



**OTAGO**  
Community Trust

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# ANNUAL REPORT

Rīpoata-ā-Tau  
**2023 – 2024**

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# Contents

## *Rāraki take*

**3**

**Chair & CE Report**

**4**

**Governance**

**5**

**Our Investments**

**6**

**Our Funding**

**8**

**Tamariki & Rangatahi Strategy**

**10**

**Funders Commitment To Climate Action**

**11**

**Our Community**

**17**

**Grants List**

**23**

**Financials**

## *66th Annual Alexandra Blossom Festival*

**Amount granted: \$6,000**

The Alexandra Blossom Festival is the longest-running event of its kind in the country - a celebration of spring that honours the region's fruit-growing heritage. The festival aims to provide family-friendly, affordable, and inclusive events that celebrate the local identity and welcome the new season. With record attendance over successive years, the success of the festival has benefitted the entire community, offering fundraising opportunities, fostering a sense of belonging, and promoting the town's identity to the wider region.

# Chair & CE Report

**Tēnā koutou, tēnā koutou, tēnā koutou katoa. Welcome.**

This past year has proved significant for the Trust as we navigated changes in governance and leadership. With our sights firmly set on enhancing vibrancy and resilience across the region's communities, we embraced this period of renewal and transition as an opportunity for growth. The year ushered in fresh perspectives, new responsibilities, and a reinvigorated commitment to forging meaningful partnerships that can create positive, lasting impact.

## Granting

The Trust approved \$9.89 million in grants to support over 406 community groups across our region. The largest grant of \$2 million went towards the highly anticipated Waitaki Events Centre, set to be a tremendous asset for Ōamaru and the wider Waitaki district.

Our Rangatahi and Tamariki Strategy entered its second year. Within the strategy, the Rangatahi-Led Fund was a standout, empowering four rōpū (groups) of young leaders across the region to steward a \$100,000 fund pool. With 23 grants given out this period, rangatahi led the charge in assessing and recommending grants for inspiring local youth-led projects. Beyond enabling important projects, this Fund nurtures the next generation of community leaders with skills in governance, decision-making, and partnership.

Trustees also approved two new large grants under our Impact for Tamariki and Rangatahi Fund. Funding of \$454,631 over three years for Barnardos Aotearoa in collaboration with Milton Primary School and local providers will deliver the Leap social work service. Leap provides tailored support to meet the developmental, social, and emotional needs of primary school children in the Milton community. Additionally, the Trust provided a grant of \$644,859 for the innovative Wheako Project led by the Greater Green Island Community Network Charitable Trust. It aims to holistically address the needs of children and youth in the Greater Green Island area by strengthening connections across schools, community, whānau, and an intentional community space.

## Investment

Following a challenging 2023, it was pleasing to see funds under management stand at \$313.6 million at year end, reflecting a solid annual return of 11.7%. Market volatility still persists however, and we anticipate the potential for mixed returns over coming months and years. The Trust also engaged Mercer as its new Investment Advisors from mid-2023.

## Changes at the Trust

In April, we elected Andy Kilsby as our new Chair, succeeding Diccon Sim who had provided outstanding leadership to the Trust over the previous five years. We also farewelled Trustees Malcolm

Wong, Tuari Potiki and Haley van Leeuwen. We would like to extend our sincere gratitude for their immense contribution to the Trust. Their legacy is one of stability, progress, upholding the Trust's values and tikanga and an enduring commitment to the communities we serve.

Joining the Board this year were new Trustees Robyn McLean, Carole Adair and Fraser McKenzie, whose diverse backgrounds further strengthen our governance capabilities. We would like to thank all Trustees for their time, skill and unwavering commitment to the Trust's work.

In September 2023, Jemma Adams began her role as Chief Executive of the Otago Community Trust. Having spent the last few months working with the wonderful OCT Team, she is eager to continue providing outstanding support for the varied communities within the Otago region. The Trust further strengthened its capabilities by welcoming Jen Stokes as the new Marketing and Communications Coordinator.

## Looking Ahead

The changes of the past year have ushered in fresh perspectives and opportunities. We are energised to give full effect to our strategy's four key pillars, deepening relationships and partnerships across our region with intentionality.

Reducing barriers to funding and applying an equity lens is a priority as we look to the future. We are committed to deepening our understanding of the systemic factors that can inhibit access to funding support. By proactively identifying and addressing these barriers, we can ensure our granting practices are fair, inclusive and cultivate equitable opportunities across all communities.

Our kaimahi (staff) deserve heartfelt acknowledgment - their dedication, expertise and tireless efforts propel our vision forward. The seamless navigation of this year's transitions is a testament to their professionalism and commitment to the communities we serve. Their local knowledge, community connections and on-the-ground insights are invaluable assets informing our strategy.

With new horizons emerging, we are invigorated by the possibilities that lie ahead. By embracing diverse perspectives and forging stronger connections, we can empower communities like never before. Vibrant and resilient best describes the future we collectively strive towards.

**Ngā mihi nui,  
Andy Kilsby  
Jemma Adams**



# Governance

## Tō mātou rōpū

### Our Trustees | Ō Mātou Kaitiaki

Otago Community Trust is governed by 11 Trustees who are appointed by the Minister of Finance for a four year term. While four Trustees resigned this financial year, three new Trustees were appointed in September 2023: Carole Adair, Fraser McKenzie and Robyn McLean. The appointment process is currently underway by the Department of Internal Affairs to fill the additional vacancy.

Trustees collectively hold a range of invaluable skills, experience and knowledge that guide the activities of the Trust. Trustees meet monthly to consider grant requests, strategy and governance matters.



**Andy Kilsby**  
Chair /  
Central Otago



**Barb Long**  
Deputy Chair /  
Greater Dunedin



**Alofa Lale**  
Greater Dunedin



**Bridget Tweed**  
South Otago



**Carole Adair**  
Greater Dunedin



**Diccon Sim**  
Greater Dunedin



**Fraser McKenzie**  
North Otago



**Haley van Leeuwen**  
Greater Dunedin



**Malcolm Wong**  
Greater Dunedin



**Dr Michael Stevens**  
Greater Dunedin



**Raewyn van Gool**  
Central Otago



**Rebecca Williams**  
Central Otago



**Robyn McLean**  
Greater Dunedin



**Tuari Potiki**  
Greater Dunedin

### Our Kaupapa | Ō Mātou Rautaki

Otago Community Trust is a community-owned charitable trust that provides grants to assist community groups and projects that make a significant and positive contribution to Otago communities.

#### Our Vision



Otago communities are vibrant and resilient, and protective of people, heritage and environment.

#### Our Values



- We are accessible, transparent and driven to make a difference;
- We are resilient, courageous and act with integrity, respect and prudence, valuing strong relationships;
- We are committed to the principles of Te Tiriti o Waitangi;
- We show leadership, wisdom and empathy.

#### What We Do:

##### To achieve our vision, we will:



##### Funding

Empower communities to realise their potential and goals.



##### Asset Management

As a trust in perpetuity, balance the interests of current and future generations by preserving capital and maximising granting.



##### Organisational Effectiveness

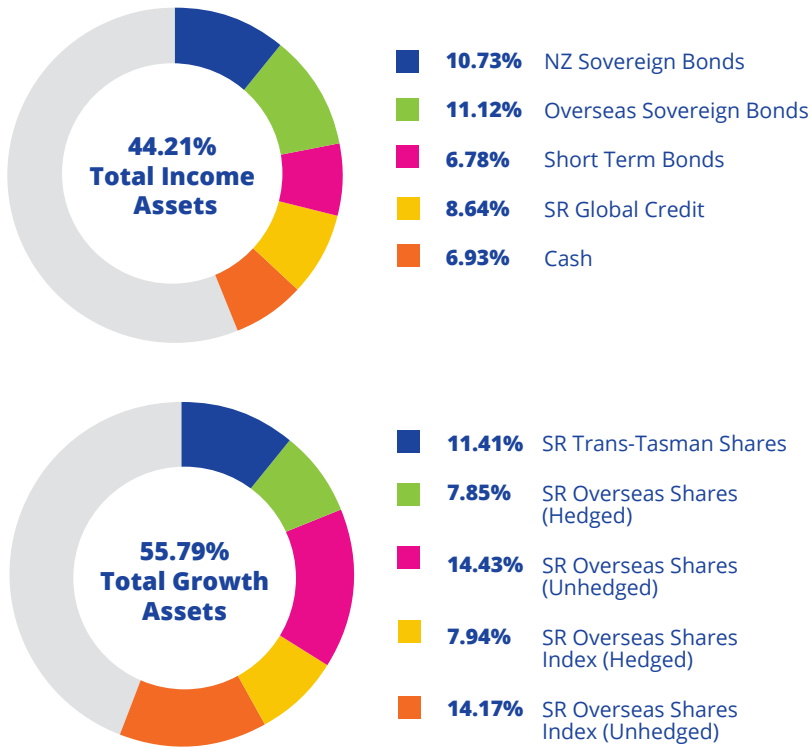
Ensure we have effective processes and resources to achieve our purpose.

# Our Investments

## Ō Mātou Haumi



### Strategic Allocation Of Financial Assets

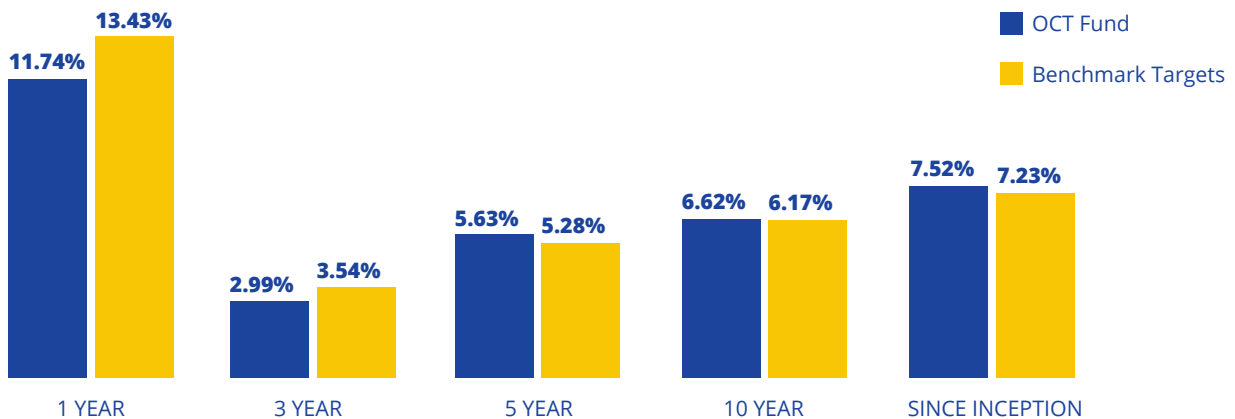


The Otago Community Trust's granting capacity is driven by the performance of its investment portfolio. As an enduring entity, the Trust seeks to increase the value of its capital fund and maximise available funding for grants, with the flexibility to respond to investment opportunities as they arise.

Global financial markets have been influenced by factors like COVID-19, geopolitical tensions, technological advancements, and central banks' policies aimed first at stimulating growth, and more recently targeted at controlling inflation. However, the dominant theme in markets this year was the expansion of Artificial Intelligence (AI). A narrow subset of technology companies, dubbed the "Magnificent Seven" (Nvidia, Alphabet, Amazon, Apple, Meta, Microsoft, and Tesla), dominated equity market returns due to their potential to benefit from the AI megatrend.

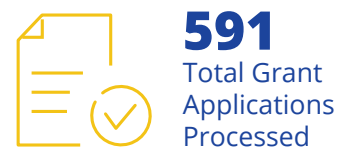
As the US signalled potential interest rate cuts in 2024, bond markets rebounded after a meteoric rise in interest rates, which contributed to poor returns last year. All sectors delivered strong returns for the latest financial year. While economic and geopolitical risks remain, it's impossible to predict which, if any, will be key themes in the new financial year.

### Otago Community Trust Annual Returns (Year to 31 March)



# Our Funding

## Tō Mātou Tahua Pūtea



Otago Community Trust provides grants to not-for-profit community groups and projects that make a positive contribution to Otago communities. The Trust's vision is that Otago communities are vibrant and resilient, and protective of people, heritage and environment. Aligned with this vision, the Trust adopted four Funding Pillars in April 2022 as key strategic focus areas, each with a set of funding priorities that form the foundation of our granting approach.

Our Funding Sectors of Arts and Culture, Community, Environment and Heritage, Learning, and Sports and Recreation allow the Trust to award a wide range of small and large grants across diverse areas.

### Granting By Funding Pillar



**96%**  
Of grants supported priority communities.

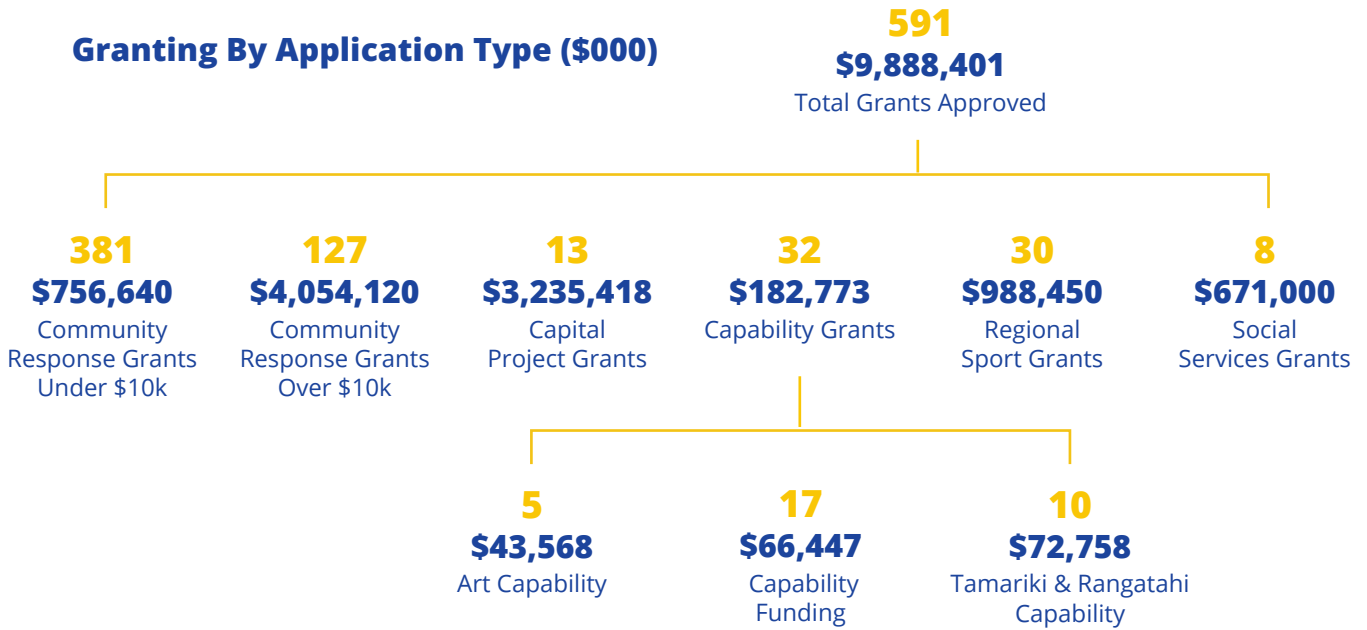
### Granting By Funding Sector



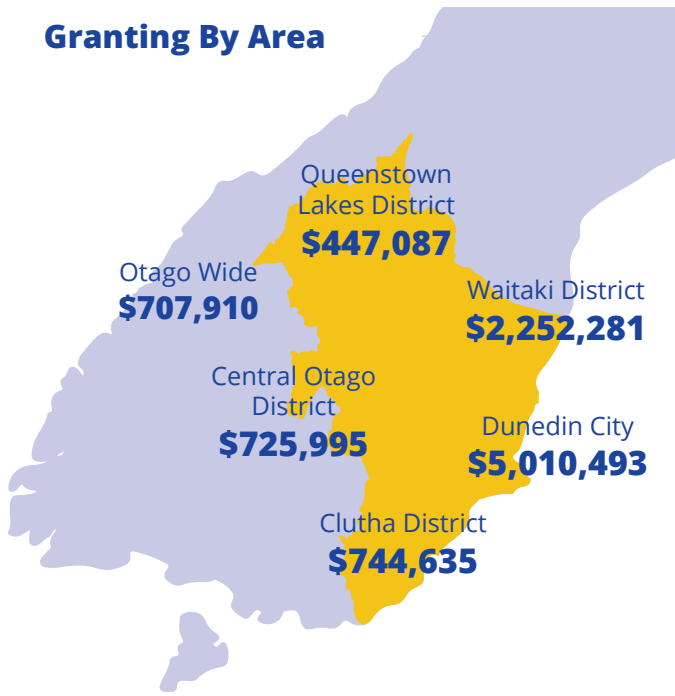
For further information on our funding priorities visit:

[www.oct.org.nz/about-us/our-strategic-plan](http://www.oct.org.nz/about-us/our-strategic-plan)

## Granting By Application Type (\$000)



## Granting By Area



## Proud to be South D – the South Dunedin Street Festival

**Amount Granted: \$11,800**

The South Dunedin Street Festival is a multicultural carnival that celebrates the vibrant, integrated, and resourceful community of South Dunedin. Lower King Edward Street is transformed into a lively showcase of local performers, artists, businesses, and community service organisations. With a focus on inclusion, accessibility, and low-cost entertainment, the festival encourages community participation with a wide variety of activities and events on offer.



# Tamariki & Rangatahi Strategy

Otago Community Trust announced the Tamariki & Rangatahi Strategy in April 2022, earmarking up to \$10 million over five years to fund initiatives aligning with the vision that all tamariki and rangatahi in Otago are valued, accepted and empowered to lead fulfilled lives where they are healthy, happy and their wellbeing is nurtured.

The strategy prioritises tamariki and rangatahi aged 0-24, aiming to increase social equity, promote participation and support rangatahi-led initiatives.

Three funds were developed to support organisations and initiatives seeking to uplift the region's young people:

- Impact for Tamariki and Rangatahi Fund
- Rangatahi-Led Fund
- Tamariki and Rangatahi Sector Capability Fund



## Impact for Tamariki and Rangatahi Fund

The Impact for Tamariki and Rangatahi Fund offers a small number of high investment grants for projects that aim to create multi-generational positive change for tamariki, rangatahi, and whānau. This fund emphasises building close relationships between the Trust and the Community-Partner recipient organisations to maximise the impact of the investments.

Two additional grants were approved this year:

1. Barnardos Aotearoa in collaboration with Milton Primary School and local service providers, received funding of \$454,631 over three years to support

the school's wider long-term Wellbeing Strategy. Specifically, the collaboration will deliver Barnardos' Leap social work service at Milton Primary School, with the flexibility to serve the wider community and other local schools over time.

2. The Wheako Project received \$644, 859. Spearheaded by the Greater Green Island Community Network Charitable Trust (GGICN), the project aims to holistically address the needs of tamariki and rangatahi in the Greater Green Island area by strengthening connections across four key domains: schools, community, whānau, and the establishment of an intentional community space.

## Te Hou Ora Whānau Services

Te Hou Ora Whānau Services (THOWS) is making strides in their transformational vision of 'whakamana ngā pā harakeke' - empowering whānau. Having secured a \$755,660 grant over three years from Otago Community Trust, they are now into the second year of implementing innovative, equitable, and Māori-centric multi-year programs. A dedicated project management team oversees program implementation, drawing on the organisation's expertise in evidence-based practices, whānau-centric service delivery, and mātauranga Māori methodologies.

A Kaupapa Māori organisation, they have been supporting the communities of Dunedin since 1976. Their comprehensive range of services aims to meet the needs of tamariki, rangatahi, and whānau by building resilience, enhancing early childhood learning, developing parenting skills and educating youth. At the core of their mission is the empowerment of tamariki, rangatahi and whānau to create positive opportunities for themselves while strengthening their cultural identity through the application of te reo Māori and tikanga practices. With a holistic approach rooted in Māori values and principles, THOWS strives to facilitate positive outcomes and well-being for whānau across generations.







In March, members of the Ōtepoti/ Dunedin rōpū got together to record a podcast talking about what the Rangatahi-Led Fund was all about, as well as tips and tricks for groups putting their funding applications together.

You can listen to the podcast by visiting our website.



## Rangatahi-led Fund

**“This fund is making a difference across Otago, particularly for young people, through a process of genuinely handing over power and supporting rōpū to make considered, values-driven funding decisions for their local communities”.**

From the Making a Difference report, commissioned by OCT in February 2024 following the fund's inaugural year. The report's purpose was to gain perspective on how successful the fund had been and provided insights into the thoughts and feelings of those rangatahi involved.

The Rangatahi-Led Fund launched in 2023 and is now in its second year of empowering youth leadership and innovation. This unique fund provides grants for youth-led projects that benefit young people, with funding recommendations made by rangatahi for rangatahi.

Four regional rōpū representing Ōtepoti/Dunedin, South Otago, North Otago, and Central Otago are at the helm, steering the fund's purpose and criteria. They collaborate with Otago Community Trust to make final funding decisions for grants up to \$5,000.

These grants support innovative youth-led initiatives administered by eligible organisations. The fund welcomes a diverse range of ideas - in its inaugural year, it supported projects spanning cultural awareness and development, all-ages events, and initiatives uplifting queer and gender-diverse rangatahi.

By placing rangatahi at the forefront of decision-making, the Rangatahi-Led Fund empowers young people to identify and address the needs and aspirations of their communities, fostering leadership skills and ensuring that funding aligns with the priorities of Otago's youth - there were 19 grants in 2023.



**A sincere and heartfelt mihi to all our rangatahi rōpū spearheading the progress of this kaupapa, and to the new crew who've jumped on board to help move things forward.**

### 2023 Rangatahi-Led Fund Rōpū members

#### North Otago

Blayde Forbes  
Oshyn Guthrie  
Sophia Sam  
Kika Tangifolau  
Katea Tangifolau  
Lesieli Halalele

#### Ōtepoti/Dunedin

Adeleah Nukanuka  
Arina Aizal  
Anahera Folimatama  
Meischarla Pinn  
Blake Armstrong  
Zoe McElrea  
Jordyn Kapita-Martin

#### South Otago

Alex Anderson  
Chaleece Kenealy  
Nancy Antill  
Paige King  
Tipene Wereta  
Jorja Andrews  
Shannon De Seymour  
Jorjah De Seymour

Brooke Barnett  
Soul George  
Cy Martin Smith  
Portia Chambers

#### Central Otago

Noah Moody  
James Avenell  
Morgan Calder  
Chloe Murray  
Jessie McNeil  
Chirlene Vorster  
Isabella Miscisco  
Tabitha Hildyard

# Climate Action

## Our Carbon Emissions

To create clear, measurable steps for mitigating our environmental impact, we have assessed the carbon emissions produced by Otago Community Trust's operational activities. This year, we have calculated our initial baseline CO2 footprint, in accordance with the international standard ISO14064-1:2018. This data will serve as a foundation for setting reduction targets and reporting on our progress in the future.

To assist with an organisation's understanding of its emissions, organisations can categorise their emissions according to Scopes 1, 2, and 3 as outlined in the Greenhouse Gas Protocol framework which can be found at:

[www.climateactionotearoa.co.nz](http://www.climateactionotearoa.co.nz)

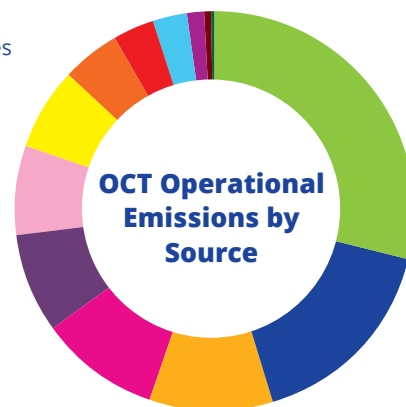
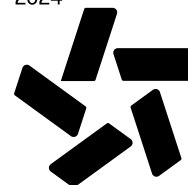
Otago Community Trust defines its carbon emissions as scope 1 and 2 emissions stemming from the Trust's operations. That essentially means the emissions directly generated by our core operational activities. At this stage, emissions from our grant making activity and investment portfolio are excluded from scope. We will be looking at ways to measure these emissions for future years.

The pie graph on the right breaks down the FY23/24 operational emissions by source as shown in the corresponding table. Note that because this is our baseline year, we have no prior data to compare this to yet.

tCO2e	Source
15.16	Investment Advisory Fees & Other Professional Services
8.61	Business Travel
5.29	Computer and Data Services
5.09	Staff Commute
4.10	Building Costs
3.87	Audit and Accounting Fees
3.50	Staff Performance and Recruitment Services
2.47	Fuel
1.77	Insurance
1.42	Purchased Energy
0.69	Waste
0.24	Water Supply and Waste Water Treatment
0.10	T&D Losses
0.04	Working from home

## CLIMATE ACTION

Carbon Measured 2024



Taiari Wai River Festival

## Taiari Wai River Festival

Amount Granted: \$4,300

The Taiari Wai River Festival is a community music festival focused on celebrating and raising awareness about the Taiari River's freshwater ecosystems. Held in the Central Otago village of Pātearoa, its core aim is to provide a gathering point for the Taiari river community to learn about and appreciate their river environment, raising the profile of freshwater conservation efforts.

While outwardly a music festival, its primary purpose is raising freshwater awareness, galvanising the community to protect this vital resource in a fun, family-friendly way. Fundamentally, the festival celebrates community, nature and the central role of water (wai) for the Taiari region.

## Next steps...

Otago Community Trust has adopted a Climate Action Plan which is available on our website. This sets out our planned activities and targets for 2024/2025. This includes developing a plan for reducing the Trust's emissions, and looking to broaden the scope of the emissions we can measure - and manage - in future.

# Our Community

## *Tō Mātou Hapori*

At the heart of a thriving community lies the collective effort of its rōpū (members). The following pages highlight just a few of the inspiring endeavours undertaken by people in the Otago region, and the impact they are making under our four pillars: Empowered Communities, Improved Health & Wellbeing, Increased Access to Opportunities, and Thriving Children & Young People.



### *Kāhu Youth Trust*

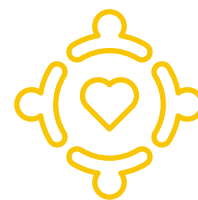
**Amount Granted: \$75,000**

Kāhu Youth Trust empowers young people in the Upper Clutha region to live their best lives! Their mission is to engage local rangatahi aged 11-24 through productive, educational and fun activities that build life skills, self-esteem and confidence while connecting them to the wider community.

Over the next few months, they will be able to provide an additional dynamic space tailored to diverse needs through a new Youth Centre fit-out. Designed in collaboration with local youth to ensure an inclusive environment, the bespoke facility will feature dedicated areas for activities, study, music, mentoring, games, quiet reflection, cooking, and collaboration. It will serve as a safe hub to empower Upper Clutha's rangatahi.

# Empowered Communities

## Hapori whaikaha



### Honouring the Year of the Dragon

#### Lawrence Chinese Camp Charitable Trust | \$2,000 | South Otago

The Lawrence Chinese Camp came alive on February 11th, 2024 to celebrate the Year of the Dragon for Chinese New Year. This historic settlement was established in 1867 during the Otago gold rush era - it was the first and largest Chinese goldmining community in New Zealand and holds great heritage and cultural significance.

Traditional Chinese music and dance performances took place, including the mesmerising Dunedin lion dancers. Guest speakers shared insights into Chinese traditions and the camp's unique history and guided tours allowed visitors to explore the heritage buildings and imagine life in this early multicultural community.

Lawrence Chinese Camp Trust was founded in 2004 by Dr James (Jim) Ng, its mission is to protect and promote this nationally important site. For the local Lawrence and greater Otago communities, the festival shares Chinese heritage while acknowledging the valued contributions of New Zealand's Chinese community.

It is with sadness that Otago Community Trust acknowledges the passing of Dr Ng in March this year. Our condolences go out to whānau and friends of Dr Ng - he was a visionary historian. As Chair of the Trust until 2018, his passion for preserving this important site means its rich history and cultural heritage will be appreciated for many generations to come.



Image: Lawrence Chinese Camp Charitable Trust

### Te Vaka Teaches Traditional Costume Making in Ōtepoti

#### Te Vaka Cook Islands of Dunedin Incorporated | \$10,895 | Greater Dunedin

The Cook Island community organisation Te Vaka has run a comprehensive series of workshops teaching local Cook Island youth in Dunedin the traditional skills and knowledge of making Cook Island costumes, known as ma'ani rakei ura.

The project aims to develop, grow, and pass down these important cultural practices to the next generation, ensuring they remain a vibrant and integral part of the community's identity

Since last year, Te Vaka has hosted around 13 in-depth workshops where experienced Cook Island crafts women guide the local children and youth, ranging from 5 to 18 years old, through every step of the intricate costume-making process. Participants learn traditional techniques for weaving, dyeing, designing, and assembling the costumes using authentic materials such as feathers, shells, and tree bark.

Passing on these traditional skills and knowledge to young people is crucial, especially here in Dunedin where access to these specialised materials can be limited. By teaching them to modify the costumes to

suit the colder climate, the community can ensure children can proudly perform and represent their heritage in Ōtepoti. Having already performed at many local events, like the beloved Moana Nui Festival in March this year, these workshops give them the opportunity to not only learn the intricate craft, but to then showcase their skills and cultural identity.



Image: Te Vaka Cook Islands of Dunedin

# Improved Health & Wellbeing

*Ka pakari ake te oraka*



## *Building Connections, Igniting Growth: Waitaki's state-of-the-art Community Event Centre*

**Waitaki Event Centre Trust | \$2,000,000 | North Otago**

In the heart of Waitaki, an exciting vision is taking shape – the development of the Network Waitaki Community Event Centre. This ambitious project aims to create a dynamic hub that will not only cater to the diverse recreational needs of the community, but also serve as a catalyst for economic growth and social wellbeing.

With the collective efforts of local stakeholders and supported by regional authorities, the new Network Waitaki Event Centre will boast six multi-purpose courts, catering to various sporting codes, cultural events, business gatherings, and non-profit organisations.

Beyond its physical infrastructure, the Network Waitaki Event Centre holds the promise of establishing Waitaki as a premier destination for regional and South Island tournaments.



Image: Network Waitaki Community Event Centre

The Event Centre will also serve as a vital educational hub. With no single school hall large enough to accommodate combined events, the Centre will allow schools in the area to come together for shared learning experiences. It will provide a spacious venue for Waitaki's burgeoning student population, fostering a sense of community among local schools and offering students opportunities to interact, collaborate, and participate in shared educational activities.

## *Boosting Emergency Response Capabilities in Central Otago*

**The Order of St John South Island Region Trust Board | \$51,541 | Central Otago**

Earlier this year, the Hato Hone St John Station in Alexandra welcomed the arrival of a brand new, state-of-the-art frontline emergency ambulance. This vital addition replaces an older model, marking a significant upgrade in the region's emergency response capabilities.

Ambulances are continually evolving to adapt to Aotearoa's unique conditions, increase operational efficiency, and improve patient care. This cutting-edge vehicle is designed to meet those challenges, equipping the St John teams with the necessary resources to deliver the highest quality, patient-focused emergency care to the people of Alexandra and the surrounding regions.

Operating around the clock, the Alexandra Ambulance Station is staffed by a dedicated crew of eight full-time personnel and twelve committed volunteers. The new ambulance will serve a vast 22-area response zone, encompassing Alexandra, Cromwell, Wānaka, Dunedin, and Roxburgh, ensuring that critical medical assistance is promptly available when needed most.

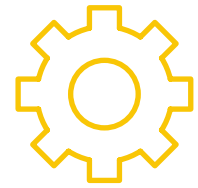
Over the past two years, the outgoing ambulance responded to an impressive 1,965 incidents, with a staggering 32% of those calls involving life-threatening or time-critical situations. This statistic underscores the vital role that emergency services play in safeguarding the well-being of the Central Otago community.



Image: Hato Hone St John

# Increased Access To Opportunities

*Ka nui ake te whai wāhi*



## *WoolOn: Reviving the Legacy of Wool*

**WoolOn Creative & Fashion Society Incorporated | \$10,000 | Central Otago**

In the heart of Central Otago, a movement is brewing to revive the rich legacy of wool. WoolOn, a community-based organisation, has taken up the mantle to promote the use of wool in fashion design and crafts, educate the public about its sustainability, and support local wool growers and producers.

WoolOn's flagship event, the annual runway show, showcases the versatility of wool in fashion, celebrating designers who have mastered the art of working with this natural fibre. It also provides a platform for up-and-coming New Zealand designers of all ages to showcase their talent and creativity.

Beyond the runway, WoolOn has expanded its reach by organising educational workshops, crafting sessions, and designer showcases. These events aim to inspire the community to embrace wool in their daily lives and appreciate the unique wool-growing environment of Central Otago.

As the demand for sustainable fashion and eco-friendly materials continues to grow, WoolOn's mission becomes increasingly relevant. By celebrating the beauty and versatility of wool, the organisation is paving the way for a more sustainable and locally sourced future in fashion.



## *Te Pūao – The Place Where the River Meets the Sea*

**Dunedin Writers & Readers Festival | \$20,000 | Greater Dunedin**



The Dunedin Writers and Readers Festival is a literary celebration at the confluence of stories – celebrating Te Pūao – the place where the river meets the sea.

Dunedin, a UNESCO City of Literature, has been a stronghold of indigenous storytelling in Te Waipounamu for generations. The latest festival marked a new chapter, recognising literary icons like Witi Ihimaera's 50 years as a published author and Katherine Mansfield's birth in 1888.

Over a weekend in October, the 6th biennial festival hosted over 30 events, panel discussions and workshops that included a dedicated kaupapa Māori stream - Toitū Tauraka Waka, the inaugural Curator Māori series.

With a focus on celebrating Aotearoa's talents, the program welcomed literary heroes, emerging voices, and artists at various career stages from Dunedin and across the motu. The festival aims to curate a strong sense of place and people, building connections and fostering conversations that reflect the beautiful convergence of voices, genres, and themes defining our ever-evolving world.

# Thriving Children & Young People

*Ka ora rawa atu ngā tamariki me ngā rangatahi*



## *More Room to Play: Te Kura O Take Kārara Expands Outdoor Learning*

**Te Kura O Take Kārara | \$15,000 | Queenstown Lakes**

Te Kura O Take Kārara has become a true hub for the Three Parks community in Wānaka since opening its doors in 2020. What started with just 78 students has rapidly grown to 319 children enrolled, with a capacity for 400 and expectations to reach that number within the next couple of years.

As the roll has expanded, so too has the need for additional outdoor learning and play spaces for tamariki to enjoy. Te Kura O Take Kārara has been embarking on developing its next phase of outdoor learning areas. The new spaces build upon the success of the existing playgrounds, providing more opportunities for Wānaka's approximately 9,000 residents to gather, connect, and instill the school's values of caring, courage, and community in the next generation.

The school understands the immense value of naturalistic playgrounds that encourage physical activity, problem-solving, and inclusion for all kids. The initial playground and pump track - which opened in 2022 - are designed with this in mind, and the next phase carries this on. Both are designed to be utilised by the wider community after school hours, weekends, and holidays.



Image: Estelle Moore

## *More Than Music: Jammers find their Groove and Confidence through StarJam*

**The StarJam Charitable Trust | \$5,500 | Greater Dunedin**

StarJam is lighting up the Dunedin community by empowering young people with disabilities through the power of music and performance. This vital program provides a unique safe space for 48 tamariki and rangatahi aged 6-25 to express themselves, get physically and socially active, and develop critical life skills.

Across 4 dynamic weekly workshops - Jazzy Jammers, Magic Movers, Rockin' Rhythm and Mosgiel Melody Makers - StarJam Dunedin nurtures confidence, creativity and meaningful connections for its "Jammers." With personalised guidance from skilled tutors and compassionate volunteers, participants can explore dance, rhythm and singing with no cost to families. Regular local performance opportunities allow the Jammers to showcase their talents to the community.

The impacts transcend the music, fostering a profound sense of belonging, purpose and pride for the Jammers and their whānau. They gain skills like teamwork, goal-setting and decision-making.

StarJam doesn't just transform young lives - it strengthens the entire Dunedin community. By celebrating abilities over disabilities and cultivating an inclusive environment, it creates a more accepting, connected world for all. As one local caregiver shared, "StarJam allows my child to just be themselves and have fun in Dunedin." A simple idea sparking powerful change.



Image: StarJam



Moana Nui Festival



Te Kura O Take Kārara, Image: Luca Cowan



Cromwell MenzShed



Kākā Point Surf Lifesaving



Journeys Charitable Trust, Image: Lisa Hill



Weston School, Waitaki



South Dunedin Art Trail



Harbour Street Jazz Festival, Image: Mark Stevens



Moana Nui Festival, Image: Marlia Morris



ID2024, Image: Seen in Dunedin



# Grants List

## Kā Takuhe

### Central Otago District

Alexandra and Districts Youth Trust	\$4,950
Alexandra Blossom Festival Inc	\$6,000
Alexandra Community House	\$40,000
Alexandra Elim Church Trust	\$180,000
Alexandra Musical Society Inc	\$8,000
Alexandra Primary School	\$3,460
Alexandra Senior Citizens Centre Inc	\$2,000
Bannockburn Bowling Club Inc	\$10,000
Blackstone Hill Cemetery Trust	\$1,000
Central Otago Bowls Inc	\$1,000
Central Otago District Council - Rural Travel Fund	\$7,025
Central Otago Heritage Trust	\$4,500
Central Otago Pony Club	\$7,000
Central Otago Regional Choir	\$2,500
Clyde Primary School	\$10,380
Cromwell Museum Trust	\$1,500
Cromwell Presbyterian Church	\$2,400
Cromwell Primary School	\$53,807
Cromwell Youth Trust	\$4,088
Dunstan High School	\$2,480
Flames Ice Hockey Club	\$2,000
Goldfields Primary School	\$1,225
Hawea Playgroup Incorporated	\$5,000
Journeys Charitable Trust	\$15,000
Mainland South BMX Assn Inc	\$16,250
Maniototo Area School	\$200
Maniototo Ice Rink Inc	\$30,000
Maniototo Lions Charitable Trust	\$4,000
NZ Curling Assn Inc	\$12,000
Old Cromwell Incorporated	\$15,000
Omakau Bowling Club	\$10,000
Poolburn School	\$2,930
Probus 14 Alexandra	\$1,000
REAP - Central Otago	\$10,000
Roxburgh Baptist Church	\$25,000
Roxburgh Entertainment Centre Improvements & Promotions Inc	\$10,000
Search and Rescue Dogs Avalanche Inc	\$6,500

Sticks n Stones Inc	\$50,000
Tarras Golf Club Incorporated	\$5,000
The Cromwell Menz Shed Charitable Trust	\$120,000
The Terrace School	\$2,000
Up-Cycles Charitable Trust	\$1,500
Upper Taieri Wai Incorporated	\$4,300
Uruuruwhenua Health Incorporated	\$15,000
WoolOn Creative & Fashion Society Incorporated	\$10,000

**Central Otago District Total \$725,995**

### Clutha District

Balclutha Gymnastics Club Inc	\$2,000
Balclutha Primary School	\$728
Balclutha Scout Group	\$9,500
Barnardos New Zealand	\$454,631
Blessed Box Charitable Trust	\$2,500
Catlins Medical Centre (2017) Ltd	\$2,275
CDC - Owaka Community Centre	\$6,390
Clinton Golf Club Inc	\$5,000
Clutha Community Hub Charitable Trust	\$5,000
Clutha District Council - Aspiring Leaders	\$2,000
Clutha District Council - Rural Travel Fund	\$10,000
Clutha Valley Presbyterian Church	\$5,000
Clutha Valley Primary School	\$850
Kaitangata Primary School	\$506
Kaka Point Surf Life Saving Club	\$5,000
Lawrence Bike Club Incorporated	\$25,000
Lawrence Chinese Camp Charitable Trust	\$2,000
Lawrence Golf Club Incorporated	\$10,000
Lawrence Heritage and Cultural Charitable Trust	\$110,000
Life Education Trust Heartland Otago Southland	\$15,110
Our Hut Heritage Hub	\$3,000
Owaka Lions Club Charitable Trust	\$25,000
Owaka Rugby Football Club	\$7,500
Rosebank Primary School	\$3,400
South Otago Agricultural & Pastoral Soc	\$2,200
St Marys School Milton	\$750
Taieri Mouth Amenities Soc	\$9,000

Taieri Mouth Multisport Event	\$1,000	Coptic Orthodox Church, New Zealand Parish of Archangel Michael, Dunedin	\$45,000
The Clutha Budget Advisory Service	\$2,615	Corstorphine Community Hub	\$10,000
Upper Clutha Rugby Football Club Inc	\$11,500	Disability Information Service Inc T/A Livingwell Disability Resource Centre	\$25,000
Waihola District School	\$900	Diving Ōtākou	\$2,150
Warepa School	\$4,280	Dunedin (NZ) Masters Games Trust	\$90,000
<b>Clutha District Total</b>	<b>\$744,635</b>	Dunedin Beekeepers Club	\$500
<b>Dunedin City</b>		Dunedin Brass Inc	\$25,000
Abbotsford School	\$30,662	Dunedin Choral Society	\$8,000
Able - Southern Families Support	\$63,000	Dunedin City Council - Aspiring Leaders	\$2,500
Acts of Kindness Charitable Trust	\$10,000	Dunedin City Council - General	\$5,000
ADL	\$23,669	Dunedin City Council - Puaka Matariki Celebrations	\$15,000
Age Concern Otago Inc	\$63,000	Dunedin Community House Trust Inc	\$4,942
Amputee Society of Otago & Southland Inc	\$500	Dunedin Community Mediation Assn Inc	\$2,160
Andersons Bay Community Kindergarten Inc	\$10,000	Dunedin Dream Brokerage, C/- Otago Polytechnic	\$8,648
Anglican Family Care	\$3,117	Dunedin Friend-Link Trust	\$5,000
Aroha Ki Te Tamariki	\$249,500	Dunedin Fringe Arts Trust	\$83,000
Arthur Street School	\$230	Dunedin Ice Skating Club Inc	\$12,500
Arts On Tour NZ	\$20,000	Dunedin Midwinter Celebrations Trust	\$20,000
Athletics Otago Inc	\$36,760	Dunedin Night Shelter Trust	\$100,000
Aukaha (1997) Ltd	\$5,000	Dunedin North Intermediate School	\$3,685
Balaclava School	\$9,200	Dunedin Pakistan Society Inc	\$3,000
Balmacewen Intermediate School	\$6,705	Dunedin Philippine Club Inc	\$2,245
Basketball Otago Inc	\$60,000	Dunedin Pride Inc	\$4,500
Bathgate Park School	\$2,583	Dunedin Repertory Soc Inc	\$2,500
Bayfield High School	\$1,710	Dunedin Returned Services Choir	\$875
Bayfield Park Community Sports Trust	\$2,500	Dunedin Rudolf Steiner School	\$650
Blue Oyster Arts Trust	\$10,100	Dunedin Senior Chinese Assn	\$2,000
Bradford Primary School	\$575	Dunedin Tai Chi Club Inc	\$3,840
Brockville School	\$27,530	Dunedin Tracks Network Trust	\$4,000
Carisbrook School	\$213,418	Dunedin Wildlife Trust	\$12,000
Castle Charitable Trust	\$4,600	Dunedin Workers Educational Assn Te Wāhi Ākoranga o Ōtepoti Inc	\$5,000
Catholic Social Services	\$63,000	Dunedin Young Farmers Club	\$2,000
Caversham Baptist Church	\$7,000	Dunedin Youth Jazz Orchestra	\$17,000
Caversham Harrier & Athletic Club Inc	\$15,000	Dunedin Youth Orchestra Inc	\$8,300
CCS Disability Action Otago Inc	\$17,500	East Otago Musical Theatre Inc	\$3,500
Chairpersons Fund	\$500	East Taieri Preschool	\$2,500
Citizens Advice Bureau - Dunedin	\$12,000	East Taieri School	\$2,500
City of Dunedin Pipe Band Inc	\$3,700		

Elmgrove School	\$1,755	New Zealand Rodeo Cowboys Association Incorporated	\$5,000
Fairfield School	\$2,487	NZ Chinese Heritage Research CT	\$3,000
Football South	\$65,300	OneCoast Incorporated	\$5,000
Golf Otago Inc	\$27,500	Otago Academy of Sport	\$35,000
Greater Green Island Community Network Charitable Trust	\$645,359	Otago Accommodation Trust	\$14,400
Green Island Junior Cricket Club	\$2,000	Otago Badminton Assn Inc	\$16,500
Green Island School	\$1,150	Otago Boys High School	\$3,734
Grow NZ Inc - Dunedin Grow Centre	\$500	Otago Cricket Assn Inc	\$135,500
Halfway Bush School	\$120	Otago Festival of the Arts Trust	\$195,000
He Waka Kotuia Trust	\$30,000	Otago Fish & Game Council	\$1,879
Hold On To Your Friends Inc	\$4,000	Otago Gang Show - Scout Assn of NZ	\$15,500
Hope Church Dunedin Incorporated	\$1,000	Otago Girls' High School	\$8,180
iD Dunedin Fashion Inc Soc	\$7,000	Otago Hockey Assn (1990) Inc	\$35,000
International Festival Environment Science Technology Dun NZ Inc	\$75,000	Otago Medical Research Foundation Inc	\$80,000
ISAPA (International Symposium for Adaptive Physical Activity) - Oceania 2023 Inc.	\$6,250	Otago Polytechnic - Pacific Island Scholarships	\$10,000
Islington Early Childhood Centre Incorporated	\$7,500	Otago Rowing Association Inc	\$30,000
Kaikorai Grays Sport & Travel Inc	\$2,000	Otago Rugby Football Union Inc	\$70,000
Kaikorai Kindergarten	\$3,000	Otago Rugby League Inc	\$25,000
Kaikorai Primary School	\$680	Otago Secondary Schools Sports Assn	\$31,000
Kaikorai Valley College	\$2,861	Otago Society for Music Education, operating as Music Education Otago	\$2,000
Karitane Bowling Club Inc	\$3,000	Otago Sports Car Club Inc	\$17,500
Karitane School	\$150	Otago Table Tennis Assn Inc	\$5,000
Kings High School	\$2,800	Otago Touch Assn Inc	\$45,000
Kingslea School - Puketai	\$7,252	Otago University - Marine Studies Centre	\$20,000
Ko Ngā Rourou Manaaki (Baskets of Hospitality)	\$1,000	Otago Youth Wellness Trust	\$10,000
Liberton Christian School	\$800	Otepoti Vikings Volleyball Club	\$3,250
Life Education Trust Coastal Otago	\$15,000	OurSight	\$1,000
Life Matters Suicide Prevention Trust	\$1,500	Outram School	\$340
Logan Park High School	\$10,100	Pacific Trust Otago	\$30,000
Long Beach Amenities Society Inc	\$9,000	Pakistan Association of Otago Inc	\$2,500
Macandrew Bay School	\$780	Parafed Otago	\$30,000
Māori and Pasifika Education Trust	\$10,000	Parent to Parent - Otago Branch	\$5,000
Māori Hill School	\$370	Port Chalmers School	\$625
Maungatua Presbyterian Church	\$25,000	Port Chalmers Seafood Festival Incorporated	\$15,000
Metonymic Trust	\$2,300	Pregnancy Help Inc Dunedin Branch	\$8,000
Middlemarch Swimming Club Soc Inc	\$20,000	Presbyterian Support Otago	\$9,833
Mornington School	\$600	Progress of Waikouaiti Area	\$8,000
Mosgiel Piping and Dancing Society	\$1,308	Prospect Park Productions NZ	\$9,920
Mosgiel Scout Group	\$5,000	Punga Croquet Club Inc	\$4,000

Purakaunui School	\$500	Te Hou Ora Ōtepoti Inc	\$80,000
Queens High School	\$6,970	Te Hou Ora Whānau Services Limited	\$8,000
Ravensbourne Youth Yachting Trust	\$18,500	Te Kāika	\$307,000
Royal New Zealand Plunket Trust	\$17,173	Te Kura Kaupapa Māori o Ōtepoti	\$34,000
Sacred Heart School	\$870	Te Mana Ahua Ake Charitable Trust	\$50,000
Saddle Hill Foundation Trust	\$35,000	Te Vaka Cook Islands of Dunedin Incorporated	\$10,895
Saddle View Scouts	\$18,000	Te Whanau Arohanui Trust	\$65,000
Sailability Otago Trust	\$15,000	Tennis Otago Inc	\$40,000
Santa Parade Trust	\$15,000	The Dunedin Writers and Readers Festival Trust	\$20,000
Save the Otago Peninsula (STOP) Society Inc	\$20,000	The Opera House Trust	\$2,545
Sawyers Bay School	\$300	The Piping and Dancing Association of New Zealand Inc - Otago Centre	\$4,025
Servants Health Centre Trust	\$8,200	The Port Chalmers Foundry Society	\$3,000
Silver Peaks Country Music Club Inc	\$2,200	The StarJam Charitable Trust	\$5,500
Silverstream South Primary School	\$8,000	The Work Opportunities Trust	\$4,800
Skeggs Foundation	\$45,650	Transition to Work Trust	\$3,000
South Dunedin Community Network Inc	\$11,800	Trinity Catholic College	\$2,785
Southern Heritage Trust	\$7,500	U3A Dunedin Charitable Trust	\$1,000
Southern Youth Development	\$90,000	Village Agrarians Charitable Trust	\$3,726
Sport Otago	\$175,750	Volleyball Otago	\$15,000
Sporting Chance c/- Sport Otago	\$30,000	Volunteer South/ Kaituao o te Taitonga	\$11,580
Squash Otago Inc	\$24,750	Waikouaiti Bowling Club Inc	\$2,000
St Bernadettes School	\$600	Waikouaiti Golf Club Inc.	\$6,600
St Clair Golf Club Inc	\$5,000	Waikouaiti School	\$42,000
St Clair School	\$880	Waikouaiti Volunteer Fire Brigade	\$7,000
St Marys School - Mosgiel	\$660	Waitati School	\$3,050
St Marys School Kaikorai	\$200	Wakari Cub & Scout Group - Scout Assn of NZ	\$4,500
St Peter Chanel School	\$2,764	Wakari School	\$285
Stage South Charitable Trust	\$22,000	Warrington Primary School	\$950
Startup Dunedin	\$2,000	West Harbour Arts Charitable Trust	\$2,500
Stopping Violence Dunedin Inc	\$30,000	West Taieri District Memorial Hall Society Inc	\$5,000
Straight Up Trust	\$40,000	Youthline Otago Inc	\$50,000
Strath Taieri Agriculture and Pastoral Society Incorporated	\$5,000	YSAR Trust	\$16,500
SuperGrans Dunedin Charitable Trust	\$10,000	Zone 5 - Musical Theatre NZ Inc.	\$2,214
Swimming Otago	\$5,000	<b>Dunedin City Total</b>	<b>\$5,010,493</b>
Swing Riot Dunedin Inc	\$2,000	<b>Otago Wide</b>	
Tahuna Normal Intermediate School	\$21,765	Anxiety New Zealand Trust	\$3,000
Taieri College	\$5,055	Aphasia New Zealand (AphasiaNZ) Charitable Trust	\$3,000
Taieri Dramatic Society Inc	\$8,000	BandQuest Charitable Trust	\$5,000
Taieri Historical Society Inc	\$9,500		
Taieri Musical Society Inc	\$8,000		
Tainui School	\$814		

Blue Light Ventures Inc	\$1,750
Canterbury Speed Skating CAISC	\$1,000
Choirs Aotearoa NZ Trust	\$7,200
Community Employment	\$29,010
Dance Therapy NZ	\$2,000
Eduk8 Otago	\$9,000
EECA (Energy Efficiency and Conservation Authority)	\$350,000
Gymnastics New Zealand	\$7,000
Hauora Taiwhenua Rural Health Network	\$7,500
InsideOUT Kōaro	\$2,500
Kiwi Family Trust	\$3,250
Netball South Zone Inc	\$56,000
New Zealand Endometriosis Foundation Charitable Trust	\$2,000
NZ Family & Foster Care Federation Inc (Caring Families Aotearoa)	\$1,500
NZ Special Olympics Lower South Island Regional Council	\$10,000
Presbyterian Support Northern T/A Lifeline	\$10,000
Read NZ Te Pou Muramura Inc	\$5,000
Road Safety Education Limited	\$8,500
Rockquest Charitable Trust	\$7,000
Ronald McDonald House Charities NZ	\$2,400
Royal New Zealand Ballet	\$7,000
Salvation Army New Zealand	\$45,000
Show Me Shorts Film Festival Trust	\$3,000
Special Olympics New Zealand	\$20,000
Storytime Foundation	\$4,300
Stroke Foundation of NZ	\$25,000
Surf Life Saving New Zealand Inc	\$18,000
Surfing for Farmers Charitable Trust	\$1,500
TalkLink Trust	\$3,000
Tangata Whenua Community and Voluntary Sector Research Centre Inc	\$8,000
Te Whānau Tupu Ngātahi o Aotearoa - Playcentre Aotearoa	\$10,000
The Boys' Brigade in NZ Inc	\$15,000
The CanInspire Charitable Trust	\$2,500
Wayne Francis Charitable Trust	\$10,000
Young Workers Resource Centre Inc	\$2,000
<b>Otago Wide Total</b>	<b>\$707,910</b>

<b>Queenstown-Lakes District</b>	
Alpine Community Development Trust	\$20,000
Aspiring Athletes Club Inc	\$1,500
Central Otago Hockey Assn	\$15,000
Challenge Wanaka Sports Trust	\$10,500
Disc Golf Wanaka Inc	\$8,600
Kahu Youth Trust	\$89,664
Lake Hawea Community Centre Inc	\$7,000
Mint Charitable Trust	\$12,750
Mt Aspiring College	\$3,120
One New Zealand	\$25,000
QLDC - New Year's Eve Celebration (ex Summerdaze)	\$5,000
QLDC - Rural Travel Fund	\$4,750
Queenstown Lakes District Council	\$1,323
Snow Sports NZ Inc	\$40,000
Southern Lakes Arts Festival Trust	\$4,862
Te Kura O Take Kārara	\$15,000
The Order of St John South Island Region Trust Board	\$51,541
Tititea Performing Arts Trust	\$2,000
Upper Clutha Radio Telephone Users Assn Inc	\$15,000
Upper Clutha Tracks Trust	\$30,000
WAI Wānaka	\$20,000
Wanaka Arts Society	\$3,000
Wanaka Community Workshop Trust	\$5,000
Wanaka Musicians Incorporated	\$5,000
Wanaka Primary School	\$1,477
Wānaka Search and Rescue Inc	\$15,000
Wanaka Wastebusters	\$5,000
Warbirds Over Wānaka Community Trust	\$10,000
Winter Games NZ Charitable Trust	\$20,000
<b>Queenstown-Lakes District Total</b>	<b>\$447,087</b>

<b>Waitaki District</b>	
Ardgowan School	\$50,240
Ardleigh Golf Club Inc	\$2,500
CCS Disability Action Waitaki Inc	\$9,000
East Otago High School	\$1,310
Excelsior Rugby and Associated Sports Club	\$500
Five Forks School	\$2,500
Harbour Street Jazz Inc	\$15,500

Janet Frame Eden Street Trust	\$3,500
Kakanui School	\$1,975
Loved4Life	\$1,000
Lower Waitaki Golf Club Inc	\$3,500
Mountain Biking North Otago Inc	\$5,000
North Otago Art Society Inc	\$5,000
North Otago Cricket Assn Inc	\$3,800
North Otago Rugby Football Union Inc	\$22,000
North Otago Scout Zone	\$7,500
North Otago Sports Bodies Assn Inc	\$1,500
North Otago Youth Support Group	\$4,000
Oamaru Assembly of God	\$5,000
Oamaru Combined Churches Christmas Parcels Trust	\$2,000
Oamaru Elim Church Trust	\$7,000
Oamaru Intermediate School	\$1,760
Oamaru Opera House Charitable Trust	\$8,000
Oamaru Poultry Pigeon & Canary Society	\$600
Oamaru Victorian Heritage Celebrations	\$8,000
Orwell Street Gospel Chapel Oamaru	\$2,000
Palmerston Primary School	\$27,810
St Josephs School - Oamaru	\$910
Steampunk NZ Trust	\$8,000
Te Whare Koa Charitable Trust	\$5,000
Union Cricket Club (Oamaru) Inc	\$2,000
Waitaki Boys High School	\$1,530
Waitaki District Council - Aspiring Leaders	\$2,209
Waitaki District Council - Community Events	\$10,000
Waitaki District Council - Rural Travel Fund	\$10,000
Waitaki Event Centre Trust	\$2,000,000
Waitaki Girls High School	\$137
Waitaki Menzshed	\$1,500
Waitaki Summer Music Camp	\$2,500
Waitaki Tongan Community Trust	\$4,000
Weston School	\$2,000
<b>Waitaki District Total</b>	<b>\$2,252,281</b>
<b>Total Grants Approved 2023/24</b>	<b>\$9,888,401</b>
Less Grant WriteBacks	\$186,587
DCC Arts Capability Reimbursement	\$19,244
	<b>\$9,682,570</b>



# Financials

## Rauemi Pūroko Ahumoni

### Summary consolidated statement of service performance

For the year ended 31 March 2024

#### Who Are We?

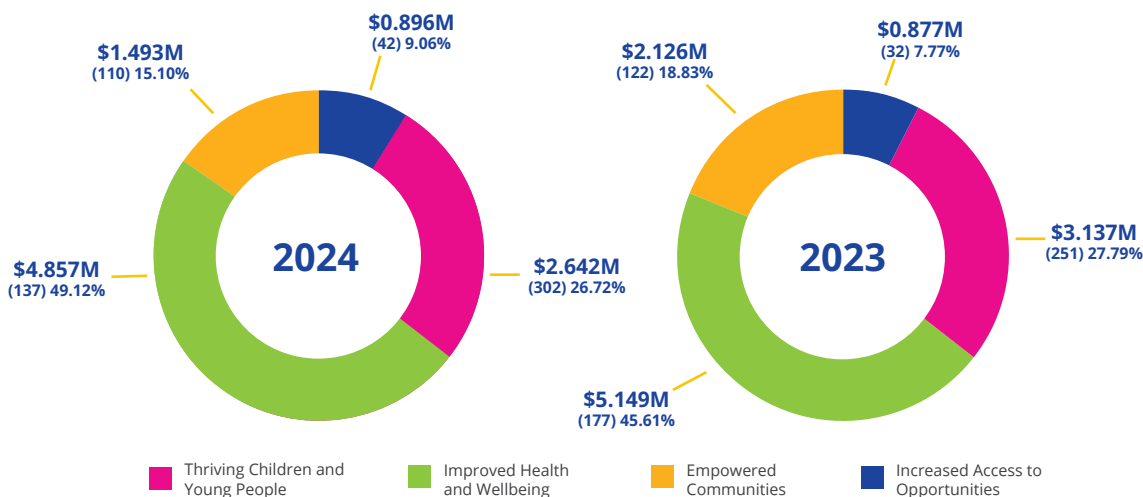
The Otago Community Trust is a philanthropic organisation which applies its Trust funds for charitable and other purposes which are of benefit to the Otago community.

The Otago Community Trust has its origins in the Dunedin Savings Bank, established in 1864 by public spirited citizens seeking to encourage thrift within the community, and distribute surplus profits to charitable causes.

The Otago Community Trust aims to make wise investment decisions that preserve the original capital for future generations as well as having a significant grants budget each year.

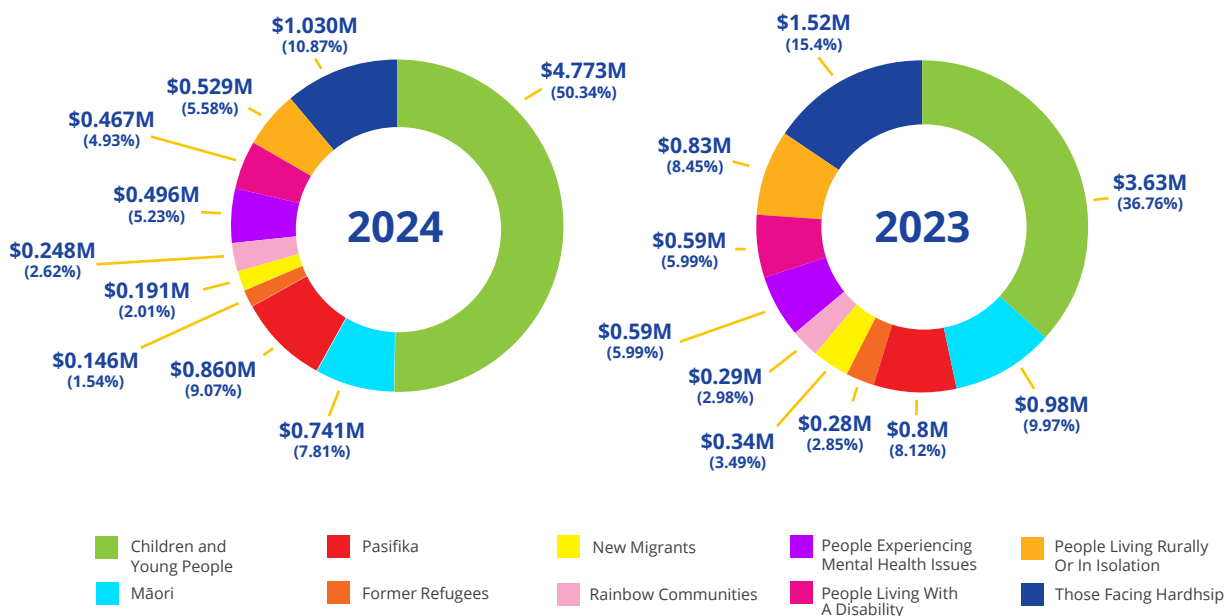
#### Funding

In 2024 we approved 591 grants totalling \$9.89 million (2023: 582 grants totalling \$11.29 million). Funding was allocated to groups who aligned to our funding pillars, as follows:



#### How Have We Performed?

96% of grants supported priority communities, those most vulnerable:



**A list of all organisations funded during the year is available on the Trust's website.**

In preparing the non-financial information presented in the Statement of Service Performance the Trustees in conjunction with management have sought to highlight several areas of importance and new initiatives which we consider to be of interest to our community. In doing so we acknowledge it is not possible to provide information on all our outcomes but have sought to provide information which we have considered relevant to reflect our overall results and significant outcomes for the year. During the coming financial year we plan to explore new measures for our organisational effectiveness activities, and ways to communicate these to the community in future.

**Otago Community Trust Directory**

For the year ended 31 March 2024

**Trustees**

Andrew Kilsby (Chairperson from May 2023)	Cromwell
Carole Adair (Appointed September 2023)	Dunedin
Alofa Lale	Dunedin
Barbara Long	Dunedin
Fraser McKenzie (Appointed September 2023)	Dunedin
Robyn McLean (Appointed September 2023)	Dunedin
Tuari Potiki (Resigned August 2023)	Dunedin
Diccon Sim (Resigned August 2023)	Dunedin
Michael Stevens	Dunedin
Bridget Tweed	Waitahuna
Raewyn van Gool	Cromwell
Haley van Leeuwen (Resigned March 2024)	Dunedin
Rebecca Williams	Cromwell
Malcolm Wong (Resigned August 2023)	Dunedin

**Chief Executive**

Jemma Adams

**Registered Office**

2nd Floor, Community Trust House  
Corner of Filleul Street & Moray Place, Dunedin

**Auditor**

Deloitte Limited  
Dunedin

**Solicitor**

Anderson Lloyd  
Dunedin

**Investment Advisor**

Mercer NZ Limited  
Auckland

**Bankers**

Westpac Banking Corporation  
Dunedin

**Accountant**

Findex NZ Limited  
Dunedin

**Summary consolidated statement of comprehensive revenue and expense**

For the year ended 31 March 2024  
in New Zealand Dollars (\$000's)

	2024	2023
Gains/(losses) from investments	34,411	(11,298)
Expenditure	(1,214)	(1,373)
<b>Surplus / (Deficit) before grants</b>	<b>33,197</b>	<b>(12,671)</b>
Grants approved during the year	(9,683)	(11,082)
<b>Surplus / (Deficit) before taxation</b>	<b>23,514</b>	<b>(23,753)</b>
Income tax (expense)/refund	-	-
<b>Surplus / (Deficit) for the year</b>	<b>23,514</b>	<b>(23,753)</b>
Other comprehensive revenue and expenses	-	-
<b>Total comprehensive revenue and expenses for the year</b>	<b>23,514</b>	<b>(23,753)</b>

**Summary consolidated statement of changes in trust funds**

For the year ended 31 March 2024  
in New Zealand Dollars (\$000's)

	2024	2023
Total trust funds at the beginning of the year	284,853	308,606
Plus total comprehensive revenue and expenses for the year	23,514	(23,753)
<b>Total trust funds at the end of the year</b>	<b>308,367</b>	<b>284,853</b>

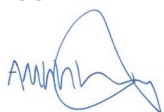


## Summary consolidated statement of financial position

As at 31 March 2024  
in New Zealand Dollars (\$'000's)

Assets	2024	2023
Cash and cash equivalents	438	701
Other current assets	61	66
<b>Total current assets</b>	<b>499</b>	<b>767</b>
Other investments	313,557	289,311
Property, plant and equipment	1,399	1,435
<b>Total non-current assets</b>	<b>314,956</b>	<b>290,746</b>
<b>Total assets</b>	<b>315,455</b>	<b>291,513</b>
<b>Liabilities</b>		
Trade and other payables (including grants)	6,625	5,782
<b>Total current liabilities</b>	<b>6,625</b>	<b>5,782</b>
Trade and other payables (including grants)	463	878
<b>Total non-current liabilities</b>	<b>463</b>	<b>878</b>
<b>Total liabilities</b>	<b>7,088</b>	<b>6,660</b>
<b>Net assets / Trust Funds</b>	<b>308,367</b>	<b>284,853</b>

### Approved on behalf of the Trustees



Andrew Kilsby  
Chairperson  
30 July 2024



Carole Adair  
Trustee  
30 July 2024

## Summary consolidated statement of cash flows

For the year ended 31 March 2024  
in New Zealand Dollars (\$'000's)

	2024	2023
Net cash outflow from operating activities	(10,262)	(14,167)
Net Cash from/(used) in investing activities	9,999	13,985
Net cash from/(used) in financing activities	-	-
Net (decrease)/increase in cash and cash equivalents	(263)	(182)
Cash and cash equivalents at 1 April	701	883
<b>Cash and cash equivalents at 31 March</b>	<b>438</b>	<b>701</b>

## Notes to the summary consolidated financial statements

For the year ended 31 March 2024

These are the summary consolidated financial statements of Otago Community Trust (the "Trust") for the year ended 31 March 2024.

The specific disclosures included in these summary consolidated financial statements have been extracted from the full annual consolidated financial statements dated 30 July 2024. The full annual consolidated financial statements were approved for issue by the Trustees on 30 July 2024 and have been prepared in accordance with Tier 2 Public Benefit Entity (PBE) Financial Reporting Standards as issued by the New Zealand External Reporting Board (XRB). They comply with New Zealand Equivalents to International Public Sector Accounting Standards Reduced Disclosure Regime (NZ IPSAS with RDR) and other applicable Financial Reporting Standards as appropriate to Public Benefit Entities.

An unmodified audit opinion has been received on the full consolidated financial statements for the year ended 31 March 2024. A copy of the full Trust consolidated financial statements for the year ended 31 March 2024 may be obtained by contacting the Trust on (03) 479 0994, or by visiting [www.oct.org.nz](http://www.oct.org.nz).

This summary financial report cannot be expected to provide as complete an understanding as provided by the full consolidated financial statements of the Trust.

This summary financial report has been examined by our auditor for consistency with the full consolidated financial statements. An unqualified audit opinion has been received. These summary consolidated financial statements were approved for issue by the Trustees on 30 July 2024.

### Basis of preparation

Otago Community Trust is a public benefit entity and was incorporated as a Charitable Trust in accordance with the provisions of the Community Trusts Act 1999.

These are the summary consolidated financial statements of Otago Community Trust and its wholly owned subsidiary Fillmor House Limited and they comply with PBE FRS 43: Summary Financial Statements. The presentation currency is New Zealand dollars, rounded to the nearest thousand dollars.

The full consolidated financial statements upon which these Summary Financial Statements are based, have been prepared to comply with the Accounting Standards Framework for Public Benefit Entities and the Financial Reporting Act 2013.

Notes to the summary consolidated financial statements continued...

### Specific accounting policies

All specific accounting policies have been applied on the same bases as those used in the full consolidated financial statements of the Trust.

### Changes in accounting policies

The Group adopted all mandatory new or amended accounting standards interpretation during the year. None had a significant impact on the financial statements.

### Income tax

The Trust's 100% owned subsidiary Fillmor House Limited obtained charitable status on 31 March 2017, income derived from this date forward is exempt from income tax.

### Events after the reporting period

No events have occurred subsequent to year end that significantly affect the operations of the Trust (2023: Appointment of Mercer NZ Limited as investment consultant).

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# Deloitte.

## Independent Auditor's Report on the Summary Consolidated Financial Statements

To the Trustees of Otago Community Trust

### Opinion

The summary general purpose consolidated financial report of Otago Community Trust (the 'entity' comprises the summary consolidated financial statements on pages 24 to 26 and 17 to 22 and the summary consolidated statement of service performance on pages 23 to 24. The complete set of summary consolidated financial statements comprises the summary consolidated statement of financial position as at 31 March 2024, and the summary consolidated statement of comprehensive revenue and expense, summary statement of changes in net funds and summary cash flow statement for the year then ended, and related notes. The summary consolidated financial report is derived from the audited general purpose financial report of the Group for the year ended 31 March 2024. In our opinion, the accompanying summary consolidated financial report, on pages 23 to 26 and 17 to 22, is consistent, in all material respects, with the audited general purpose financial report, in accordance with PBE FRS 43: Summary Financial Statements issued by the New Zealand Accounting Standards Board.

### Summary general purpose consolidated financial report

The summary consolidated financial report does not contain all the disclosures required by Public Benefit Entity Standards Reduced Disclosure Regime. Reading the summary consolidated financial report and the auditor's report thereon, therefore, is not a substitute for reading the audited general purpose consolidated financial report and the auditor's report.

### The audited general purpose consolidated financial report and our report thereon

We expressed an unmodified audit opinion on the audited general purpose consolidated financial report in our report dated 30 July 2024.

### Trustees responsibilities for the summary consolidated financial report

The Trustees are responsible on behalf of the entity for the preparation of the summary consolidated financial report in accordance with PBE FRS 43: Summary Financial Statements.

### Auditor's responsibilities

Our responsibility is to express an opinion on whether the summary consolidated financial report is consistent, in all material respects, with the audited general purpose consolidated financial report based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) 810 (Revised): Engagements to Report on Summary Financial Statements ('ISA (NZ) 810').

Other than in our capacity as auditor, we have no relationship with or interests in the entity.

### Restriction on use

This report is made solely to the Trustees, as a body, in accordance with Section 15(e) of the Trust Deed. Our audit has been undertaken so that we might state to the Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

*Deloitte Limited*

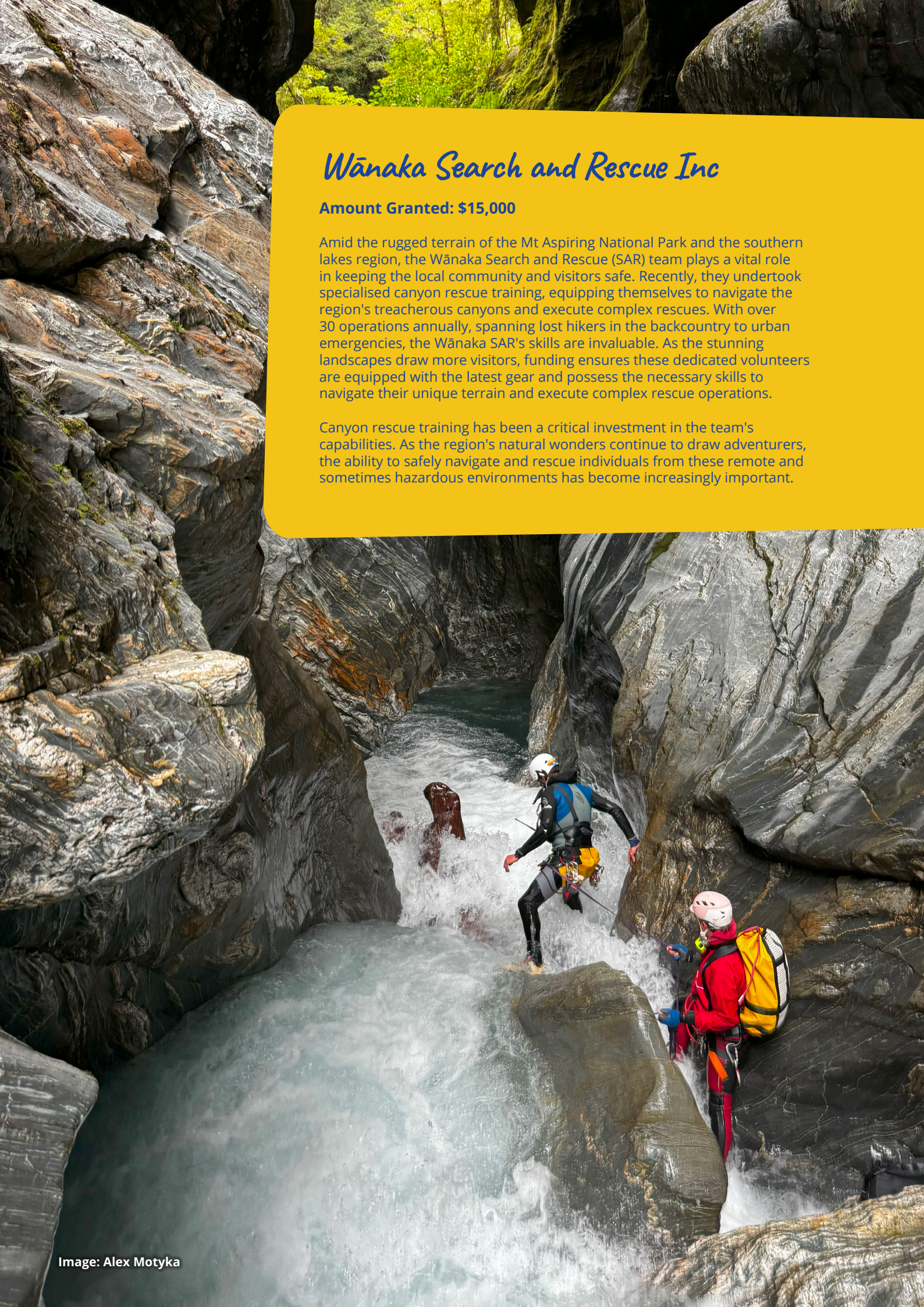
**Dunedin, New Zealand  
30 July 2024**

## *Wānaka Search and Rescue Inc*

**Amount Granted: \$15,000**

Amid the rugged terrain of the Mt Aspiring National Park and the southern lakes region, the Wānaka Search and Rescue (SAR) team plays a vital role in keeping the local community and visitors safe. Recently, they undertook specialised canyon rescue training, equipping themselves to navigate the region's treacherous canyons and execute complex rescues. With over 30 operations annually, spanning lost hikers in the backcountry to urban emergencies, the Wānaka SAR's skills are invaluable. As the stunning landscapes draw more visitors, funding ensures these dedicated volunteers are equipped with the latest gear and possess the necessary skills to navigate their unique terrain and execute complex rescue operations.

Canyon rescue training has been a critical investment in the team's capabilities. As the region's natural wonders continue to draw adventurers, the ability to safely navigate and rescue individuals from these remote and sometimes hazardous environments has become increasingly important.



## *Pou Whenua Installation*

### **Balmacewen Intermediate School | \$6,200**

To celebrate Matariki and as a physical representation of their revised school House names, Balmacewen Intermediate School installed four carved Pou Whenua, with help from Otago Community Trust. The pou, carved by renowned artist Alex Whitaker, represent four important places in the community - **Whakaari**, representing the ridge that sits below Whānaupaki (the area now known as Wakari). **Whānaupaki** - commonly known as Flagstaff. **Āraiteuru**, to represent the connection to the marae, and **Kaikārae**, the original name for the Kaikorai awa (river). The 2-metre tall macrocarpa posts are positioned prominently at the entrance to the school, they recognise mana whenua and Te Tiriti o Waitangi. This community resource builds knowledge of the area's rich heritage, fostering understanding and pride in the school's bicultural identity.

#### **Connect with us**

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