



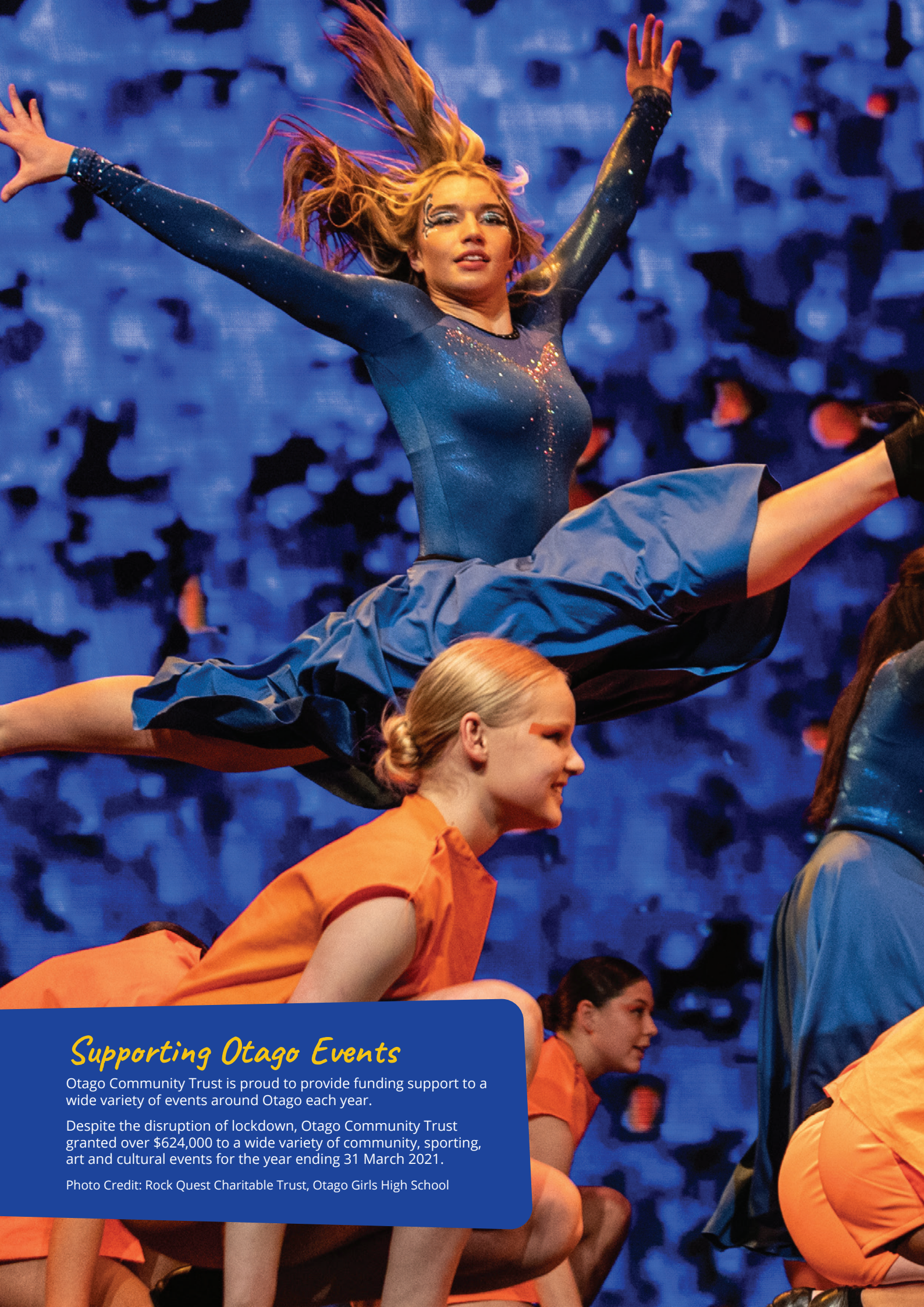
WARDRONA
ALPINE RESORT • NEW ZEALAND

57



OTAGO
Community Trust

ANNUAL REPORT 2020 - 2021



Supporting Otago Events

Otago Community Trust is proud to provide funding support to a wide variety of events around Otago each year.

Despite the disruption of lockdown, Otago Community Trust granted over \$624,000 to a wide variety of community, sporting, art and cultural events for the year ending 31 March 2021.

Photo Credit: Rock Quest Charitable Trust, Otago Girls High School



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Chair and CE Report 2021

Tēnā koutou katoa - greetings to you all.

We are pleased to present the annual report of the Otago Community Trust for the year ended 31 March 2021. The year was not without its challenges to say the least, no one could have predicted that the year would have commenced with the entire nation entering a period of lockdown. While it has been a testing time, it certainly has been a privilege to work through these tough times and see the very best of our communities shine through.

Our Grants for 2020 – 2021

Trustees this year approved grants totalling just over \$8.6m. Grants totalling \$710,000 were granted out of our dedicated COVID-19 Response Fund, helping largely social service and welfare agencies support those most in need in our communities.

We are proud to have maintained steadfast funding support to our regional sport bodies and social service agencies throughout the turbulent year, conscious of the fact that other funders had to postpone and reduce funding commitments, due to the impact of COVID-19.

As New Zealand's COVID-19 elimination strategy took hold the Trust was pleased to see regular granting activity resume and made several significant grants to community organisations across the region. We are pleased to have supported the Clutha Parks Trust with a \$300,000 grant to assist with the development of Naish and Centennial Park destination playground; a \$180,000 grant was awarded to the Harington Point Community Society Inc to support the Te Rauone Beach project and Friends of Alps 2 Ocean Incorporated received a \$177,297 grant to construct the long-awaited clip-on bridge for Awahokomo Stream, making the ride more enjoyable and safer for all. Our long-standing commitment to insulating homes across Otago continued with \$250,000 granted to Cosy Homes Charitable Trust to support the Warmer Kiwi Homes Otago programme.

Investment and Strategic Focus

From an investment perspective it has been a positive year for Otago Community Trust's investment portfolio, the sharp contraction experienced in the final quarter of 2020 was not sustained resulting in an impressive overall investment return of 21.8%. On 31st March 2021 Trust funds were valued at \$319.3m up from \$270.7m in 2020. With the Trust being in such a healthy reserving position our expectation is that we will be able to support bold, innovative and transformative community projects that are aligned to our Strategic priorities and outcomes.

We are also pleased to report that the board undertook a strategy refresh at the end of 2020 with the aim of sharpening our strategic intention and to clarify the Trust's priority communities. Our refined strategic focus aims to cement our priorities and outcomes into four core areas that now give direction to our work from 1 April 2022. These areas are: Empowered Communities, Improved Health and Wellbeing, Increased Access to Opportunities and Thriving Children and Young people. Our priority communities being Children and Young people, Māori, Pasifika, former refugees, new migrants, Rainbow communities, those experiencing mental health issues, people living with a disability, rurally or in isolation and those facing hardship.

We are now underway working on implementing this refresh, having employed a dedicated Community Engagement Advisor, Liz Harburg to work alongside community groups and to support the promotion of innovative ideas and projects.

Appointments

Over the year the Trust welcomed three new trustees. Dr Michael Stevens, Rebecca Williams, and Raewyn van Gool joined the board in early September 2020. The new trustees replaced Kate Hazlett, Ross McRobie and John Wilson who stepped down from the Trust after completing their trustee terms. Michael, Rebecca and Raewyn bring an excellent blend of skills, experience and community connections to the Trust's board table. The contribution made by all three retiring Trustees during their terms was very much appreciated.

The last 12 months have been a testing time for all our communities and challenges will remain for the foreseeable future as we navigate through the economic and social impacts of the COVID-19 crisis. However, Otago Community Trust ends the 2021 year in good heart and as we move forward with a renewed strategic focus, we wish to assure all our communities that our trustees and staff will continue to work hard to ensure we are well placed to meet the diverse needs of all our Otago communities.

Ngā mihi nui

Diccon Sim
Barbara Bridger



Our Team

Trustees



Diccon Sim
Chair / Greater
Dunedin



Barb Long
Deputy Chair /
Greater Dunedin



Dr Michael Stevens
Greater Dunedin



Malcolm Wong
Greater Dunedin



Gina Huakau
Greater Dunedin



Philippa Laufiso
Greater Dunedin



Haley van Leeuwen
Greater Dunedin



Rebecca Williams
Central Otago



Raewyn van Gool
Central Otago



Kevin Malcolm
North Otago



Bridget Tweed
South Otago

Trust Staff



Barbara Bridger
Chief Executive



Sue Stewart
Grants Manager



Karyn Molloy
Finance and Office
Manager



Teresa Christie
Administration
Officer



Mel McAtamney
Communications
& Marketing
Coordinator



Liz Harburg
Community
Engagement Advisor

Investment Highlights



\$319m

Value of the trust funds as at 31 March 2021



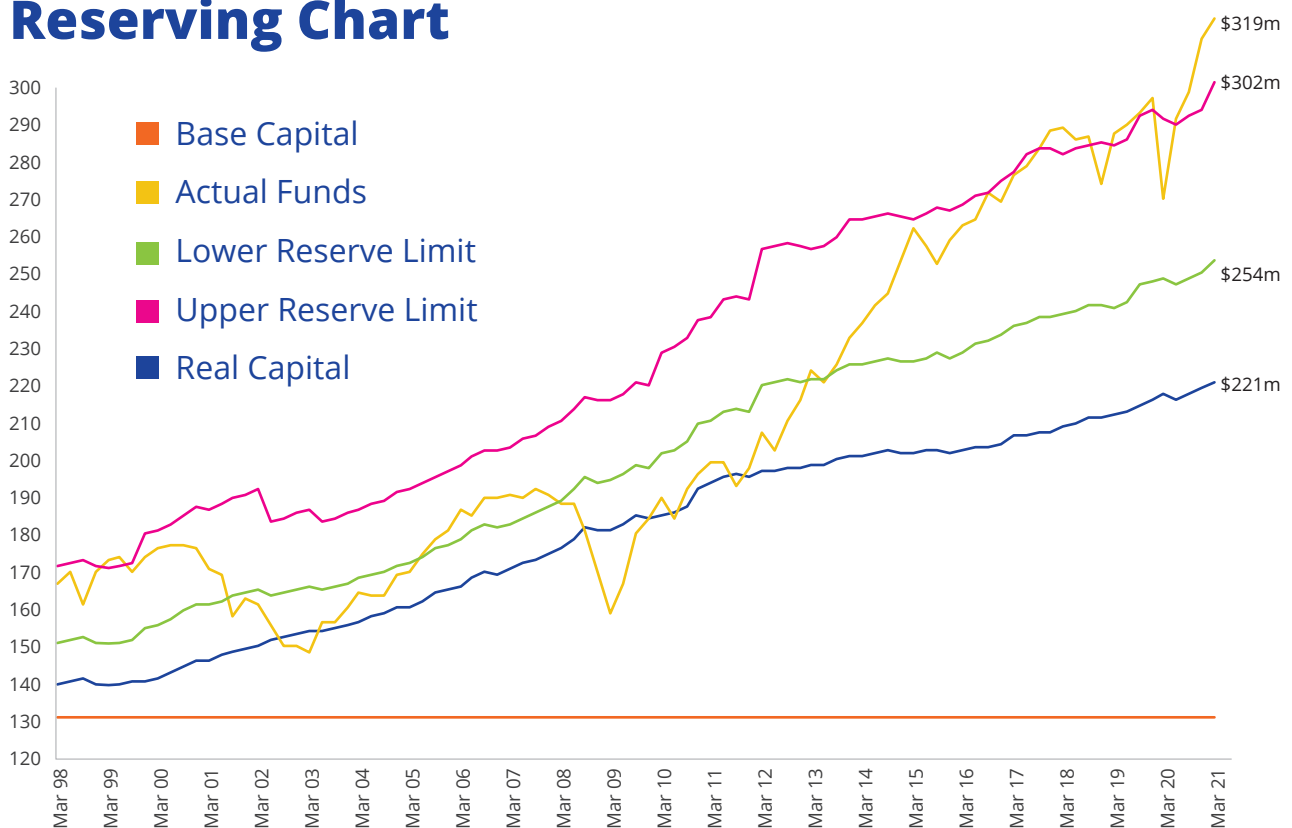
21.8%

Return on Investment as at 31 March 2021



- **7%** New Zealand Shares
- **38%** Overseas Shares
- **43%** Overseas Bonds
- **9%** New Zealand Fixed Interest
- **3%** New Zealand Cash

Reserving Chart



Funding Highlights



\$8.6m

Total Grants Approved
2020-21



395

Total Number of
Community Groups Funded



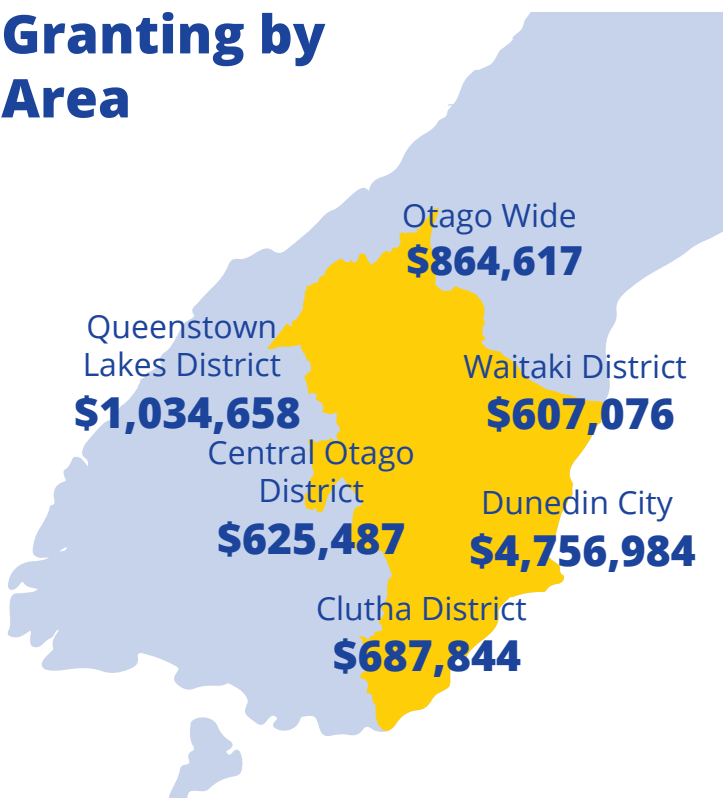
\$188m

Funding approved across
Otago since inception in 1988



- **7%** Arts & Culture
- **7%** Environment & Heritage
- **23%** Learning
- **19%** Sport & Recreation
- **44%** Community

Granting by Area



Strategic Priority Grants



\$197,297
for Tracks
and Trails
Development

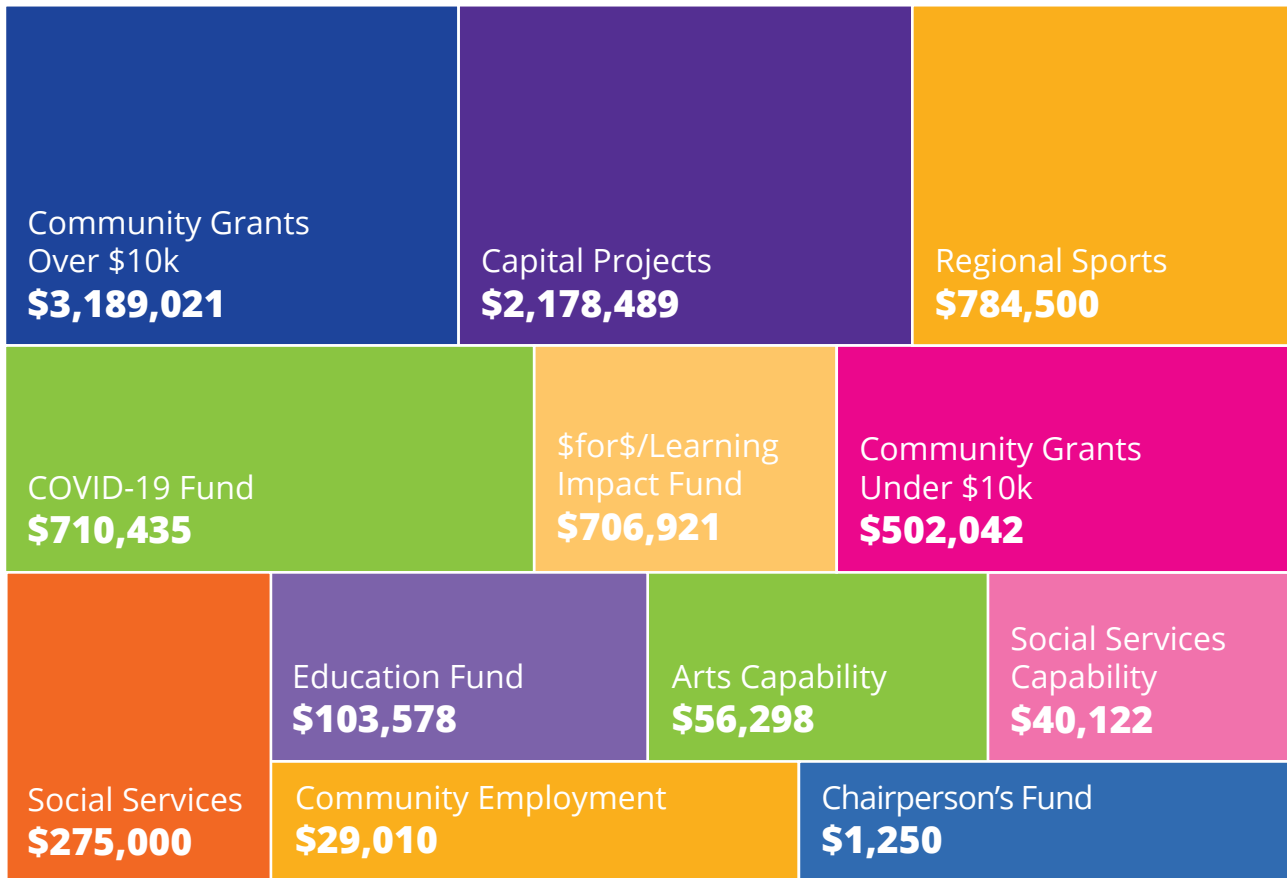


\$265,000
Invested in
Warm Homes
Programme



Over \$1.5m
Invested into
Child & Youth
Wellbeing

Granting by Application Type



The Lake Dunstan Trail was officially opened to the public on Saturday, 8 May 2021.

The \$26 million New Zealand Cycle Trail Project was funded by Government, Central Lakes Trust and Otago Community Trust.

This spectacular trail is set to become an iconic cycling day trip that extends the already fabulous cycle trail options in Central Otago.

Photo Credit: Clare Toia-Bailey, Image Central

COVID-19 Support

On the 25th of March 2020 at 11:59pm, New Zealand moved to Alert Level 4, and the entire nation went into lockdown.

This was an unprecedented time in New Zealand history and a key focus for Otago Community Trust was reacting quickly to support community organisations delivering services to members of the community most in need.

Otago Community Trust earmarked a separate response fund outside of our regular granting budget to support community organisations and not for profit bodies through the COVID-19 crisis.

“ With support from the COVID-19 Response Fund we were able to employ a second dedicated triage staff member to support the Helpline Counselling team during peak times.

In April 2020, our client interactions increased 105% above usual levels and support for mental distress increased 68%.

This allowed us to safely manage the increased volume of work that resulted from COVID-19.

Many thanks to the Otago Community Trust for their critical support in helping us keep our community safe.

Brian Lowe | General Manager
Youthline Otago Southland

“ A huge thank you to the Otago Community Trust for providing Otago councils with much needed funds – here in Waitaki it will be tagged to Welfare needs.

Waitaki District Council

“ “A big Pillars shout out to Otago Community Trust for reassuring us they were there for us during this very difficult time.

Your urgent response to our application was amazing. We can't thank you enough for your integrity and belief in our work and wanting to make a genuine difference to the babies, children and whanau in your region.

Ehara koe i a ia! Pillars New Zealand

“ Many thanks from the artists at Studio 2 for the grant to buy materials to make up artists packs to use during lockdown. Everyone really appreciated getting the packs and made some great art.

Kind regards, Everyone at Studio 2



\$710k

Approved for COVID-19 Relief Funding



44

Total Number of Community Groups Awarded COVID-19 Funding



\$125,000

Awarded to territorial local authorities to support regional COVID-19 Relief



Studio 2 Artwork donated to Otago Community Trust

Our Grantees



Photo Credit: Dominic Godfrey, Radio New Zealand

Oamaru Pacific Island Community Inc

Location: **Oamaru**
Sector: **Community**
Grant: **\$20,000**

The Oamaru Pacific Island Community Group are the driving force behind quality community-led, Pacific focused service provision within the Waitaki Pacific community. With more than 200 Pasifika families moving to the town in recent decades, Oamaru has one of small-town New Zealand's fastest-growing Pacific communities.

When COVID-19 hit, already vulnerable members of the Pacific community found themselves in even more of a precarious position. However, through long standing and established relationships over the past 25 years the Oamaru Pacific Island Community group could offer support in a way that strengthened the Pacific community during the Covid lockdowns, respecting peoples mana and identity.

The Oamaru Pacific Island Community Group played a leading role as a communication conduit for the Pacific community in Waitaki in collaboration with Safer Waitaki, Waitaki District Council, Ministry of Social Development and the Ministry of Education.

COVID-19 funding from Otago Community Trust provided financial support to help cover elements of the additional programme costs associated with

"It was vital that our families received up to date information and got the support that they needed to deal with the ongoing impact of COVID-19. Drawing on our cultural values and strengths, we moved into action immediately and operated beyond our usual level for months to come."

Pacific COVID-19 Coordinator
Mrs Silou Temoana

keeping families up to date, supporting dedicated Pacific COVID-19 Coordinator Mrs Silou Temoana to reach out to those most in need.

"Silou was able to undertake extensive qualitative research of our community with support of the OCT funding provided, this meant that over 100+ families representing approximately 500 individuals were able to share their experiences of lockdown and the immediate challenges they faced" said Hana Halalele from the Oamaru Pacific Island Community Group.

This research really highlighted the various inequities that the Pasifika community face and subsequently has allowed the Oamaru Pacific Island Community Group to work closer with government and social service welfare agencies to not only increase awareness of these areas but also put support and programmes in place to address these.

"Increasing first home ownership for families, tackling the digital divide families face and improving accessibility to quality health care are now three core areas of focus for the future."

Oamaru Pacific Island Community,
Hana Halalele



The 450+ volunteers that help STOP each year now find their work easier with the motorised wheelbarrows and the tools used to cut out pest plants and prepare the ground for planting in the Smiths Creek Catchment.

Save the Otago Peninsula

Location: Dunedin
Sector: Heritage and Environment
Grant: \$17,800

Save the Otago Peninsula (STOP) is a community based environmental group that actively undertakes habitat enhancement, advocacy and education for the unique biodiversity of the Otago Peninsula. The organisation was formed in 1980 in response to the possible construction of an aluminium smelter at Okia Flats, as an alternative site to Aramoana, at the entrance to the Otago Harbour.

Wild Dunedin’s “Wild Hero 2020” and recipient of a Queens Birthday MNZM honour, Lala Frazer is one of the founding members of STOP and is currently one of the project managers behind one of the native plant revegetation projects.

The Smiths Creek Catchment at the base of Hereweka Harbour Cone is one of STOP’s current focuses, with Tuesday and Sunday working bee groups planting and maintaining what will become a “future forest” for generations to come.

Watch the STOP video [HERE](#)

Otago Community Trust was pleased to support Lala and her dedicated team of volunteers in 2020 awarding a \$17,800 grant to help with the purchase of new equipment. The motorised wheelbarrows better support volunteer activities and ensure conservation work on the Peninsula continues. The grant also assisted with the purchase of a dedicated container shed to store all the groups equipment and planting gear, replacing an open leaking shed that did not provide security for tools.



Save the Otago Peninsula


6,282
 Volunteer Hours.


3,936
 Hours spent on revegetation.


1,254
 Hours spent on pest plant control.

Since 2013 at Smiths Creek alone, between 600 and 1,800 trees have been planted and maintained each year, with the high survival rate of 95-98%.



Blessed Box Charitable Trust

Location: **Milton**
Sector: **Community**
Grant: **\$8,000**

Otago Community Trust was delighted to be one of the first funders to provide support to the newly established charitable trust 'Blessed Box' in December 2020. An \$8,000 grant was awarded to support the newly established charity who are focused on trying to assist as many new mums as they can in the Clutha District.

The charity has been overwhelmed by all the supporters and volunteers. Blessed Box have been working towards hosting a cooking session each month in 2021 to ensure that they can distribute "curated" food boxes to new mothers in Clutha.

Each blessed box the charity produces contains a prepared family meal, cupcakes and a breastfeeding/ sleep deprivation snack pack for a mother with a new baby.

The very first cooking session at the Tokomairiro High School's food technology suite saw 15 meals prepared for new Clutha mums with a lot of the produce kindly donated by the local community and businesses in the district.

Since February, a further 50 blessed boxes have been delivered to new Clutha mums. It is heart-warming to see new charities being established in the Otago region to support such worthy causes.

Watch the Blessed Box video [HERE](#)

"Blessed Box was born out of a desire to provide better support to mothers during the first six weeks postpartum, as this can be a particularly challenging time in a mother's life."

"Sleep deprivation, breastfeeding challenges, hormonal, relational and environmental changes are just some of the challenge's mothers experience during this time."

Blessed Box co-founder Olivia Mathieson



*Nā tō rourou, nā taku rourou ka ora ai te iwi
With your food basket and my food basket the people will thrive*

Blessed Box Charitable Trust



65

Blessed Boxes delivered to South Otago mothers.



80

Volunteers Helpers.



402

Cupcakes made.

"Journeys has really exceeded all our expectations, our daughter has gained so much from this experience, and she is really excited to continue."

Parent Feedback



Photo Credit: Clare Toia-Bailey, Image Central

Journeys Charitable Trust

Location: Alexandra
Sector: Sport and Recreation
Grant: \$12,860

"Getting out amongst nature is a powerful tool for growth and self-confidence."

Journeys is focused on connecting girls in local wild places in Central Otago. This unique programme focuses on empowering young Central Otago girls aged 12-15 through outdoor adventure and physical activity in their local wilderness. The programmes run for two hours once a week in local wild places on mountain bike and on foot.

Instrumental to the success of Journeys is collaboration. Journeys co-founder Megan Longman highlights that the programme success is all about collaboration within our community, including our funders but between our schools, girls and their whānau, alongside our inspiring and dedicated local women.

Due to COVID-19, the programme was put on hold in early 2020 however this lockdown period was used wisely to share ideas and discuss how the programme could be further developed.

"My instructors were amazing they helped so much and were super encouraging which made me do better than I thought I could".

"You get to be outdoors with your friends without having to worry about being judged. It's also just nice to be able to have some fresh air and exercise while enjoying yourself."

Student Feedback

"The energy and passion you put into this venture is astounding and our community is unbelievably fortunate to have access to what you deliver. As a teacher of a number of girls who have been part of Journeys for a number of years, I see the massive growth in their self-esteem, confidence and courage to take risks which, by the way, are not always physical ones."

Central Otago School Teacher

To date a total of 55 girls have participated in the Journeys programme gaining skills about navigation, route-finding and taking care of themselves in the outdoors and more importantly building self-confidence and resilience for the future.

Journeys Charitable Trust



16

Volunteer Instructors.



1,000+

Volunteer Hours.



61

Mountain Bike Adventures.



Photo Credit: Andy Thompson

Dunedin Youth Orchestra

Location: **Dunedin**
Sector: **Arts & Culture**
Grant: **\$10,000**

The Dunedin Youth Orchestra (DYO) is Dunedin's premier amateur orchestra for young classical musicians.

The DYO is made up of up to 50+ talented young musicians. Auditions are held at the start of each year to provide youth aged between 13 and 25 years with an opportunity to develop their abilities within an orchestra. Through weekly rehearsals and a weekend workshop each semester, the orchestra is then trained by professional conductors and tutors in all aspects of orchestral preparation and performance.

Otago Community Trust has for several years provided funding to assist with the cost of the Orchestra programme. This investment provides a pathway for talented Otago youth to develop their orchestral skills and realise their dreams.

"Dunedin Youth Orchestra provides an excellent training ground for instrumentalists to develop their orchestral skills. Many past members are now playing in professional orchestras around New Zealand, including Dunedin's own Dunedin Symphony Orchestra and the New Zealand Symphony Orchestra."

Rebecca Meikle, Secretary, Dunedin Youth Orchestra

"As the only youth audition orchestra in all of Otago the DYO is the only place that provides the necessary space to grow as a young musician. The requisite standards, not only musically, but behaviourally train the students to become engaged and professional classical musicians. The weekly rehearsals, sectional tutoring, and performances each contribute to growing the young people as musicians, but the service opportunities, and offstage committee work really trains them to participate in community."

"The DYO is an invaluable asset to all of Otago from the very young to the aged and in between. It inspires, delights, and binds our community."

Parent of player in the Dunedin Youth Orchestra

Dunedin Youth Orchestra



82

Rehearsal Hours.



2,500

Volunteer Hours.



62

Young Musicians Supported.

"Thank you very much for an amazing first semester, it has been awesome being part of DYO so far and I'm very excited for the next!" **Young Musician.**

Grants List

Central Otago District	
Alexandra Baptist Church	\$25,000
Alexandra Blossom Festival Inc	\$11,000
Alexandra Community House Trust	\$31,350
Alexandra Elim Church Trust	\$4,400
Alexandra Petanque Club Inc	\$4,000
Alexandra Primary School	\$244,167
Alexandra Primary School Charitable Trust (COEC Ltd)	\$15,000
Alexandra Squash Rackets Club Inc	\$11,800
Central Otago A & P Association	\$3,185
Central Otago Budgeting Services Inc	\$9,810
Central Otago District Council	\$25,000
Central Otago Ecological Trust	\$3,000
Central Otago Friendship Network	\$2,400
Central Otago Hockey Assn	\$10,000
Central Otago Regional Choir	\$2,500
Central Otago Riding for the Disabled Association	\$6,500
Central Otago Victim Support Local Group Committee	\$1,500
Clyde Pony Club	\$800
Clyde Primary School	\$640
Cromwell Bike Park Inc	\$30,000
Cromwell College	\$11,509
Cromwell Early Learning Centre Inc	\$6,500
Cromwell Primary School	\$1,055
Cromwell Scout Group	\$500
Cromwell Youth Trust	\$25,000
Dunstan Arm Rowing Club Inc	\$6,500
Dunstan Equestrian Centre	\$5,000
Dunstan High School	\$390
Goldfields School	\$1,125
Journeys Charitable Trust	\$12,860
Mainland South BMX Assn Inc	\$12,000
Maniototo Area School	\$3,206
Millers Flat Baths Inc	\$4,000
Millers Flat School	\$5,000
New Zealand Olympic Luge Assn Inc	\$4,000
NZ Curling Assn Inc	\$9,000
Omakau School	\$630
Poolburn School	\$540
Roxburgh Entertainment Centre Improvements & Promotions Inc	\$6,000
St Bathans Area Community Association Inc	\$3,000

St Johns School	\$3,000
Sticks 'n Stones Inc	\$45,000
The Terrace School	\$4,620
Under Rough Ridge Writers' Trust	\$3,000
Upper Clutha Tracks Trust	\$10,000
Total Central Otago District	\$625,487
Clutha District	
Balclutha Parents Centre	\$700
Balclutha Pipe Band	\$1,700
Balclutha Primary School	\$5,141
Blessed Box Charitable Trust	\$8,000
Catlins Medical Centre (2017) Ltd	\$5,000
Clinton Community Centre Inc Soc	\$16,000
Clutha District Council	\$25,000
Clutha Parks Trust	\$300,000
Clutha Valley Primary School	\$4,698
Kaitangata & District Promotions Inc	\$25,000
Kaitangata Primary School	\$2,740
Lawrence Gymkhana Club	\$4,000
Life Education Trust Heartland Otago Southland	\$10,000
Milton Community Health Trust	\$31,000
Milton Primary School	\$8,700
Otago Organics	\$654
Our Hut Heritage Hub	\$1,247
Owaka Swimming Baths Committee Inc	\$116,850
Rosebank Primary School	\$800
South Otago Agricultural & Pastoral Soc	\$1,000
South Otago Free Kindergarten Association Inc	\$53,071
South Otago High School	\$25,920
St Marys School Milton	\$1,600
Stirling School	\$1,565
The Clutha Budget Advisory Service	\$4,000
Toko Golf Club	\$5,000
Tokomairiro High School	\$26,637
Waiwera South School	\$1,821
Total Clutha District	\$687,844

Dunedin City	
A3 Kaitiaki Ltd	\$69,000
Able - Southern Families Support	\$67,000
Acts of Kindness Charitable Trust	\$10,000
Ake Ake Theatre Company	\$15,000
Alzheimers Society Otago Inc	\$2,926
Amputee Society of Otago & Southland Inc	\$500
Andersons Bay School	\$5,000
Anglican Family Care	\$21,845
Arcade Theatre Trust	\$10,000
Archibald Baxter Memorial Trust	\$34,450
Aroha Ki Te Tamariki	\$301,141
Arthur Street School	\$550
Arts On Tour NZ	\$9,000
Aspire Kids Tamariki Matanā	\$3,000
Athletics Otago Inc	\$31,000
Balmacewen Intermediate School	\$260
Basketball Otago Inc	\$60,500
Bathgate Park School	\$11,886
Bayfield High School	\$1,315
Bradford Primary School	\$3,808
Brighton Gala Day	\$1,000
Broad Bay School	\$3,200
Brockville School	\$9,570
Cancer Society of NZ Otago & Southland	\$38,036
Carisbrook School	\$58,700
Catholic Social Services	\$65,000
CCS Disability Action Otago Inc	\$18,113
ChatBus Trust	\$25,000
Chisholm Park Golf Club Inc	\$8,000
Columba College	\$65,084
Community Builders	\$20,000
Concord School	\$110
Cosy Homes Charitable Trust	\$250,000
Creative Arts Trust - Artsenta	\$20,000
Cycling Otago	\$7,500
Disability Information Service Inc	\$24,100
Dunedin (NZ) Masters Games Trust	\$100,000
Dunedin Aphasia Support Group	\$1,000
Dunedin Budget Advisory Service	\$7,636
Dunedin Choral Society	\$13,000
Dunedin City Council - COVID-19	\$115,000
Dunedin City Council - Dunedin Cycling Project	\$43,420
Dunedin City Council - Puaka Matariki Celebrations	\$12,500
Dunedin City Jazz Orchestra Inc	\$1,500
Dunedin Civic Orchestra Inc - T/a Dunedin Symphony Orchestra	\$80,000
Dunedin Community Care Trust	\$16,474

Dunedin Community House Trust Inc	\$20,992
Dunedin Community Mediation	\$252
Dunedin Curtain Bank Trust	\$15,000
Dunedin Edinburgh Sister City Society Inc	\$6,000
Dunedin Friend-Link Trust	\$1,500
Dunedin Fringe Arts Trust	\$80,848
Dunedin Ice Hockey Association	\$18,000
Dunedin Ice Skating Club Inc	\$12,500
Dunedin Lawn Bowls Stadium Inc	\$3,000
Dunedin Midwinter Celebrations Trust	\$20,000
Dunedin Netball	\$5,000
Dunedin North Intermediate School	\$600
Dunedin Poultry, Pigeon & Cage Bird Club	\$3,500
Dunedin Repertory Soc Inc	\$2,000
Dunedin Rudolf Steiner School	\$2,986
Dunedin Senior Chinese Assn	\$2,000
Dunedin Tamil Society Inc	\$10,000
Dunedin Youth Jazz Orchestra	\$6,361
Dunedin Youth Orchestra Inc	\$10,000
East Taieri School	\$8,272
Elmgrove School	\$34,097
Fairfield School	\$65,065
Football South	\$77,000
George Street Normal School	\$96,486
Golf Otago Incorporated	\$27,500
Grants Braes School	\$3,706
Green Island School	\$780
Grow NZ Inc - Dunedin Grow Centre	\$500
Halfway Bush Primary School	\$240
Harington Point Community Society Inc	\$180,000
Hawksbury Lagoon Inc	\$1,000
Ice Sports Dunedin Inc	\$15,000
International Festival Environment Science Technology Dun NZ Inc	\$72,150
Kaikorai Grays Sport & Travel Inc	\$1,000
Kaikorai Junior Cricket Club Inc	\$1,260
Kaikorai Kindergarten	\$2,500
Kaikorai Valley College	\$6,835
Karitane Bowling Club Inc	\$4,000
Karitane School	\$500
Kavanagh College	\$22,765
King's High School	\$1,980
Kingslea School - Puketai	\$8,000
Ko Ngā Rourou Manaaki (Baskets of Hospitality)	\$1,000
Leukaemia & Blood Cancer NZ	\$1,000
Liberton Christian School	\$4,640
Life Education Trust Coastal Otago	\$9,200
Life Matters Suicide Prevention Trust	\$17,500
Logan Park High School	\$8,220

Macandrew Bay School	\$3,453
Malcam Charitable Trust	\$84,300
Maori Hill School	\$200
Methodist Mission Southern	\$21,805
Middlemarch Swimming Club Soc Inc	\$10,000
Moana House - Downie Stewart Foundation	\$3,563
Mornington School	\$22,387
Mosgiel Piping and Dancing Society	\$1,000
Nature School Dunedin	\$2,200
New Edinburgh Folk Club Inc	\$6,000
Northern Junior Association Football Club Incorporated	\$2,000
NZ Chinese Assn of Otago & Southland Inc	\$10,000
NZ Salmon Anglers Assn Otago Branch	\$5,000
Opoho Primary School	\$825
Otago Academy of Sport	\$35,000
Otago Badminton Assn Inc	\$16,500
Otago Boys High School	\$6,247
Otago Chamber of Commerce	\$45,500
Otago Cricket Assn Inc	\$60,500
Otago Festival of the Arts Trust	\$8,500
Otago Fish & Game Council	\$1,733
Otago Girls High School	\$41,738
Otago Golf Club Inc	\$14,500
Otago Hockey Assn (1990) Inc	\$30,000
Otago Medical Research Foundation	\$80,000
Otago Outdoor Education Trust	\$18,000
Otago Polytechnic - College of Community Development and Personal Wellbeing, English Language Centre	\$28,000
Otago Polytechnic - Dunedin School of Art	\$800
Otago Polytechnic - Pacific Island Scholarships	\$10,000
Otago Railway and Locomotive Society Inc	\$40,000
Otago Rowing Association Inc	\$27,500
Otago Rugby Football Union Inc	\$55,000
Otago Rugby League Inc	\$18,000
Otago Secondary Schools Sports Assn	\$28,000
Otago Softball Assn Inc	\$18,000
Otago Table Tennis Assn Inc	\$5,000
Otago Tertiary Chaplaincy Trust Board	\$2,000
Otago Touch Assn Inc	\$40,000
Otago Youth Wellness Trust	\$129,000
Ōtepoti Collective Against Sexual Abuse	\$3,944
Outram School	\$1,170
Parafed Otago	\$22,000
Pillars Incorporated	\$15,000
Pine Hill School	\$43,552
Port Chalmers School	\$80

Portobello School	\$4,646
Pregnancy Help Incorporated Dunedin Branch	\$5,000
Presbyterian Support Otago	\$10,000
Prisoner Aid and Rehabilitation Society - Otago (PARS)	\$5,000
Progress of Waikouaiti Area	\$5,000
Prospect Park Productions NZ	\$6,000
Punga Croquet Club Inc	\$700
Purakaunui School	\$544
Quarantine Island/Kamau Taurua Community Inc	\$5,777
Queens High Preschool	\$13,000
Queens High School	\$6,160
Ravensbourne Primary School	\$8,500
Ravensbourne Youth Yachting Trust	\$8,000
Riselaw Road Playcentre	\$20,000
Roslyn Wakari Association Football Club Inc	\$3,000
Royal NZ Pipe Band Assn - Otago Centre	\$2,000
Ruaimoko Charitable Trust	\$15,000
Sacred Heart School	\$3,000
Saddle Hill Foundation Trust	\$35,000
Saddleview Pony Club	\$2,250
Sara Cohen School	\$78,159
Sathi Association	\$1,000
Saturday Morning Music Classes (Dunedin) Soc Inc	\$5,000
Save the Otago Peninsula (STOP) Society Inc	\$17,800
Servants Health Centre Trust	\$15,000
Showbiz Dunedin Ltd	\$10,000
Silverstream South Primary School	\$30,660
Skeggs Foundation	\$30,800
South Dunedin Community Network Inc	\$1,992
Southern Ice Hockey League	\$2,339
Squash Otago Inc	\$27,500
St Bernadettes School	\$500
St Brigids School	\$11,100
St Clair School	\$530
St Kilda Brass Band Inc	\$3,000
St Marys School - Mosgiel	\$8,425
Stopping Violence Dunedin Inc	\$10,424
Straight Up Trust	\$25,000
Swimming New Zealand	\$20,000
Swimming Otago	\$12,000
Swing Riot Dunedin Incorporated	\$2,000
Tahuna Normal Intermediate School	\$149,778
Taieri Beach School	\$1,423
Taieri College	\$254,205
Taieri Musical Society Inc	\$3,000

Tainui School	\$560
Te Hou Ora Ōtepoti Inc	\$8,690
Te Kura Kaupapa Maori o Ōtepoti	\$3,000
Te Roopu Tautoko Ki Te Tonga Inc	\$20,000
Tennis Otago Incorporated	\$15,000
The Adventures of Angel-Louise & Friends	\$1,000
The Anteroom Arts Charitable Trust	\$6,000
The Brain Injury Assn (Otago) Inc	\$3,000
The Connections Education and Development Trust	\$16,542
The Dunedin Writers and Readers Festival Trust	\$38,000
The Lupe Faalele a Samoa I Otago Inc	\$2,000
The Opera House Trust	\$7,165
The Otago Multiple Sclerosis Society Inc	\$1,386
The Taieri Rugby Football Club Incorporated	\$40,000
The Work Opportunities Trust	\$13,280
Valley Community Workspace Inc t/a Dunedin's Loom Room	\$8,800
Volunteering Otago Trust	\$19,523
Waikouaiti School	\$3,409
Wakari School	\$1,000
Warrington Primary School	\$3,560
West Harbour Arts Charitable Trust	\$2,000
WOW! Productions Trust	\$10,000
Youthline Otago Inc	\$80,000
Total Dunedin City	\$4,756,983



Dunedin Writers and Readers Festival
Photo Credit: Sharron Bennett Photography

Otago Wide	
Adventure Therapy Aotearoa Inc	\$1,165
Anxiety New Zealand Trust	\$5,000

Aphasia New Zealand (AphasiaNZ) Charitable Trust	\$3,000
Blue Light Ventures Incorporated	\$4,557
Catalytic Foundation	\$5,000
Chairpersons Fund	\$1,250
Chamber Music New Zealand Trust	\$7,000
Choirs Aotearoa NZ Trust	\$5,500
Community Employment	\$29,010
Connected Media Charitable Trust	\$7,000
Crohn's & Colitis New Zealand Charitable Trust	\$5,000
Cystic Fibrosis Association of New Zealand	\$1,000
Gymnastics New Zealand	\$7,000
IHC NZ Inc	\$25,000
Kiwi Family Trust	\$2,500
National Rural Health Conference	\$15,000
Netball South Zone Inc	\$60,000
New Zealand Alpine Club	\$100,000
Outward Bound Trust of New Zealand	\$120,000
People First New Zealand Inc	\$2,000
Perinatal Mental Health New Zealand	\$1,188
Rail Heritage Trust of New Zealand	\$12,500
Red Leap Theatre Trust	\$4,500
RMH South Island Trust	\$12,320
Road Safety Education Limited	\$6,000
Ronald McDonald House Charities NZ	\$38,020
Royal New Zealand Ballet	\$7,000
Salvation Army New Zealand	\$47,000
Shakespeare Globe Centre New Zealand	\$4,000
Show Me Shorts Film Festival Trust	\$4,384
Special Olympics New Zealand	\$15,000
SPELD NZ	\$9,000
Sport Otago	\$175,750
Street Smart Charitable Trust	\$9,200
Stroke Foundation of NZ	\$20,000
Surf Life Saving New Zealand Inc	\$18,500
TalkLink Trust	\$4,873
Tangata Whenua, Community and Voluntary Sector Research Centre	\$10,000
The Boys' Brigade in NZ Inc	\$12,000
The National Foundation for the Deaf Incorporated	\$3,000
The Parenting Place - Attitude Youth Division	\$10,000
The Volunteer Army Foundation	\$4,500
Untouched World Charitable Trust	\$6,000
Wellington Community Trust	\$14,000
Wellington Museums Trust Inc	\$3,500
Young and Hungry Arts Trust	\$2,400
Young Workers Resource Centre Inc	\$4,000
Total Otago Wide	\$864,617

Queenstown-Lakes District	
Alpine Community Development Trust	\$40,000
Aspiring Biodiversity Trust	\$12,000
Bike Wanaka Inc	\$10,000
Challenge Wanaka Sports Trust	\$11,750
Hollyford Conservation Trust	\$22,000
Holy Family Catholic School	\$2,250
Mt Aspiring College	\$1,755
NZ Mountain Film Festival Charitable Trust	\$4,010
One New Zealand	\$6,000
Paradise Trust	\$80,000
Plastic Bag Free Wanaka Ltd	\$3,000
Poetic Justice Wanaka	\$1,000
QLDC - New Year's Eve Celebration (ex Summerdaze)	\$5,000
Queenstown Lakes Baby Box Charitable Trust	\$5,000
Queenstown Lakes District Council	\$25,000
Queenstown Lakes District Council - Luggate Hall	\$400,000
Snow Farm NZ Limited	\$140,000
Snow Sports NZ Inc	\$50,600
Southern Lakes Arts Festival Trust	\$65,000
Tarras School	\$3,000
Three Lakes Cultural Trust	\$15,000
Wanaka Arts Society	\$3,000
Wanaka Bowling Club Inc	\$30,000
Wanaka Golf Club Inc	\$10,000
Wanaka Preschool Early Childhood Centre	\$3,904
Wanaka Primary School	\$10,734
Wanaka Riding for the Disabled Inc (RDA)	\$2,300
Wanaka Search and Rescue Inc	\$9,355
Wanaka Tennis Club Inc	\$30,000
Wheels at Wanaka Charitable Trust	\$10,000
Wheels to Dunstan Charitable Trust	\$10,000
Winter Games NZ Charitable Trust	\$13,000
Total Queenstown-Lakes District	\$1,034,658



NZ Curling Assn Inc

Waitaki District	
CCS Disability Action Waitaki Inc	\$18,070
Cycling Waitaki Inc	\$1,867
East Otago High School	\$1,185
Eastern Districts Sports Assn Inc	\$2,000
Fenwick School	\$4,979
Friends of Alps 2 Ocean Incorporated	\$177,297
Friends of the Forrester Gallery Society Inc	\$25,000
Harbour Street Jazz Incorporated	\$7,800
Janet Frame Eden Street Trust	\$3,000
Kakanui School	\$1,650
Lower Waitaki Golf Club Inc	\$7,000
Macraes Moonlight School	\$1,842
Meadowbank United Football Club Incorporated	\$1,000
New Zealand Deerstalkers Assn (North Otago Branch) Inc	\$15,000
North Otago Primary Principals Assn	\$5,000
North Otago Rugby Football Union Inc	\$22,000
North Otago Sports Bodies Association Incorporated	\$1,500
Oamaru Combined Churches Christmas Parcels Trust	\$2,000
Oamaru Multisport Club	\$2,000
Oamaru Pacific Island Community Inc	\$20,000
Oamaru Victorian Heritage Celebrations Committee	\$8,000
Oamaru Whitestone Civic Trust	\$12,000
Omarama Gliding Club Inc	\$10,000
Otematata Residents Assoc Inc	\$12,000
'Our Hub' Oamaru Creative Arts Space	\$980
Palmerston Primary School	\$408
Pembroke School	\$10,400
St Josephs School - Oamaru	\$12,850
St Kevins College	\$9,600
Te Pakihi o Maru	\$3,773
Waitaki Boys High School	\$102,000
Waitaki Community Gardens Trust	\$5,000
Waitaki District Council	\$25,000
Waitaki District Council - Community Events	\$5,675
Waitaki District Council - Oamaru Public Garden & Playground	\$56,000
Waitaki Endurance & CTR Club Incorporated	\$13,200
Total Waitaki District	\$607,076
Total Grants Approved 2021	\$8,576,666
LESS	
Grant Writebacks	\$279,075
DCC Arts Capability Reimbursement	\$29,149
	\$8,268,442

Financials

Otago Community Trust Directory

For the year ended 31 March 2021

Trustees

Diccon Sim (Chairperson)	Dunedin
Gina Huakau	Dunedin
Philippa Laufiso	Dunedin
Barb Long	Dunedin
Kevin Malcolm	Oamaru
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 2021
in New Zealand Dollars (\$'000's)

	2021	2020
Gains/(losses) from investments	57,927	(4,281)
Expenditure	(1,151)	(1,278)
Surplus / (Deficit) before grants	56,776	(5,559)
Grants approved during the year	(8,268)	(11,534)
Surplus / (Deficit) before taxation	48,508	(17,093)
Income tax (expense)/refund	-	-
Surplus / (Deficit) for the year	48,508	(17,093)
Other comprehensive revenue and expenses	-	-
Total comprehensive revenue and expenses for the year	48,508	(17,093)

Summary consolidated statement of changes in trust funds

For the year ended 31 March 2021
in New Zealand Dollars (\$'000's)

	2021	2020
Total trust funds at the beginning of the year	270,707	287,800
Plus total comprehensive revenue and expenses for the year	48,508	(17,093)
Total trust funds at the end of the year	319,215	270,707



Aspiring Conversations, 2021 'Windows over Wanaka'.
Photo Credit: Ray Tiddy

Summary consolidated statement of financial position

As at 31 March 2021
in New Zealand Dollars (\$000's)

Assets	2021	2020
Cash and cash equivalents	915	1,138
Other current assets	36	26
Total current assets	951	1,164
Other investments	325,554	278,221
Property, plant and equipment	1,480	1,519
Total non-current assets	327,034	279,740
Total assets	327,985	280,904
Liabilities	2021	2020
Trade and other payables (including grants)	7,985	8,862
Total current liabilities	7,985	8,862
Trade and other payables (including grants)	785	1,335
Total non-current liabilities	785	1,335
Total liabilities	8,770	10,197
Net assets / Trust Funds	319,215	270,707

Approved on behalf of the Trustees



R.J.M. (Diccon) Sim
Chairperson
22 June 2021



Barb Long
Deputy Chair
22 June 2021

Summary consolidated statement of cash flows

For the year ended 31 March 2021
in New Zealand Dollars (\$000's)

	2021	2020
Net cash outflow from operating activities	(10,718)	(9,910)
Net Cash from/(used) in investing activities	10,495	10,016
Net cash from/(used) in financing activities	-	-
Net (decrease)/increase in cash and cash equivalents	(223)	106
Cash and cash equivalents at 1 April	1,138	1,032
Cash and cash equivalents at 31 March	915	1,138

Notes to the summary consolidated financial statements

For the year ended 31 March 2021

These are the summary consolidated financial statements of Otago Community Trust (the "Trust") for the year ended 31 March 2021.

The specific disclosures included in these summary consolidated financial statements have been extracted from the full annual consolidated financial statements dated 22 June 2021. The full annual consolidated financial statements were approved for issue by the Trustees on 22 June 2021 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 2021. A copy of the full Trust consolidated financial statements for the year ended 31 March 2021 may be obtained by contacting the Trust on (03) 479 0994.

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 22 June 2021.

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.

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.

Deloitte.

Independent Auditor's Report on the Summary Consolidated Financial Statements

To the Trustees of Otago Community Trust

Opinion

The summary consolidated financial statements of Otago Community Trust (the 'entity') and its subsidiaries (the 'Group'), which comprise the summary consolidated statement of financial position as at 31 March 2021, and the summary consolidated statement of comprehensive revenue and expense, summary consolidated statement of changes in trust funds and summary consolidated statement of cash flows for the year then ended, and related notes, are derived from the audited consolidated financial statements of the Group for the year ended 31 March 2021.

In our opinion, the accompanying summary consolidated financial statements, on pages 20 to 22, are consistent, in all material respects, with the audited consolidated financial statements, in accordance with PBE FRS 43: *Summary Financial Statements* issued by the New Zealand Accounting Standards Board.

Summary consolidated financial statements

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

The audited consolidated financial statements and our report thereon

We expressed an unmodified audit opinion on the audited consolidated financial statements in our report dated 22 June 2021.

Trustees responsibilities for the summary consolidated financial statements

The Trustees are responsible on behalf of the Group for the preparation of the summary consolidated financial statements 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 statements are consistent, in all material respects, with the audited consolidated financial statements based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) ('ISA (NZ)') 810 (Revised): *Engagements to Report on Summary Financial Statements*.

Other than in our capacity as auditor, the provision of taxation advice and the provision of a fraud training workshop, we have no relationship with or interests in the entity or any of its subsidiaries. These services have not impaired our independence as auditor of the entity and Group.

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
22 June 2021**



Facilities for the Future

Otago Community Trust provided over \$2m in grants to the learning sector for the year ending 31 March 2021. The overwhelming majority of this funding (88%) supports Otago primary and secondary schools invest in technology, equipment alongside new facilities such as artificial turfs and bike and scooter tracks.

Elmgrove School in Mosgiel was one such grant beneficiary receiving a \$30,000 grant to create a new bike and scooter track on the perimeter of the school grounds.

Photo Credit: Mel McAtamney

Snow Sports New Zealand Junior Freestyle Nationals

The front and back cover image is from Snow Sports New Zealand Junior Freestyle Nationals held in October 2020. Held at Cardrona Alpine Resort, the event attracts over 250 competitors and involves around 100 staff, supporters and volunteers.

The event provides a pathway for developing snow sports athletes in New Zealand. It is an ideal platform for junior athletes to gain important competition experience critical to continued career growth.

Photo Credit: Ross Mackay



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