One major area of growth is likely to be corporate giving, both financially and volunteering, and the likes of Craigs Investment Partners and Sotheby's leading the way.

"We've had really robust discussions about what corporate giving strategies might look like. Again, it's a win-win for both sides because staff get these amazing opportunities to work with the community, which helps workplace wellbeing."

"That's going to be exciting to develop."

Belmont had started a community foundation in the US, before she moved to Queenstown nine years ago.

Looking for a place to volunteer, she realised Queenstown Lakes didn't have one of its own, so instead decided to help the Wakatipu High School Foundation.

But she says it was always in the back of her mind that Queenstown would be an ideal place to establish a community foundation, and not because it has more than its fair share of people with deep pockets.

"It's for everybody, from all different backgrounds, who can give in different ways. People can give one or more of the three Ts – time, talent and treasure."

"Sometimes in life you gravitate to giving your time, or using your talent to serve on a board



or in an organisation, and sometimes you give treasure. Even then, it doesn't have to be huge, you can have a small fund, giving \$100, \$200 a month, or whatever you can afford, and slowly it builds up over time.

"My mission, and what I love about the community foundation, is to be able to grow philanthropy in all those forms."

NEW ZEALAND / TOURISM

Queenstown Lakes visitors invited to help fund region's climate and conservation goals

2:41 pm on 4 April 2023

Share



The Love Queenstown and Love Wānaka funds will raise money for local climate, conservation and biodiversity initiatives. Photo: NZT / Tom Branson

Visitors and businesses in the Queenstown Lakes are being invited to help fund the district's goal to become regenerative and carbon zero.

Destination Queenstown and Love Wānaka Tourism officially launched community funding platforms on Tuesday.

The Love Queenstown and Love Wānaka funds will raise money for local climate, conservation and biodiversity initiatives and help to connect visitors to projects they can volunteer with.

It was the first project from the district's regenerative tourism strategy, which was endorsed by the local council earlier this year.

Destination Queenstown chief executive Mat Woods said there were many passionate people wanting to act but they did not know where to begin.

"While we don't have all the answers, we believe that the answers are out there, and we are committed to being a place that is understanding of the level of urgency and that is willing to experiment and learn," Woods said.

"No matter how big or small, donations will help support existing projects, as well as new ideas and new technologies."

Participating businesses will have both physical and digital points where donations can be made, and installations at the Queenstown Airport will detail these initiatives and how visitors can get involved.

Chief executive Gini Sorey said it was important to draw the program from idea into action.

"Everyone remembers the beginning and the end of the journey, and we want to make sure that's done really well, and we create the opportunity to create value for the fund, and that people feel a real desire and ambition to give back," Sorey said.

Lake Wānaka Tourism chief executive Tim Burke said organisations and individuals were working on decarbonisation, but often they needed more resources to scale up.

"One project or one organisation can't do it alone, so this funding will go towards supporting an entire ecosystem that works together for the greater good of this place and the planet," Burke said.

"Collective action is how we change systems, and together, we are powerful."

"The values (teiriti) created by this landscape is what shapes the visitor experience and connects everyone who visits whether for a few hours or a lifetime. This is often referred to as the kaupapa of tiaki and as visitors to this place we all have a responsibility to take up the challenge of being good ancestors."

The funds will be spent exclusively in their region of origin, with some set aside into an endowment fund for long-term, future funding opportunities.

Grant Support for St Paul's Church Restoration in Arrowtown



The WCF Community Grants Support Initiative has been working with St Paul's to secure \$160,000 in grant funding for St Paul's Restoration.

Built in 1871, and of the few Heritage Listed category 1 buildings in Arrowtown, St Paul's Church and Vestry was in need of major restoration, in particular to the roof, to make it watertight and prevent further water damage.

With the help of our Grants and Scholarship Manager, St Paul's was able to secure funding from QLDG Heritage Fund, Central Lakes Trust, Community Trust South and Community Matters (Lotto) Heritage Fund. Along with a contribution from the local diocese and some local donors, work is now underway to lift the roof and restore water tightness, replace boards and restore original fittings, repaint the church and vestry and strengthen the bell tower.

With the work completed the church should stand for another 150 years for community and family celebrations, it's parishioners, and for the many photos taken by tourists each year!

"...many thanks. It is through your major contribution that we are getting this project off the ground." Viv Kerr, Project Lead, St Paul's Church

Please get in touch with Euni if you have a project of benefit to the community that we can assist with in this way.

Matt's Good Walk

MAY 2023 - NEWS STORY, SUSTAIN

Trust supporter Matthew Rose is walking the length of New Zealand's South Island on the Te Araroa Trail and the Trust is incredibly grateful to be one of ten charities Matthew's raising funds for as part of 'Matt's Good Walk'. Matthew's generous support will help fund a young person with an explorer mindset to join our Inspiring Explorers Expedition™ - South Georgia 2023 in October.

Matthew set off on his 1400km journey in February from Ship's Cove in the Marlborough Sounds, and it will be completed three months later when he reaches Sillering Point at Bluff.

Find out more and support Matthew's progress at: mattsgoodwalk.nz



Matthew Rose officially started Matt's Good Walk heading South Bound on the Te Araroa trail. © Instagram/mattsgoodwalk

10 | MountainScene Thursday, June 30, 2022 Local Life

End of an incredible legacy

PHILIP CHANDLER

THE remaining \$288,000 from the incredibly-generous EP Wilding Estate is being bequeathed to local charities via the Wakatipu Community Foundation (WCF). The estate, which has already granted \$3 million-plus to local causes, especially those focused on sport, recreation and youth, was set up after the death of inspirational community leader, Peter Wilding, in 2006.

A Southland farmer who was awarded the OBE for services to the community and local body affairs, he retired to Queenstown's Lake Hayes in 1991.

One \$60,000 donation from his estate, for a new Whakatipu Rowing Club boat, was inspired by his widow Helen seeing high school rowers out on Lake Hayes — a donation that's helped Wakatipu High subsequently become a powerhouse rowing school.

Explaining why the final dollar's gone to WCF, which funds charitable projects through legacy funds, trustee Graeme Todd says the foundation "will provide an effective vehicle to grow and distribute our donation, ensuring every dollar contributed goes further to a worthy cause".

Todd, along with Helen Wilding, will consult with WCF over what projects this donation will fund.

"We are extremely grateful to the trustees of the estate for putting their faith behind the foundation," she says.

"This generous donation is a perfect example of the type of leadership we hope will inspire others to give back to their community, forever."



Making a difference: The Whakatipu Rowing Club's just one organisation that's benefited from the EP Wilding Estate — pictured are rower Olivia Key, 16, Wakatipu Community Foundation CEO Jennifer Belmont and estate trustee Graeme Todd

In the news



Three lifetime contribution awards were made at last Saturday's Spirit of the Wakatipu Gala & Awards evening, organised by the Wakatipu Community Foundation.

The recipients, recognised for their "extraordinary and enduring philanthropic contribution to the Whakatipu", were the late David Crow, Jillian and Dick Jardine and Darren Rewi.

A one-time meteorologist, David Crow, who died last year, aged 88, kept daily weather recordings, almost without fail, for 59 years, and was a jazz aficionado.

The Jardines this year formally gifted 900 hectares of their Remarkables Station to the QEII National Trust to ensure its landscape's protected in perpetuity.



Embracing community spirit: Dick and Jillian Jardine

They earlier gifted their original homestead to the University of Otago for use as an academic retreat.

A respected kaumatua, Rewi was rewarded for leading the Māori community through the pandemic and his contributions to youth, culture, employment, community and the environment through initiatives like founding the Mana Tahuna charitable trust.

Mayor Jim Boulton gave a special mayoral award to all the local organisations and volunteers who helped the community through Covid.

Other award recipients were the Bruce Grant Youth Trust (youth impact), Queenstown Lakes Baby Box Charitable Trust (health and wellbeing), The Rees Hotel (corporate citizenship), Lake Hayes Restoration Project (environment and sustainability), Wakatipu Search & Rescue (resilience), Age Concern (senior support), Amy Wilson-White (sport and recreation), Three Lakes Cultural Trust (arts and culture), Paul Winders (education), Hannah Batrick (rising star) and Debbi and Paul Brainerd (social impact innovators).

The spirit of the community award was shared by Jillian and Dick Jardine and the Rotary Club of Queenstown.

Held at the Events Centre, the biennial awards, postponed a year due to Covid, were attended by 420 people.

scoop@scene.co.nz

- Advertisement -

Saturday, 19 August 2023

Gift of shuttle assists region's immobile patients

80 0

Regions > Queenstown



A new shuttle to take immobile people to health appointments and out and about on "friendship drives" was welcomed by Hato Hone St John Wakatipu at a blessing ceremony in Queenstown yesterday.

The wheelchair-accessible vehicle was made possible by a \$148,000 grant from Impact100, a "women's giving circle" that is an initiative of the Wakatipu Community Foundation.

Impact100 members joined with St John staff and volunteers at the ceremony, in which Wakatipu chaplain the Rev Dr Robyn McPhail led the blessing with prayer and a sprinkling of holy water on the new shuttle.

Members of Impact100's giving circle, now in its fourth year, give \$1000 each, and local charities are then invited to submit a funding application. These are whittled down to five finalists.

Impact100 Wakatipu chair Clare Irons said the shuttle was chosen from five local projects.

"The transformational difference it will make to people's lives was the thing that encouraged people to vote for this fabulous health shuttle," she said.

The application was led by St John community engagement co-ordinator Sarah Bloxham, who said she was proud to have played a part in delivering the shuttle for the district.



St John Wakatipu staff, volunteers and Impact100 members with the new health shuttle are Julie Taverner (front, St John) and (back, from left) Sarah Bloxham, Kirsten Dennison, (both St John), Clare Irons (Impact100), Joanne Conroy (St John), Eunice Borrie (Impact100), Jennifer Belmont (Wakatipu Community Foundation), Rev Dr Robyn McPhail (St John), Joan Kiernan and Juliana Fullerton-Smith (both Impact100). PHOTO: MATT PORTER

"The shuttle enables locals who are unable to drive to get to their health appointments that are outside Queenstown, in particular Invercargill or Dunedin. The new shuttle with a wheelchair hoist will mean we can help more people to access important health services."

As well as the shuttle, Impact100's funding covered three years of fuel for the vehicle.

St John New Zealand national community care manager of health Julie Taverner said it was "amazing" that a group of women had come together to provide the big capital outlay for the shuttle and running costs.

On weekends the health shuttle acts as a mobility vehicle, taking mainly elderly people on outings called "friendship drives".

St John Wakatipu Kawarau area committee chair Kirsten Dennison Chair said ageing or disability should not equate to isolation or loneliness.

"The local friendship drives have uplifted countless lives and allowed individuals to continue contributing to our community. This transcends boundaries, not just physical, but also mental, emotional, and social wellness."

The grant has also enabled St John to purchase a new Rav4 vehicle to be used for other community education outreach programmes, connecting passengers to the shuttle and supporting the St John youth programme.

matt.porter@odt.co.nz

Our team

Trustees



Raymond Key
Chair



Joan Kiernan
Vice-Chair



Steve Brent



Kristen Holtzman



Jennifer Belmont
Founding Trustee
and CEO



Michael Walker



Paul Rea



Eunice Borrie
Grants and
Scholarships

Founding Ambassadors



Sir Eion Edgar
in memoriam



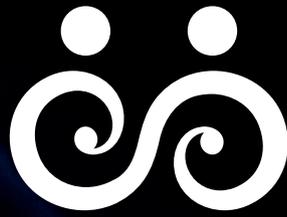
Mark Taylor



Kaye Parker

Ambassadors





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