



OTAGO
Community Trust

**ANNUAL
REPORT**
Rīpoata-ā-Tau
2022 – 2023



Clutha Gold Trail Extension

The 62km extension of the Clutha Gold Trail is set to open in August 2023, connecting existing trails in Central Otago and Clutha. It establishes a continuous cycle path to Waihola, including previously inaccessible areas in the Lawrence, Waitahuna, Milton and the edges of Lake Waihola. Otago Community Trust has invested \$1 million into the trail extension, viewing it as a valuable opportunity for economic and social development in the small rural towns of South Otago.

Photo Courtesy of Will Nelson.



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Chair Report 2023

Tēnā koutou, tēna koutou, tēna koutou katoa.

Welcome to Otago Community Trust's Annual Report for the 2023 financial year. Over the last year, we have been delighted to be able once again to provide significant support to our region's community organisations. We have increased our focus on strategic philanthropy aimed at making a lasting impact and are proud of our progress in that regard, and of the progress we feel we have made in strengthening important community relationships.

Our Granting

Despite market volatility, the healthy state of reserves gave Trustees confidence to maintain a grants budget in line with recent years; we were pleased to approve \$11.3 million in grants for the year ending 31 March 2023, supporting 420 community groups around Otago.

A highlight has been the launch of our Tamariki and Rangatahi Impact Fund with its focus on genuine impact for tamariki and rangatahi across Otago and a goal of delivering long-term intergenerational change. Investments through this fund have exceeded \$1.4 million, with two significant grants made to He Ao Hou i Ōtepoti ki te Raki Charitable Trust (\$690,000) and Te Hou Ora Ōtepoti Inc (\$755,660), both of which deliver programmes supporting a number of our priority community groups.

Our Investment Position

The Trust's investment portfolio experienced a difficult year, leading to an overall return of -2.5%. As of 31 March 2023, the funds stood at \$284.9 million. It has been disappointing to see the overall value of the fund decline, especially considering the Trust's commendable track record of achieving an average investment return of 6.4% over the past decade. Prudence has led us to plan for a modest reduction in general granting over the coming year.

Changes at the Trust

We have had several personnel changes over the year. In September 2022, we farewelled North Otago based trustee Kevin Malcolm and subsequently, Tuari Potiki has joined the board. Our sincere thanks to Kevin and a warm welcome to Tuari.

Our Chief Executive, Barbara Bridger, resigned from the Trust in January to take up the equivalent role at the Central Lakes Trust. Over eight years in the role, Barbara made a significant contribution to the Trust's work and we thank her for her dedicated service to

the Trust and the community. Other staff changes have included the departure of Teresa Christie, Office Administrator, and Mel McAtamney, Marketing and Communications Coordinator from the team. We have now warmly welcomed Tash Howie as our new Office Administrator.

After a process attracting a very strong field of candidates, the Trust has been delighted to appoint Jemma Adams as its new Chief Executive. We greatly look forward to Jemma's leadership which we are confident will enable excellence in all we do for our communities into the future.

As part of governance practice, the Trust undertook a review of its investment consultancy arrangements during 2022 and, following an RFP process, identified Wealth and Investment specialist Mercer as best placed to support the Trust achieve its investment goals over the next period. The review and RFP process were undertaken with the assistance of financial adviser Ed Shuck of Fidato Advisory, whom we thank, and from whom the Trust will continue to receive independent investment advice.

It is appropriate that we acknowledge and thank outgoing consultant, Russell Investments, for their longstanding service to the Trust and for the important role they have played in assisting successive groups of Trustees to grow the Trust's capital base while at the same time providing generous grants to the community.

In Closing

In accordance with an indication I gave when reappointed Chair last year, I did not seek to continue as Chair in 2023 and was delighted when Andy Kilsby was elected unopposed at our April meeting. I was equally delighted that Barb Long, who has provided me superb support as Deputy Chair, was re-elected again unopposed. The Trust is in very safe hands with Andy and Barb in those roles.

I also wish to thank all of my fellow Trustees for all the support they have each afforded me during my time as Chair and for all the work they do for the Trust, and the outstanding commitment they have to our region.

Finally, I acknowledge and thank all of the Otago Community Trust staff. Our staff are the heart and soul of the Trust and do an outstanding job overseeing our community engagement and our granting and, generally, as champions for the impact we are in the fortunate position of being able to make.

**Ngā mihi nui,
Diccon Sim**
Chairperson



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. The 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.



Diccon Sim
Chair / Greater
Dunedin



Barb Long
Deputy Chair /
Greater Dunedin



Raewyn van Gool
Central Otago



Andy Kilsby
Central Otago



Alofa Lale
Greater Dunedin



Tuari Potiki
Greater Dunedin



Dr Michael Stevens
Greater Dunedin



Bridget Tweed
South Otago



Haley van Leeuwen
Greater Dunedin



Malcolm Wong
Greater Dunedin



Rebecca Williams
Central Otago

Our Kaupapa | Ō Mātou Rautaki

Otago Community Trust introduced a new strategic plan from 1 April 2022. Our strategic plan has been developed in careful consideration of the current economic environment; it is mindful that we are a Trust in perpetuity and that we need to be wise and prudent in our philanthropic decisions.

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.

Our Drivers

To achieve our vision, we will:



Funding

Empower communities to realise their potential and goals.



Asset Management

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.

Funders Commitment To Climate Action

Our Climate Action | Ngā Mahi Ahuarangi

Otago Community Trust, along with other Community Trusts and several other philanthropic funders in New Zealand recognise that the growing climate emergency is a grave risk to our communities and planet. The scale of the climate threat and solutions needed reflect this critical issue facing every community.

As a community funder whose assets are held for community good, the way we operate, how we invest our portfolio, and exploring how funding can be used to promote climate resilient communities are important issues for us.

Like many other Community Trusts and philanthropic funders, we are just beginning our climate action journey. We are pleased to have signed the Aotearoa Funders Commitment on Climate Action, which resolves our willingness to act collectively.

This commitment is the result of the formation of a Climate Action Working Group established by the Community Trusts' Chief Executives with support from The Centre for Social Impact in 2021.

The seven-part commitment is guided by Te Tiriti o Waitangi and mātaurangi Māori aspirations. It focuses on an equitable transition, collaboration, resourcing to accelerate climate action, enhancing knowledge and skills, leadership, decarbonising investments, and minimising our operating carbon footprint.

The commitment is designed to be a high-level document that other New Zealand philanthropic funders are encouraged to sign up to. To read the full commitment, please visit: www.climateactionaotearoa.co.nz

**Climate
Action
Aotearoa**

**The Funders Commitment
on Climate Action.**

Responsible Investments

Otago Community Trust believes in the principles behind Responsible Investing: by integrating environmental, social and governance factors into investment decision-making, we can identify opportunities and risks, resulting in better financial outcomes. The Trust recognises the increasing impact of climate change as an investment risk and an investment opportunity.

The Trust will not invest in industries or sectors that are contrary to New Zealand legislation or current government policies, or where there is clear evidence that it is contradictory to the Trust's mission of benefitting Otago communities, or where the investments will negatively impact long-term environmental and social sustainability.

We remain committed to improving our Environmental, Social, and Governance (ESG) investment profile. Half of our global equity investments remain in a sustainable shares fund, a fund that reduces exposure to carbon and fossil fuel reserves and increases exposure to companies with a high responsible investment rating and to those participating in the transition to renewable energy.

Looking ahead, we anticipate financial market volatility to continue. We are working closely with our new Investment advisor Mercer to further refine our Statement of Investment Policy and Objectives ('SIPO').

Photo Courtesy of the Halo Project

Otago Community Trust was pleased to approve a \$118,111 grant to The Halo Project – Source to Sea programme in December 2022. A community-led conservation project that works with land managers to fence and restore waterways, wetlands, and forest habitats on public and private land across Coastal Otago, specifically from West Harbour-Mount Cargill to the Waikouaiti River.



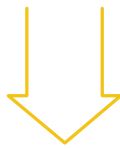
Our Investments

Ō Mātou Haumi



\$284.9m

Value of the trust funds as at 31 March 2023



-2.5%

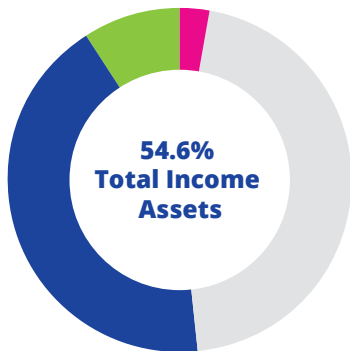
Return on Investment as at 31 March 2023



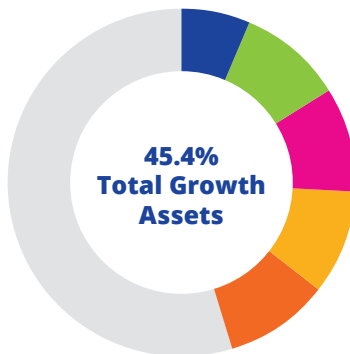
\$209.3m

Funding approved across Otago since inception as at 31 March 2023

Strategic Allocation Of Financial Assets



- **42.7%** Global Fixed Interest
- **8.6%** NZ Fixed Interest
- **3.3%** NZ Cash



- **6.4%** NZ Equities
- **9.7%** Global Shares
- **9.7%** Hedged Global Shares
- **9.7%** Sustainable Shares
- **9.8%** Hedged Sustainable Shares

Otago Community Trust's ability to grant is underpinned by the performance of its investment portfolio. Established in perpetuity, the Trust aims to grow the value of our capital fund and maximise the funding available for granting, with the flexibility to respond to investment opportunities as they arise.

The initial capital of the fund was officially established at \$63 million in December 1994. Subsequently, it was increased to \$131 million in June 1996 when the remaining shares in Trust Bank were sold. Since then, the Trust's investment base has grown from \$131 million to \$284.9 million as of March 31, 2023.

In April 2023, the Trust announced the selection of Mercer NZ Ltd as its new investment consultant. We would like to express our gratitude to the outgoing consultant, Russell Investments, for their longstanding commitment and outstanding service to the Trust.

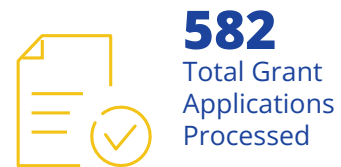
Mercer NZ Ltd will provide traditional advisory services, strategic advice, portfolio construction, and risk assessment for Otago Community Trust.

Otago Community Trust Annual Returns (Year to 31 March)



Our Funding

Tō Mātou Tahua Pūtea



From 1 April 2022, Otago Community Trust adopted four new Funding Pillars, which are our key strategic focus areas. Each has a set of funding priorities that form the foundation of our granting. Our five funding sectors remain unchanged, and the Trust continues to award grants, both small and large, covering a wide range of projects and activities across the sectors of Arts and Culture, Community, Environment and Heritage, Learning and Sports and Recreation.

Granting By Funding Pillar



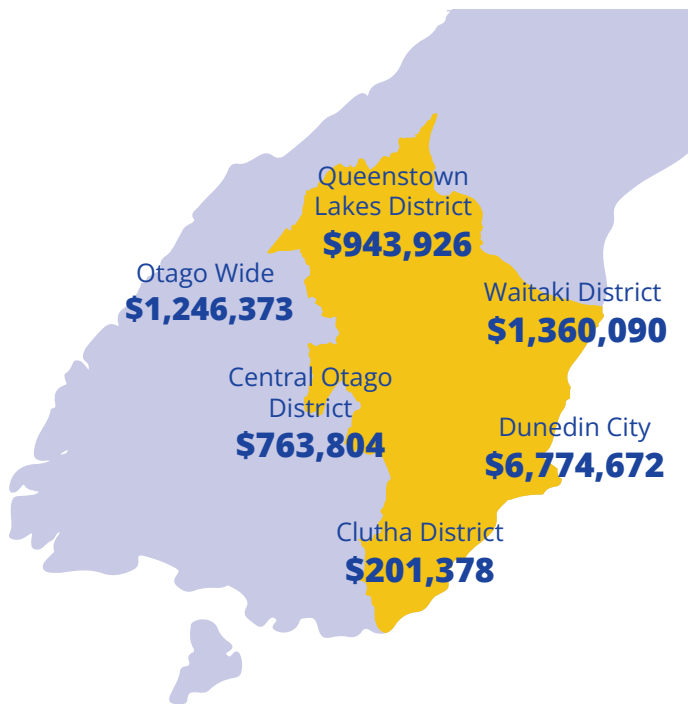
86%
Of grants were targeted towards priority communities.

Granting By Funding Sector



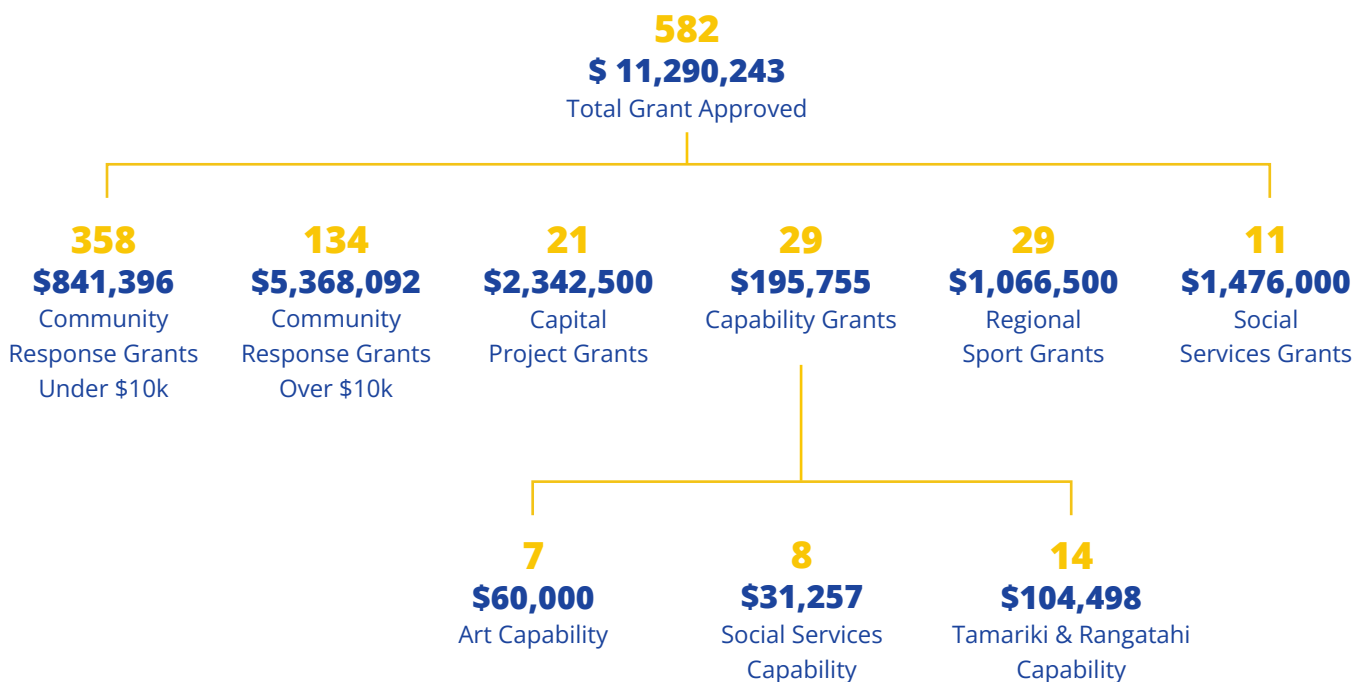
For further information on our new funding priorities visit: <https://www.oct.org.nz/about-us/our-strategic-plan>

Granting By Area



Otago Community Trust funds as far south as the Catlins and was pleased to provide a grant of \$49,423 to The Catlins Area School in May 2022 to upgrade the school's court areas.

Granting By Application Type (\$000)

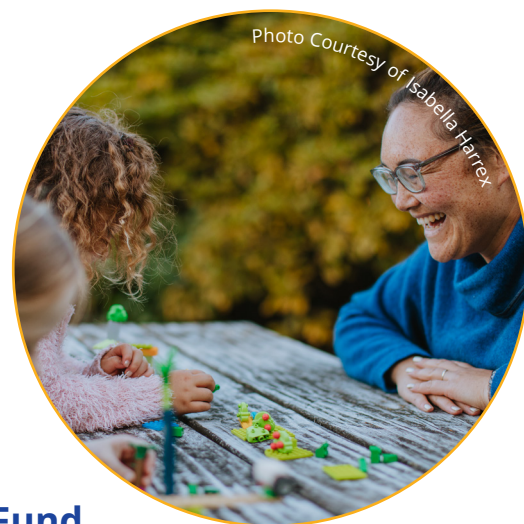


Tamariki & Rangatahi Strategy

Otago Community Trust's new Tamariki and Rangatahi strategy came into effect on 1 April 2022 and aims to lift the capability of the Otago region's young people. Up to \$10 million has been earmarked to fund initiatives that align with the new strategy over the next five years (2022-2027), and three new funds have been developed to support organisations and initiatives that seek to support the region's young people.

Our Vision

"All tamariki and rangatahi in Otago are valued, accepted, and empowered to lead fulfilled lives. They are healthy, happy and their wellbeing is nurtured."



Impact for Tamariki and Rangatahi Fund

Launched April 2022

The Impact for Tamariki and Rangatahi Fund provides a small number of high-investment grants to projects that have the potential for long-term, intergenerational change for tamariki, rangatahi and whānau. The Fund has a focus on relationships between the Trust and grantees.

\$1,445,660 Approved for 2
Impact for Tamariki and Rangatahi Grants

He Ao Hou i Otepoti ki te Raki Charitable Trust

He Ao Hou i Otepoti ki te Raki Charitable Trust was awarded \$690,000 over 3 years to deliver the He Ao Hou project in North Dunedin. This project aims to improve the lives of children and young people by addressing gaps in education, health, and social support.

The project employs a small team to work with North Dunedin schools and early childhood centres to support whānau and education providers to ensure tamariki and rangatahi can access best practice services when needed.

Te Hou Ora Whānau Services

Te Hou Ora Whānau Services (THO) was awarded \$755,660 over 3 years, with the funding being used to establish a project management team within Te Hou Ora Whānau Services.

The team will provide vital capability to the organisation and support the development and roll-out of four new Te Hou Ora Whānau Services initiatives targeting 0-24-year-olds.

Te Hou Ora Whānau Services is a Kaupapa Māori service provider that seeks to empower tamariki, rangatahi and whānau to reverse cycles of hardship and create positive opportunities for themselves within the context of their cultural identity through the application of reo me ngā tikanga Māori.



Otago Community Trust's investment in our vision: "Whakamana ngā pā harakeke — empowering whānau" enables us to realise the potential of some incredibly exciting opportunities. We look forward to working with the Otago Community Trust on this initiative and strengthening our relationship for the future.

Dan Anderson, Kaiwhakahaere (Chief Executive), Te Hou Ora Whānau Services



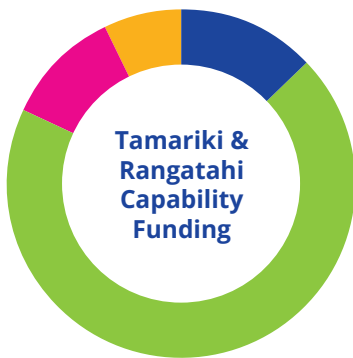
Tamariki and Rangatahi Sector Capability Fund

Launched July 2022

The Tamariki and Rangatahi Sector Capability Fund provides organisations working in the youth sector with grants of up to \$10,000 to support projects that develop their organisational capability. This includes but is not limited to professional development, policy reviews, strategic planning activities, developing evaluation frameworks and cultural capability development.

\$104,498 Approved for 14

Tamariki & Rangatahi Sector Capability Fund Grants



- 13% (3) Alexandra
- 69% (8) Dunedin
- 11% (2) Otago
- 7% (1) Wanaka



Photo Courtesy of Clare Toja-Bailey, Image Central

"Having the ability to work with an external facilitator for this process will both grow our own governance capability and ensure our strategic plan to guide the coming years' operations will be high quality and fit for purpose. This will enhance our long-term sustainability and enable Journeys to best support the evolving needs of girls and women in Central Otago"

Megan Longman, Journeys Charitable Trust



Rangatahi-led Funds

Launching in 2023

Four new Rangatahi-Led Funds will be established and launched in 2023, supported by groups of rangatahi (young people) across the region. These groups will take the lead on each of these new funds, providing grants for projects for young people, led by young people. Dunedin and North Otago will be the first to launch their funds in May 2023, with South Otago and Central Otago to follow shortly after.



Our Community

Tō Mātou Hapori

Our funding contributes to supporting the fabric of our community.

The stories profiled in the following section feature the work of just a few diverse groups who received grants under our new funding pillars this financial year.



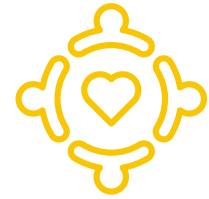
Mint Charitable Trust

Mint is a charitable trust set up to support children and young adults with intellectual disabilities in the Upper Clutha Region to create a meaningful and sustainable life within their own community. Otago Community Trust provided a \$15,000 grant in October 2022 to Mint Charitable Trust to support the planning and delivery of tailored experiences in sports, recreational, cultural, and social settings.

Empowered Communities

Hapori whaikaha

Communities are strong, vibrant and resilient. They collaborate and share ideas and resources. They support volunteers and volunteering initiatives.



Building A Sustainable Community

Hampden Community Energy Society Inc | \$100,000 | North Otago

The Hampden Community Energy Society Inc was formed in 2006 after a series of community meetings and information forums on energy and climate change. Since then, the Hampden Community Energy Society Inc has built a new resource recovery shop, set up a community grants scheme with a pool of \$5,000 and provided an equipment share service offering specialised equipment, tools and a new community EV to local residents.

The latest project the community is working towards is setting up and building a comfortable, versatile and sustainable community workshop and garden complex that will provide the members of the Hampden community with a safe social area to come together and participate in activities, workshops, training and skill sharing.

To assist with the cost of creating this space, Hampden Community Energy Society Inc was approved a \$100,000 grant to support the new community workshop and garden complex. The new complex will provide a facility for school pupils and community members to work in a central place, sharing skills, knowledge, and resources.

Once completed, this workshop will feature a covered workspace suitable for various activities from engineering to arts and crafts, a social and office space and a garden space for learning about food production.

Hampden Community Energy Society Inc Chair Dugald MacTavish said the project is being coordinated jointly between the Hampden school and the local community, and it is "just fantastic" to have Otago Community Trust's support and vote of confidence for this critical first stage.

"It's a three-stage project. This first and most important stage is the engineering and craft workshop which will allow the group to get the project underway quickly and then be used to house the equipment and provide the space to help construct the other buildings."

"Every day we hear more stories of social and economic stress. Our group thinks a good response to that is to build local capacity with facilities for creativity, skill sharing, and simply enjoying each other's company within our village. Our hope is that this workshop will help do that," said MacTavish.



"It is a true community collaboration, that aligns well with all four of the Trust's new strategic pillars but especially 'Empowered Communities'. It is a project that will encourage collaboration, support local volunteering, and encourage community connection and social responsibility."

Dicon Sim, Otago Community Trust



Amplifying Community Voices

Otago Access Radio | \$90,000 | Greater Dunedin

Otago Access Radio, also known as OAR FM Dunedin, is a dynamic not-for-profit radio station based in Dunedin. Since its establishment in 1991 as Hills AM and later rebranded as Otago Access Radio in 2011, the station has been dedicated to hosting programs created by, for, and about local communities. Broadcasting on 105.4FM and 1575AM, with a live stream and podcasts available on their website, OAR FM Dunedin provides a platform for diverse voices to be heard.

Recently, OAR FM Dunedin faced the challenge of relocating from its previous location at the Dunedin Community House. However, they viewed this as an opportunity to upgrade their facilities and embrace digital technologies to better support their community of over 190 volunteers. Recognising the financial burden and logistical complexities associated with relocating a radio station, Otago Community Trust stepped in with a generous grant of \$90,000 to assist with the relocation and equipment upgrades.

This grant has enabled OAR FM Dunedin to undergo a significant transformation by replacing aging and unreliable equipment with state-of-the-art technology. The new digital studio suite will provide an intuitive and user-friendly platform for local volunteers to create content from various locations, ensuring that a broader range of perspectives from diverse communities can be shared on-air and across online platforms.

Otago Community Trust Grants Manager, Sue Stewart, highlighted how trustees were happy to support the project to ensure that listeners could continue to enjoy a captivating blend of information, opinion, debate, and a diverse range of ad-free music genres.

“By granting access to facilities, training, and infrastructure, OAR FM Dunedin will persist in amplifying the voices of Dunedin and Otago residents, fostering participation, facilitating information sharing, and promoting community engagement.” Sue Stewart, Grants Manager

As a proud member of the network of 12 Community Access stations across the country, OAR FM Dunedin plays a vital role in providing opportunities for individuals to create, support, or sponsor programs catering to the interests of Dunedin and Otago listeners.

“We are extremely grateful to receive this funding support from Otago Community Trust for our most ambitious project to date. This contribution will facilitate the relocation and long-term sustainability of Ōtepoti Dunedin’s inclusive Community Access Media, ensuring OAR’s ability to amplify the voices of our ever-growing range of diverse communities.”

Lesley Paris, Station Manager



Improved Health & Wellbeing

Ka pakari ake te oraka

People have access to health and welfare services and are able to participate in recreation and leisure activities.



Making A Spalsh In Teviot

Roxburgh Pool Punawai Ora 'Safe Water' | \$500,000 (2021) \$85,000 (2022) | Central Otago

The new Roxburgh community swimming pool will open this year after undergoing a much-anticipated transformation, thanks to generous grants from Otago Community Trust. The \$585,000 funding received from Otago Community Trust will be utilised to replace the existing 90-year-old pool into a modern outdoor facility that caters to the needs of the entire community.

The pool will feature a 25-meter, 4-lane swimming pool alongside a learners' pool, ensuring accessibility for all members of the community. To promote sustainability, the facility will incorporate heating systems and solar panels that will maintain the water temperature and generate electricity for the grid during periods of low usage.

For nearly a decade, a dedicated group of volunteers has diligently kept the aging pool operational, but the time has come for a much-needed redevelopment. The new facility will not only serve as a recreational hub but also provide a safe and secure swimming space, discouraging individuals from venturing into the nearby Clutha/Matua Au River, known for its hazardous conditions.

Once completed, the pool will offer a wide range of activities and opportunities for the residents of Roxburgh. From swimming instruction and fitness programs to school curricula and engaging family activities, the facility aims to cater to diverse interests and age groups. Additionally, the pool will serve as a venue for social events, fostering community bonds and interactions.

The location of the new pool will be adjacent to the existing facility, on the same site as the Roxburgh Area School. This convenient placement ensures easy access for students and community members alike.

The fundraising efforts to replace the old pool have spanned over 16 years, with significant contributions from key funders such as the Otago Community Trust, Central Lakes Trust, Ida MacDonald Charitable Trust, Central Otago District Council, and Lotteries. The collaboration between these entities highlights the community's shared vision and commitment to providing a modern, safe, and inclusive swimming complex for the Teviot Valley community.

The residents of Roxburgh eagerly await the unveiling of the new pool, which will undoubtedly enhance the quality of life, promote well-being, and offer recreational opportunities for all members of the community.

Otago Community Trust was pleased to provide support to the much-needed redevelopment of the community swimming pool at Roxburgh. "The almost century-old Roxburgh pool has served its community well, but it is now time for a new modern facility to serve the community."

Diccon Sim, Otago Community Trust



Celebrating The Art Of Swing Dance, Jazz & The Blues

Swing Riot Dunedin | \$2,000 | Greater Dunedin

For nearly a decade, the vibrant city of Dunedin has been immersed in the joyous rhythms of swing dance. It all began in March 2016 when a group called OUSA Vintage and Swing Society was established, reflecting the growing interest of Otago University students in this captivating dance form. This society provided a platform within the university setting for students to embrace and celebrate swing dance and its rich culture. Collaborating with Swing Riot Dunedin, they organised a range of events, including the renowned Midwinter Swing Festival. In 2018, the two groups merged, forming the new organisation known as Swing Riot Dunedin.

Every year, the Midwinter Swing Festival entices more than 120 participants, half of whom enthusiastically immerse themselves in the entire duration of the event. While the majority of dancers hail from Dunedin, the festival also attracts enthusiastic participants from all over New Zealand and has even lured dancers from across the Tasman Sea in Australia. The other half of attendees comprise members of the wider Dunedin community, drawn to the festival's enticing "taster dance classes" held before each evening dance event. These classes provide the perfect opportunity for locals to try their hand (or rather, their feet) at this invigorating art form, fostering new hobbies and promoting a fun and healthy way to stay active.

The festival offers much more than just energetic dancing; it provides a platform for world-class dance tuition and showcases the best live jazz and blues bands that Dunedin has to offer. The participants are treated to captivating performances and instruction by leading dance instructors from New Zealand, allowing them to refine their skills and elevate their passion for swing dance. Immersed in the mesmerising melodies of jazz and blues,

festival-goers revel in the rich cultural tapestry of Dunedin's historic venues, setting the stage for unforgettable nights of dance and music.

Now in its seventh year, the Midwinter Swing Festival has become an integral part of Dunedin's annual calendar, celebrating the art of swing, jazz, and blues dance and music. The festival spans three exhilarating days filled with dance workshops led by accomplished instructors, while the evenings come alive with the soul-stirring performances of Dunedin's finest jazz and blues bands. Swing Riot Dunedin prides itself on the festival's ability to inspire members of the community, exposing them to world-class dance instructors who ignite their creative spirits.

Otago Community Trust is pleased to be a cornerstone supporter of the event year after year. Recognising the festival's cultural significance and its positive impact on the community, Trust has consistently provided a generous grant of \$2,000 annually.

It is pleasing to see with our financial support, the festival has been able to flourish and continue offering its enriching experience to dancers and music enthusiasts alike.

Sue Stewart, Otago Community Trust

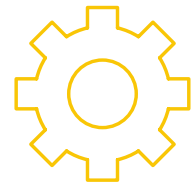


Photos Courtesy of Amanda Konijn

Increased Access To Opportunities

Ka pakari ake te oraka

All are valued for the contribution that they make. The region has a thriving economy that directly contributes to inclusive growth



Shining In A Rainbow Of Pride: Embracing Diversity & Inclusion

Dunedin Pride Inc | \$7,000 | Greater Dunedin

Dunedin Pride, a volunteer-driven organisation, is dedicated to fostering connections and providing support for the local takatāpui and rainbow community in Ōtepoti. Their mission involves organising an array of fantastic activities that cater to diverse interests. From regular Pride Night events to clubs, reading groups, social sports, and the renowned Dunedin Pride Youth Ball, there is something for everyone to enjoy.

This year, Dunedin Pride took their commitment to the next level by expanding Dunedin Pride Week into an entire month-long celebration. Throughout March, over 700 individuals participated in various events, including captivating displays, the Pride walk and picnic, movie nights, and literary and theatre events, among many others.

Pride Month serves as a unifying occasion for the community to celebrate the beauty of queerness and queer individuals in the vibrant city of Dunedin. At its core, it aims to create safe spaces where people can come together, engage in numerous activities, and foster a sense of pride and connection to their culture and heritage.

Pride is deeply cherished as a cultural taonga by the takatāpui and rainbow community. It serves as a conduit for their connection, thriving, resilience, and joy, rooted in a rich whakapapa. Pride events have proven instrumental in facilitating friendships, accessing vital support systems, enhancing mental well-being, promoting understanding, facilitating employment opportunities, and so much more.

Dunedin Pride received valuable support from the Otago Community Trust, who generously granted \$7,000 to promote and bolster Dunedin Pride Month. This funding played a crucial role in facilitating and enhancing the month-long celebration, which encompassed 31 days of takatāpui and rainbow community festivities in Ōtepoti Dunedin.

“The positive impact of Dunedin Pride is evident at every event, as it fosters resilience and healing among its participants. Volunteers have witnessed firsthand the transformative power of these gatherings.”

Dunedin Pride Volunteer



Unlocking Opportunities: Empowering Youth Through Forestry Pathways

Tokomairiro High School | \$23,000 | South Otago

Today, many young individuals face difficulties in traditional classroom settings, hindering their enjoyment of learning and eroding their confidence in their abilities. Tokomairiro High School recognises this challenge and has developed the Forestry Pathways Programme to support these students and demonstrate the potential of forestry as a viable career option.

Lynda Allan, the Training Programme Manager at Tokomairiro Training Centre, explains that the Forestry Pathways Programme aims to remove obstacles to learning for young people who often find themselves at risk of dropping out of school.

In October 2022, the Otago Community Trust granted Tokomairiro High School \$23,000 to support the operational costs of the programme. The Trust also previously supported the programme in 2021. By investing in this initiative, the Trust aims to break down barriers and empower young individuals to pursue career opportunities in forestry.

The Forestry Pathways Programme has been carefully designed as a level 2/3 course, providing students with comprehensive knowledge and skills in the forestry industry. It prepares them for employment in areas such as silviculture, logging, and associated industries or enables them to pursue further education at the tertiary level.

Over the past three years, 27 students have successfully graduated from the Forestry Pathways Programme. The staff at Tokomairiro High School eagerly anticipate the enrollment of even more students and their completion of the programme.

The feedback from students has been overwhelmingly positive, with several of them now gainfully employed in the industry. This success highlights the program's effectiveness in creating tangible career prospects for young individuals.

Otago Community Trust Chair, Diccon Sim, said trustees were particularly impressed with the Forestry Pathways Programme. The program not only provides economic benefits but also enhances employment prospects for numerous young people in Otago.

"This program offers a practical and hands-on learning experience, helping students develop self-assurance and discover a genuine passion for learning. By acquiring the necessary skills, they are equipped for success in one of New Zealand's crucial primary industries."

Lynda Allan, Training Programme Manager



Thriving Children & Young People

Ka ora rawa atu kā tamariki me kā rakatahi

All children and young people in Otago are valued, accepted and empowered to lead fulfilled lives. They are healthy, happy and their wellbeing is nurtured.



Te Pōhā - Weaving Together The Knowledge Of Mahika Kai & Mahika Tipuna In The Moeraki Takiwā

Te Hā o Maru Social Services | \$84,000 | North Otago

Te Hā o Maru is an emerging Health and Social service owned and operated by Te Rūnanga O Moeraki. Led by Toihau — Executive Officer Mani Malloy-Sharplin, Te Hā o Maru is dedicated to providing a unique kaupapa Māori approach to health and social services, specifically as the only mana whenua health and social service in the takiwā.

One of their notable initiatives is the Te Pōhā programme, which focuses on mahika kai (food-related activities) to enhance participants' overall well-being from a Māori worldview. In February 2023, Te Hā o Maru received an \$84,000 grant from the Otago Community Trust to support the establishment costs of Te Pōhā. This program aims to connect participants to the land, teach them about Māori worldviews and traditional practices, and engage them in intergenerational activities centred around seasonal kai (food).

The four-week Te Pōhā programme runs continuously throughout the year and is open to rakatahi (young people) and their whānau (extended family). It encourages participants to connect with the whenua o Moeraki (land of Moeraki) and mātauraka Moeraki (knowledge of Moeraki), incorporating activities related to gathering and preserving food and engaging with the environment. The program aims to address mental, physical, social, and spiritual health using these methods as a framework.

Te Hā o Maru actively encourages the participation of not only rakatahi but also their extended whānau to show support whenever possible. It's important to note that Te Pōhā is just one part of a comprehensive suite of services offered by Te Hā o Maru, highlighting the organisation's commitment to holistic health and social support.

Te Reo Māori translation: Please note, Te Hā o Maru Social Services uses the local Kāi Tahu dialect which replaces 'Ng' with 'K', e.g. rakatahi instead of rangatahi.

"As Moeraki mana whenua, we have a responsibility to take these practices and offer them to our communities in an effort to support each and every person that participates to lead out their own self-lead health initiatives via connection."

Toihau Executive Officer, Mani Malloy-Sharplin



Wānaka Kai Delights: From Garden To Table

Wānaka Primary School | \$10,000 | Queenstown Lakes

Wānaka Primary School's vision of creating a thriving outdoor classroom where students can cultivate their knowledge and appreciation for nature received a significant boost with a grant of \$10,000 from the Otago Community Trust.

In addition to the garden expansion, Wānaka Primary School is also undertaking the creation of a new kitchen/dining area that will serve as the heart of their Garden to Table sessions. These sessions are designed to engage students in hands-on learning experiences, with half of the class actively participating in the garden while the other half gain culinary skills in the kitchen. The culmination of their efforts is a shared feast where everyone comes together to enjoy the delicious kai they have collectively prepared. This holistic approach empowers students, teaching them essential skills such as food cultivation, harvesting, preparation, and the significance of sharing sustenance sustainably across different seasons.

Notably, every aspect of the students' garden endeavours aligns with the curriculum, effectively integrating core subjects with practical outdoor education. By getting their hands dirty and actively participating in the garden, students are not only acquiring academic knowledge but also developing crucial life skills. Wānaka Primary School has

witnessed the incredible achievements that students have made within their current limited space, and the anticipation for what lies ahead following the completion of the garden extension is palpable among both students and teachers alike.

Through the support of the Otago Community Trust, Wānaka Primary School's garden and kitchen/dining area transformation will nurture a generation of independent and resilient community members. By instilling a sense of self-sufficiency and fostering sustainable practices, this project will not only benefit the students directly involved but also inspire a broader appreciation for nature and healthy living within the school and the local community.

This grant aims to support the school's efforts in extending and developing their school garden into a vibrant, fenced space that can be utilised by all students throughout the year.

Sue Stewart, Otago Community Trust



Grants List

Kā Takuhe

Central Otago District	
Alexandra and Districts Youth Trust	\$6,583
Alexandra Blossom Festival Inc	\$9,999
Alexandra Bowling Club Inc	\$8,000
Alexandra Child Care Centre Inc	\$1,140
Alexandra Community Advice Network Inc	\$2,000
Alexandra Mens Shed Trust	\$5,000
Alexandra Primary School	\$1,600
Central Otago A & P Association	\$4,062
Central Otago Compassionate Friends	\$2,500
Central Otago District Arts Trust	\$6,000
Central Otago Friendship Network	\$3,500
Central Otago Group Riding for the Disabled Association	\$9,000
Central Otago Regional Choir	\$2,500
Central Otago Regional Orchestra	\$3,800
Central Otago Search and Rescue (COSAR)	\$9,000
Chamber Music at the World's Edge Foundation	\$5,000
Clyde Bowling Club	\$5,000
Clyde Primary School	\$620
Coastguard Clyde Inc	\$12,000
Constructing Community	\$1,000
Cromwell and Districts Promotion Group Inc	\$15,000
Cromwell College	\$470
Cromwell Junior Associated Football Club	\$10,000
Cromwell Museum Trust	\$2,000
Cromwell Primary School	\$2,755
Dunstan Arm Rowing Club Inc	\$10,000
Dunstan Equestrian Centre	\$12,000
Dunstan High School	\$1,400
Goldfields Primary School	\$300
Iceinline Central Inc	\$250,000
Journeys Charitable Trust	\$2,255
Mainland South BMX Assn Inc	\$16,250

Maniototo Area School	\$760
Millers Flat School	\$40,000
Naseby Development Charitable Trust	\$12,000
Naseby Golf Club Inc	\$9,900
NZ Curling Assn Inc	\$18,540
Poolburn School	\$3,600
REAP - Central Otago	\$40,000
Roxburgh Pool, Punawai Ora 'Safe Water' Inc	\$85,000
Sticks n Stones Inc	\$60,000
Tarras School	\$15,000
Teviot District Museum Inc	\$50,000
The Terrace School	\$5,270
Under Rough Ridge Writers' Trust	\$3,000
Central Otago District Total	\$763,804

Clutha District	
Balclutha Contract Bridge Club Inc	\$4,000
Balclutha Primary School	\$240
Clutha District Council - Aspiring Leaders	\$2,000
Clutha District Council - Rural Travel Fund	\$10,000
Clutha Valley Primary School	\$2,632
Goldfields Kindergarten	\$2,000
Hone Tuwhare Charitable Trust	\$8,000
Insert Coin To Play Charitable Trust	\$1,500
Jennys Companionship Group Inc	\$4,000
Kaitangata & District Promotions Inc	\$15,000
Kaitangata Golf Club Inc	\$3,000
Kaitangata Volunteer Fire Brigade	\$15,000
Kaka Point Community Group	\$2,100
Lawrence Chinese Camp Charitable Trust	\$5,000
Life Education Trust Heartland Otago Southland	\$10,000
Milton Community Health Trust	\$5,000
Milton Elder Care Trust	\$4,000
Milton Opportunities Charitable Trust	\$3,000
Mount Zion Church	\$3,000

Our Hut Heritage Hub	\$562
Poupoutunoa Kindergarten	\$2,453
Rosebank Kindergarten	\$2,000
Rosebank Primary School	\$500
South Otago Agricultural & Pastoral Soc	\$2,000
South Otago School of Bagpipe Music	\$1,000
St Marys School Milton	\$11,000
Taieri Mouth Amenities Soc	\$9,000
Taieri Mouth Multisport Event	\$863
The Catlins Area School	\$49,423
Tokomairiro High School	\$23,000
Warepa School	\$105
Clutha District Total	\$201,378

Dunedin City

Abbotsford School	\$150
Able – Southern Families Support	\$50,000
ADL	\$9,000
Age Concern Otago Inc	\$64,937
Altrusa International Taieri	\$2,700
Alzheimers Society Otago Inc	\$3,500
Amputee Society of Otago & Southland Inc	\$500
Andersons Bay Bowling Club Inc	\$2,000
Anglican Family Care	\$260,000
Aroha Ki Te Tamariki	\$89,000
Arthur Street School	\$375
Arts On Tour NZ	\$20,000
Athletics Otago Inc	\$26,000
Balmacewen Bowling Club Inc	\$2,700
Balmacewen Intermediate School	\$580
Basketball Otago Inc	\$60,000
Bathgate Park School	\$1,577
Bayfield High School	\$5,265
Belleknowes Golf Club	\$30,000
Bowls Dunedin Inc	\$1,000
Bradford Primary School	\$70
Broad Bay Community Centre	\$6,000
Broad Bay School	\$600
Brockville School	\$1,920
Cancer Society of NZ Otago & Southland	\$25,000
Catholic Social Services	\$64,550
Caversham Baptist Church	\$2,114

CCS Disability Action Otago Inc	\$17,500
Chairpersons Fund	\$3,750
Chisholm Park Golf Club Inc	\$12,000
Citizens Advice Bureau – Dunedin	\$12,000
City of Dunedin Pipe Band Inc	\$4,000
Concord School	\$1,284
Cosy Homes Charitable Trust	\$14,790
Country Music Dunedin Awards (CMDA)	\$5,000
Creative Arts Trust - Artsenta	\$23,700
Disability Information Service Inc T/A Livingwell Disability Resource Centre	\$19,000
Diving Ōtākou	\$5,500
Dunedin Choral Society	\$9,000
Dunedin City Council – Dunedin Cycling Project	\$48,306
Dunedin City Council - FIFA Fan Festival	\$50,000
Dunedin Civic Orchestra Inc - T/a Dunedin Symphony Orchestra	\$9,920
Dunedin Community Care Trust	\$10,000
Dunedin Concerto Competition	\$10,000
Dunedin Curtain Bank Trust	\$4,950
Dunedin Edinburgh Sister City Society Inc	\$6,000
Dunedin Friend-Link Trust	\$6,500
Dunedin Fringe Arts Trust	\$112,980
Dunedin Gymnastics Academy	\$16,500
Dunedin Ice Hockey Assn	\$2,095
Dunedin Ice Skating Club Inc	\$12,500
Dunedin Midwinter Celebrations Trust	\$25,440
Dunedin Musicians Club Inc	\$4,905
Dunedin Netball Centre Inc	\$5,000
Dunedin North Intermediate School	\$200,625
Dunedin Performing Arts Competitions Society Inc	\$5,400
Dunedin Philippine Club Inc	\$15,000
Dunedin Poultry Pigeon & Cage Bird Club	\$1,909
Dunedin Pride Inc	\$11,800
Dunedin Rudolf Steiner School	\$840
Dunedin Senior Chinese Assn	\$2,000
Dunedin South City FC Inc	\$3,500
Dunedin Tai Chi Club Inc	\$3,180
Dunedin Tap Dancing Society	\$2,000
Dunedin Wildlife Trust	\$22,000
Dunedin Workers Educational Assn Te Wāhi Ākoranga o Ōtepoti Inc	\$10,000

East Otago Musical Theatre Incorporated	\$6,000	Māori Hill School	\$460
Elmgrove School	\$1,120	Maungatua Presbyterian Church	\$3,000
Enabling Love New Zealand	\$2,000	Methodist Mission Southern	\$225,000
Fairfield School	\$31,210	Mornington Kindergarten	\$2,016
Football South	\$67,000	Mosgiel Brass Band Inc	\$2,500
For Trades Apprenticeship Training Trust	\$48,000	Mosgiel Central Kindergarten	\$5,500
Friends of the Globe Theatre Inc	\$10,000	Mosgiel Piping and Dancing Society	\$877
George Street Normal School	\$1,200	Music4Us Puoro Mō Taatou Music Education Trust	\$6,000
Golf Otago Inc	\$27,500	Musselburgh School	\$650
Greater Green Island Community Network Charitable Trust	\$20,000	North East Valley Community Development Project Inc	\$4,500
Green Island Community Garden	\$1,000	Northern Junior Association Football Club Inc	\$1,000
Green Island School	\$1,150	Otago Academy of Sport	\$35,000
Grow NZ Inc – Dunedin Grow Centre	\$1,000	Otago Access Radio (Hills Radio Trust)	\$90,000
Harington Point Community Society Inc	\$21,000	Otago Artistic Gymnastics	\$865
He Ao Hou i Ōtepoti ki te Raki Charitable Trust	\$690,000	Otago Badminton Assn Inc	\$21,500
Hearing Association Dunedin Branch Inc	\$5,000	Otago Boys High School	\$74,310
Hiwa Navigation Ltd	\$10,000	Otago Cricket Assn Inc	\$60,500
Ice Sports Dunedin Inc	\$125,000	Otago Festival of the Arts Trust	\$7,600
iD Dunedin Fashion Inc Soc	\$33,060	Otago Fish & Game Council	\$2,900
Ignite Consultants	\$5,000	Otago Girls' High School	\$4,810
Ignition Childrens Book Festival Charitable Trust	\$5,000	Otago Hockey Assn (1990) Inc	\$44,300
Inspired Faith Church – Dunedin	\$8,000	Otago Medical Research Foundation	\$80,000
International Festival Environment Science Technology Dun NZ Inc	\$84,000	Otago Mounted Games Association	\$6,000
Kaikorai Grays Sport & Travel Inc	\$1,500	Otago Outdoor Education Trust	\$25,000
Kaikorai Junior Cricket Club Inc	\$2,000	Otago Polytechnic – Pacific Island Scholarships	\$10,000
Kaikorai Valley College	\$2,925	Otago Rowing Association Inc	\$30,000
Karitane Bowling Club Inc	\$2,000	Otago Rugby Football Union Inc	\$70,000
Kati Huirapa Runanga ki Puketeraki	\$50,000	Otago Rugby League Inc	\$25,000
Kavanagh College	\$2,935	Otago Secondary Schools Sports Assn	\$28,000
King's High School	\$4,000	Otago Softball Assn Inc	\$24,000
Kingslea School – Puketai	\$8,000	Otago Sports Car Club Inc	\$17,500
Leaning Lodge Trust	\$40,000	Otago Squash Rackets Club Inc	\$36,500
Leukaemia & Blood Cancer NZ	\$695	Otago Tertiary Chaplaincy Trust Board	\$2,000
Liberton Christian School	\$340	Otago Touch Assn Inc	\$44,000
Life Education Trust Coastal Otago	\$15,000	Otago University Hockey Club	\$310
Logan Park High School	\$18,805	Otago Youth Adventure Trust Inc	\$38,000
Macandrew Bay School	\$359	Otago Youth Wellness Trust	\$438,822
Macandrew Netball Club	\$1,000	Outram School	\$800
Malcam Charitable Trust	\$90,000	Pacific Trust Otago	\$26,913
Māori Hill Junior Football Club	\$720	Parafed Otago	\$22,000

Parent to Parent – Otago Branch	\$5,000
Pine Hill School	\$6,160
Port Chalmers Volunteer Fire Brigade	\$25,000
Pregnancy Help Inc Dunedin Branch	\$8,000
Presbyterian Support Otago	\$248,364
Progress of Waikouaiti Area	\$6,000
Pukehiki Church Trust	\$22,400
Pūrākaunui School	\$720
Queens High School	\$3,945
Roslyn Wakari Association Football Club Inc	\$4,000
Royal New Zealand Plunket Trust	\$15,800
Royal NZ Pipe Band Assn – Otago Centre	\$3,000
Sacred Heart School	\$716
Saddle Hill Foundation Trust	\$35,000
Santa Parade Trust	\$15,000
Save the Otago Peninsula (STOP) Society Inc	\$25,000
Sawyers Bay School	\$120
Silverstream South Primary School	\$4,227
Skeggs Foundation	\$47,480
Social Impact Studio - University of Otago	\$10,000
South Dunedin Community Network Inc	\$40,500
Southland and Otago Regional Engineering Collective (SOREC) Inc	\$13,000
Sport Otago	\$175,750
Sporting Chance c/- Sport Otago	\$15,000
Squash Otago Inc	\$27,500
St Bernadettes School	\$900
St Brigids School	\$1,050
St Clair School	\$2,205
St Clair Surf Life Saving Club Inc	\$62,500
St Marys School – Mosgiel	\$51,250
Stage South Charitable Trust	\$5,000
Stopping Violence Dunedin Inc	\$30,000
Straight Up Trust	\$40,000
Strath Taieri Agriculture & Rural Tourism Trust	\$16,000
SuperGrans Dunedin Charitable Trust	\$10,000
Swing Riot Dunedin Inc	\$2,000
Tahuna Normal Intermediate School	\$3,450
Taieri College	\$3,435
Taieri Hockey Inc	\$1,000
Tainui School	\$744

Te Hou Ora Ōtepoti Inc	\$810,660
Te Kura Kaupapa Māori o Ōtepoti	\$30,738
Te Mana Ahua Ake Charitable Trust	\$50,000
Te Rūnanga o Ōtakou	\$50,000
Tennis Otago Inc	\$26,000
The Anteroom Arts Charitable Trust	\$2,000
The Brain Injury Assn (Otago) Inc	\$820
The Connections Education and Development Trust	\$3,700
The Landscape Connections Trust	\$118,111
The Moana Tennis Club Inc	\$2,500
The Otago Pioneer Women's Memorial Association Incorporated	\$5,000
The Otago Society for the Prevention of Cruelty to Animals	\$4,000
The Taieri Rugby Football Club Inc	\$15,500
Tirohanga Presbyterian Camp Charitable Trust	\$20,000
Trinity Catholic College	\$160
Tūhura Otago Museum	\$80,000
University of Otago – Division of Sciences	\$4,452
Volleyball Otago	\$15,000
Volunteer South/Kaituao o te Taitonga	\$20,000
Waikouaiti District Museum Soc Inc	\$1,000
Waikouaiti Riding for Disabled	\$2,250
Wakari Cub & Scout Group – Scout Assn of NZ	\$7,000
Wakari School	\$700
Warrington Primary School	\$900
West Harbour Arts Charitable Trust	\$1,500
Whaiao Pūtea Inc	\$15,000
Yellow-eyed Penguin Trust	\$20,000
Youthline Otago Inc	\$53,000
Zimbabwe Otago Society	\$5,400
Dunedin City Total	\$6,774,672

Otago Wide	
Aphasia New Zealand (AphasiaNZ) Charitable Trust	\$4,000
Blue Light Ventures Inc	\$1,540
Chamber Music New Zealand Trust	\$20,000
Choirs Aotearoa NZ Trust	\$8,000
Crohn's & Colitis New Zealand Charitable Trust	\$5,000
Diabetes New Zealand	\$5,000

EECA (Energy Efficiency and Conservation Authority)	\$600,000
Gymnastics New Zealand	\$7,000
Holocaust Centre of New Zealand Inc	\$3,000
Institute of Directors in New Zealand Inc	\$29,640
Kiwi Family Trust	\$4,250
Neighbours Day Aotearoa Charitable Trust	\$3,000
Netball South Zone Inc	\$110,000
New Zealand Endometriosis Foundation Charitable Trust	\$5,000
New Zealand Red Cross Inc	\$19,700
New Zealand Rural General Practice Network	\$15,000
NZ Paramedic Education & Research Charitable Trust	\$778
NZ Special Olympics Lower South Island Regional Council	\$10,000
Outward Bound Trust of New Zealand	\$120,000
People First New Zealand Inc	\$2,000
Perinatal Mental Health New Zealand	\$1,716
Rata Foundation	\$10,000
Road Safety Education Limited	\$8,591
Rockquest Charitable Trust	\$6,500
Royal NZ Foundation of the Blind Inc	\$10,000
Salvation Army New Zealand	\$45,000
Shakespeare Globe Centre New Zealand	\$4,000
Show Me Shorts Film Festival Trust	\$4,700
Southern Cochlear Implant Programme (SCIP)	\$1,000
Southland Triathlon and Multisport Club Inc	\$1,780
Special Olympics New Zealand	\$20,000
SPELD NZ	\$11,000
Stroke Foundation of NZ	\$27,000
Surf Life Saving New Zealand Inc	\$43,000
Taki Rua Productions Society Inc	\$7,450
TalkLink Trust	\$6,320
Te Waipounamu Riders Against Domestic Abuse Trust	\$5,000
Te Whānau Tupu Ngātahi o Aotearoa – Playcentre Aotearoa	\$7,850
The Boys' Brigade in NZ Inc	\$15,000
The CanInspire Charitable Trust	\$2,500
The Girl Guides Association New Zealand Inc	\$2,161
The National Foundation for the Deaf Inc	\$2,500

The Student Volunteer Army Foundation	\$6,000
The UpsideDowns Education Trust	\$5,000
Tourette's Association of New Zealand	\$3,750
Viva Voce Inc	\$2,397
Wellington Museums Trust Inc	\$4,500
Young Workers Resource Centre Inc	\$8,750
Otago Wide Total	\$1,246,373

Queenstown-Lakes District	
Alpine Community Development Trust	\$20,000
Aspiring Beginnings Early Learning Centre Inc	\$6,400
Aspiring Gymsports Inc	\$15,000
Bike Wānaka Inc	\$20,000
Cavalcade Host Town Committee Inc	\$6,000
Central Otago Hockey Assn	\$15,000
Challenge Wānaka Sports Trust	\$15,000
Friends of Bullock Creek Inc	\$5,000
Good Bitches Trust	\$3,500
Hāwea Flat School	\$17,257
Hāwea-Wānaka Pony Club Branch Inc	\$5,000
Kahu Youth Trust	\$62,856
Mint Charitable Trust	\$15,000
Montessori Children's House Wānaka Trust	\$5,000
Mt Aspiring College	\$40,190
One New Zealand	\$10,000
Order of St John South Island Region	\$50,000
QLDC – Rural Travel Fund	\$7,186
Queenstown Lakes District Council	\$922
Queenstown Lakes District Council – Wānaka Youth & Community Centre	\$165,000
Remarkable Cancer Gym Charitable Trust	\$20,000
Snow Farm NZ Limited	\$180,000
Snow Sports NZ Inc	\$50,780
Southern Lakes Arts Festival Trust	\$85,000
Southern Lakes Model Fliers Club Inc	\$2,000
Upper Clutha Historical Records Society	\$2,500
Wānaka Arts Society	\$3,500
Wānaka Associated Football Club Inc	\$5,000
Wānaka Biathlon Club Inc	\$10,000
Wānaka Community Response Group	\$9,000
Wānaka Croquet Club Inc	\$7,500

Wānaka Preschool Early Childhood Centre	\$5,672
Wānaka Primary School	\$11,175
Wānaka Rowing Club Inc	\$5,000
Wānaka Search and Rescue Inc	\$15,207
Wānaka Squash Rackets Club Inc	\$2,500
Wānaka Yacht Club Inc	\$9,781
Wheels at Wānaka Charitable Trust	\$10,000
Winter Games NZ Charitable Trust	\$25,000
Queenstown-Lakes District Total	\$943,926

Waitaki District

26 Squadron Air Training Corp Oamaru	\$10,000
CCS Disability Action Waitaki Inc	\$9,000
Duntroon & District Development Assn Inc	\$4,000
East Otago High School	\$7,545
Excelsior Rugby and Associated Sports Club	\$2,500
Filipino Waitaki Incorporated	\$5,600
Hampden Community Energy Society Inc	\$100,000
Hampden Skate Park Incorporated Society	\$12,000
Harbour Street Jazz Inc	\$17,000
Kakanui School	\$1,800
Lake Ōhau Community Hub Charitable Trust	\$4,100
Maheno School	\$4,529
Musical Theatre Oamaru Inc	\$3,500
New Zealand Remembrance Army Waitaki	\$1,210
North Otago Cricket Assn Inc	\$2,000
North Otago Rugby Football Union Inc	\$22,000
North Otago Sports Bodies Assn Inc	\$1,500
Oamaru Combined Churches Christmas Parcels Trust	\$2,000
Oamaru Multisport Club	\$3,323
Oamaru Poultry Pigeon & Canary Society	\$500
Oamaru Rowing Club Inc	\$3,120
Oamaru Victorian Heritage Celebrations Committee	\$8,000
Otematata Golf Club	\$30,000
Otematata Residents Assoc Inc	\$20,000
Palmerston Primary School	\$180
Pottery on Tyne	\$2,500

St Josephs School – Oamaru	\$640
St Kevins College	\$12,000
St Patrick's of Oamaru Ecclesiastical Goods Trust	\$90,000
Te Hā o Maru Health and Social Services	\$84,000
Te Rūnanga o Moeraki	\$50,000
Waitaki Boys High School	\$2,290
Waitaki District Council – Aspiring Leaders	\$1,663
Waitaki District Council – Community Events	\$10,000
Waitaki District Council – Hampden Hall Committee	\$16,500
Waitaki District Council – Safer Waitaki Coalition	\$5,500
Waitaki District Council - Waitaki Cultural Facility	\$600,000
Waitaki Girls High School	\$190
Waitaki Outdoor Education	\$1,000
Waitaki Summer Music Camp	\$2,500
Weston School	\$25,900
Whalan Lodge Trust	\$180,000
Waitaki District Total	\$1,360,090

Total Grants Approved 2022/23

\$11,290,243	
LESS	
Grant Writebacks	\$178,565
DCC Arts Capability Reimbursement	\$30,000
\$11,081,678	

Financials

Rauemi Pūroko Ahumoni

Otago Community Trust Directory

For the year ended 31 March 2023

Trustees

Andrew Kilsby (Chairperson from May 2023)	Cromwell
Alofa Lale	Dunedin
Barbara Long	Dunedin
Kevin Malcolm (Resigned October 2022)	Oamaru
Tuari Potiki (Appointed October 2022)	Dunedin
Diccon Sim (Chairperson until April 2023)	Dunedin
Michael Stevens	Dunedin
Bridget Tweed	Waitahuna
Raewyn van Gool	Cromwell
Haley van Leeuwen	Dunedin
Rebecca Williams	Cromwell
Malcolm Wong	Dunedin

Chief Executive

Barbara Bridger

Registered Office

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

Auditor

Deloitte Limited,
Dunedin

Solicitor

Anderson Lloyd,
Dunedin

Investment Advisor

Russell Investment Group 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 2023
in New Zealand Dollars (\$000's)

	2023	2022
Gains/(losses) from investments	(11,298)	821
Expenditure	(1,373)	(1,341)
Surplus / (Deficit) before grants	(12,671)	(520)
Grants approved during the year	(11,082)	(10,089)
Surplus / (Deficit) before taxation	(23,753)	(10,609)
Income tax (expense)/refund	-	-
Surplus / (Deficit) for the year	(23,753)	(10,609)
Other comprehensive revenue and expenses	-	-
Total comprehensive revenue and expenses for the year	(23,753)	(10,609)

Summary consolidated statement of changes in trust funds

For the year ended 31 March 2023
in New Zealand Dollars (\$000's)

	2023	2022
Total trust funds at the beginning of the year	308,606	319,215
Plus total comprehensive revenue and expenses for the year	(23,753)	(10,609)
Total trust funds at the end of the year	284,853	308,606

Summary consolidated statement of service performance

For the year ended 31 March 2023

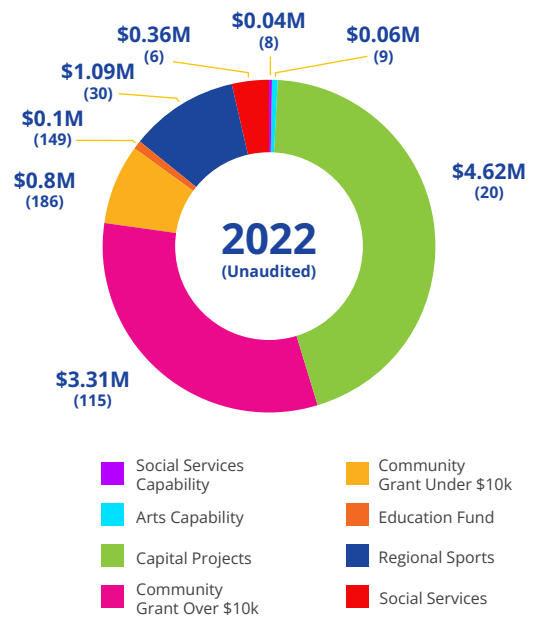
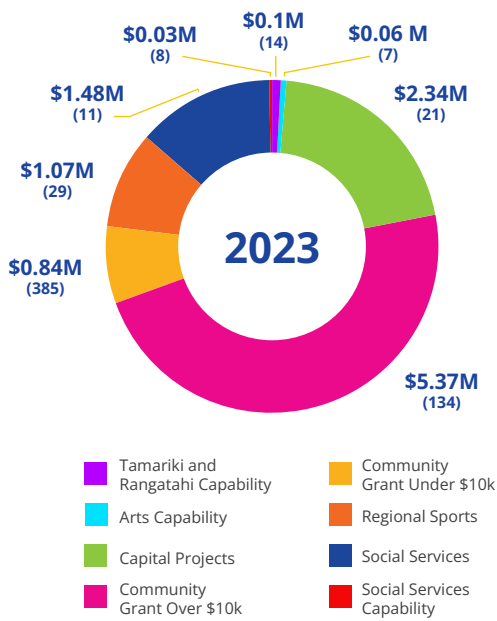
Who Are We?

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.

Why Do We Exist?

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

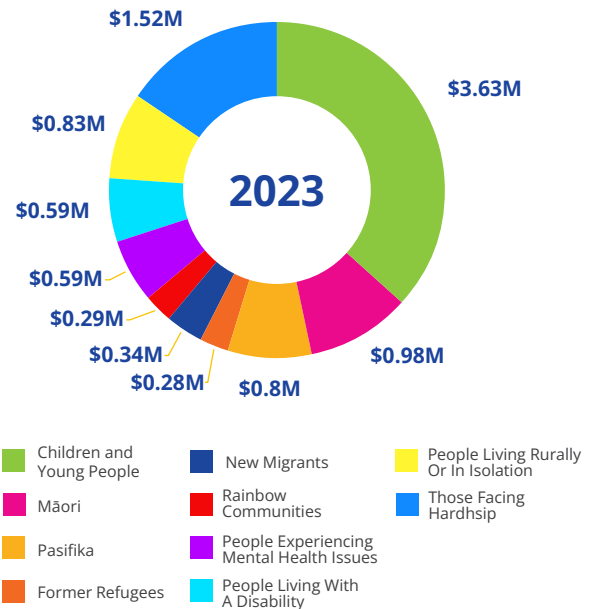
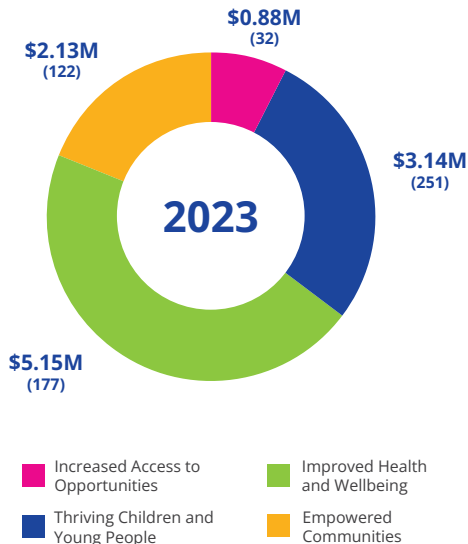
What Did We Do?



Why Have We Funded?

How Have We Performed?

In 2023 the Trust prioritised funding to priority communities with the aim to address the inequities they experience, 86% of grants were targeted towards priority communities.



Summary consolidated statement of financial position

As at 31 March 2023
in New Zealand Dollars (\$000's)

Assets	2023	2022
Cash and cash equivalents	701	883
Other current assets	66	46
Total current assets	767	929
Other investments	289,311	314,753
Property, plant and equipment	1,435	1,460
Total non-current assets	290,746	316,213
Total assets	291,513	317,142
Liabilities	2023	2022
Trade and other payables (including grants)	5,782	8,286
Total current liabilities	5,782	8,286
Trade and other payables (including grants)	878	250
Total non-current liabilities	878	250
Total liabilities	6,660	8,536
Net assets / Trust Funds	284,853	308,606

Approved on behalf of the Trustees



R.J.M (Diccon) Sim
Chairperson
25 July 2023



H.P (Haley) van Leeuwen
Trustee
25 July 2023

Summary consolidated statement of cash flows

For the year ended 31 March 2023
in New Zealand Dollars (\$000's)

	2023	2022
Net cash outflow from operating activities	(14,167)	(11,515)
Net Cash from/(used) in investing activities	13,985	11,483
Net cash from/(used) in financing activities	-	-
Net (decrease)/increase in cash and cash equivalents	(182)	(32)
Cash and cash equivalents at 1 April	883	915
Cash and cash equivalents at 31 March	701	883

Notes to the summary consolidated financial statements

For the year ended 31 March 2023

These are the summary consolidated financial statements of Otago Community Trust (the "Trust") for the year ended 31 March 2023.

The specific disclosures included in these summary consolidated financial statements have been extracted from the full annual consolidated financial statements dated 25 July 2023. The full annual consolidated financial statements were approved for issue by the Trustees on 25 July 2023 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 unqualified audit opinion has been received on the full consolidated financial statements for the year ended 31 March 2023. A copy of the full Trust consolidated financial statements for the year ended 31 March 2023 may be obtained by contacting the Trust on (03) 479 0994, or by visiting 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 25 July 2023.

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 accounting policies have been applied consistently to all periods presented in these summary financial statements, but for the adoption of PBE IPSAS 41 – Financial Instruments which was adopted during the 2023 – this resulted in updated accounting policies and disclosures only.

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

The group appointment a new investment consultant, Mercer NZ Limited post balance date, which is not expected to materially impact the operation of the group. No other events have occurred subsequent to year end that significantly affect the operations of the Trust (2022: Nil subsequent events).

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 29 to 30 and the summary consolidated statement of service performance on page 28. The complete set of summary consolidated financial statements comprises the summary consolidated statement of financial position as at 31 March 2023, 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 2023

In our opinion, the accompanying summary consolidated financial report, on pages 28 to 30, 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 do 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 25 July 2023. That report also includes:

Where the report on the audited consolidated statement of service performance includes an Other Matter paragraph, the corresponding service performance information in the consolidated statement of service performance for the year ended 31 March 2022 is unaudited.

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

25 July 2023

New Year's Eve - Party In The Park

Following the success of previous New Year's Eve celebrations, the Waitaki District Council had big plans for 2022. The Otago Community Trust approved a grant of \$10,000 to assist with the costs involved in holding a free community celebration.

The night's festivities included performances for the whole family with a kids zone, face painting, high-energy bands, and performances leading to the midnight countdown. Thanks to the support of the Otago Community Trust, this event was one to remember.

Photo courtesy of Waitaki District Council



Street Art – Making An Impact In South Dunedin

Otago Community Trust was pleased to provide a \$26,000 grant to South Dunedin Community Network to support the Street Art Trail initiative and it is magic to see the passion of artists Flox and Sweats, alongside Sean Duffell, make a lasting impact.

The vibrancy, colour and creativity of Street Art has the ability to lift an area and change how people view their community and themselves. Moreover, Street Art breaks down barriers to art. It enables a whole community to enjoy art in their living space and is the democratisation of art.

Photo courtesy of South Dunedin Street Art Trail



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