



## ASB Community Trust

Te Kaitiaki Putea o Tamaki o Tai Tokerau

supported by ASB



# TRUSTLINE

JUNE 2010



3



### From the CEO's desk:

Welcome to the June edition of TrustLine which is our opportunity to share with you the latest developments at the Trust as we continue to refine our efforts to enhance the communities of Auckland and Northland.

You can read about the new funding policy for our Arts and Culture sector and our Māori Strategy. We've also introduced a "quick response" application process for projects such as playgrounds, school libraries and sports clubs.

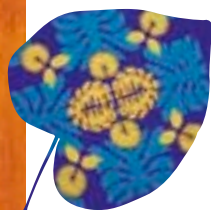
CONTINUED ON PAGE 2

"It is life-changing work that we do and we could not do it without the support of organisations such as ASB Community Trust."

*Raukatauri Music Therapy Centre*

### INSIDE

- 1 CEO welcome
- 2 Trust's finances recover  
Public meeting dates confirmed
- 3 Funding for arts and culture groups explained  
Social issues in the new super city
- 4 Attention recreation, sport and learning organisations  
Trust commits to Māori strategy
- 5 Grants support environmental work
- 6 Recreation & Sports grants explained
- 7 Squash celebrates strong growth  
New Trustees appointed  
'Catalytic philanthropy' drives US
- 8 Applying for a grant?



### From the CEO's desk, continued:

Elsewhere in *TrustLine* we follow up on a few of our recent grants in the environment and recreation sectors and find out what those organisations are doing to make our region a better place to live.

On page 7, two of our staff share their thoughts from a recent philanthropy conference in the US they attended, where they were impressed by the scale of US giving, but confident that philanthropy in New Zealand still measures up well

We are pleased to introduce to you four new trustees who have just been appointed to the board and also delighted to be able to report that the Trust's finances are much healthier again and the Trust's grants budget is back to normal. See the adjoining article.

*Jennifer Gill*  
Trust CEO



## Trust's finances recover

The Trust has now recovered from the effects of the 2008/09 global financial meltdown and the grants process has returned to normal.

The Trust enjoyed a 28.2% return on investments, or \$236 million, for the year to March 31, 2010. This was the highest percentage return ever, although it was off a low base because the value of investments fell below \$800 million the previous year.

During the financial turmoil the Trust remained confident of the underlying value of its investments and no changes were made to the investment profile. Asset values rose as markets recovered.

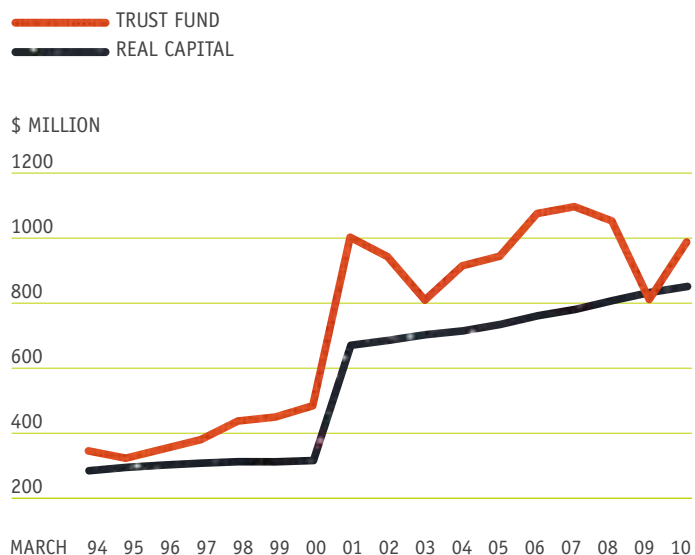
As a result, Trustees have decided to set a \$45 million grants budget for the year through to March 31, 2011. This will be distributed across the 10 funding sectors, including Community Building Projects, where the Trust helps with capital building costs for community projects.

Returns on investments remain vital for the Trust's operations because the revenue stream funds the grants budget. Work is now underway to smooth out the effects of market fluctuations so a stable grants budget can be guaranteed from year to year.

The Trust has contracted international investment advisor Cambridge Associates to help guide investment decisions. Cambridge Associates has already begun work to benchmark the Trust's returns against similar institutions around the world and help set up systems to remove short-term volatility from the grants budget.

 [cambridgeassociates.com](http://cambridgeassociates.com)

### ASB Community Trust reserve position





## Funding for arts and culture groups explained

Arts and culture groups now have more details about what grants they can apply for.

After a recent review of funding policy for the sector, the Trust's website explains how Arts & Culture grants now fall into three broad areas: general support; community arts funding and minor building projects.

In assessing all applications we will be looking for evidence that the project will help people access, engage with and experience the arts. We ask applicants to show us that the community needs the project. We'll also want to know what other funding you have in place.

Under general support funding, grants are made for operating costs, equipment, websites and IT requirements, as well as project costs.

Community arts funding makes grants of up to \$10,000 available for organisations that are encouraging arts access, engagement and experience. Grants can help with community



The Trust supports arts access, engagement and experience

arts festivals and arts projects, equipment and materials, venue hire, exhibitions and performance costs.

The third area of funding is for minor building projects, where up to \$50,000 is available for community arts organisations trying to improve access, engagement and experience of the arts. Grants can be for building maintenance and upgrades, or modifications for health and safety reasons. Groups can apply for minor building project grants once every three years.

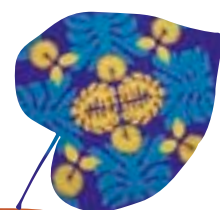
Any building applications for \$50,000 or more are considered under the Trust's Community

Building Projects fund. This is a separate year-long process which begins with an expression of interest on February 1 each year.

For the Arts & Culture applications there are two closing dates a year: April 1 and September 1 and applicants are told the results three months later.

Read more about Arts & Culture grants: [www.asbcommunitytrust.org.nz/funding/what-we-fund/arts-and-culture](http://www.asbcommunitytrust.org.nz/funding/what-we-fund/arts-and-culture)

Read more about Community Building Project grants: [www.asbcommunitytrust.org.nz/funding/what-we-fund/community-building-projects](http://www.asbcommunitytrust.org.nz/funding/what-we-fund/community-building-projects)



### Public meeting dates confirmed

The Trust holds its 2010 Auckland public meeting on Monday, August 2, and in Whangarei on Saturday, September 4.

Planning is underway to include funding fairs at both meetings, with a range of grantmakers represented so not-for-profit representatives will be able to find out about funding options.

The Auckland meeting, which will be held at Pt Chevalier's Te Mahurehure Marae on

the afternoon of August 2. In Whangarei the Trust will hold its annual public meeting at the ASB Leisure Centre on the afternoon of September 4.

Following the funding fairs, ASB Community Trust will hold its annual public meeting to present investment and funding results for the year and to talk about plans for the year ahead.

Our Trustees will attend both meetings and, as always, they will be available to talk one-on-one and hear about work being done in the community.

### Meeting Dates

Auckland  
Te Mahurehure Marae  
Pt Chevalier  
August 2

Whangarei  
ASB Leisure Centre  
September 4





## Attention recreation, sport and learning organisations

Quick-response grants have been introduced for fund-seekers working in the Recreation & Sport and the Learning sectors.

The usual closing dates apply, but you will get a grant decision within six weeks, instead of the 3-4 month wait for larger applications.

Under the quick-response grants scheme early childhood sector groups can apply for up to \$20,000

to upgrade facilities. All schools up to and including intermediate can apply for up to \$10,000 for play equipment and outdoor area upgrades, including shade sails. Primary and intermediate schools can apply for up to \$10,000 to buy library books and equipment. Meanwhile, primary, intermediate and secondary schools can apply for up to \$5000 for one-off environmental projects.

The scheme also works for students with special needs. Quick-response grants of up to \$10,000 can help with equipment and resources for schools and community organisations that have a specific focus on students

with special needs at all levels of learning. Meanwhile, community organisations working in the learning sector can apply for up to \$10,000 to assist with equipment and resources.

In the Recreation & Sport sector the quick-response grants are targeted at encouraging participation by younger and older people. Grants of up to \$10,000 are available for initiatives that aim to overcome barriers to participation.

Costs can include sports equipment and uniforms for juniors; venue costs such as lane hire; access such as transporting junior members where isolation is a barrier to participation; and safety.

Applying for a quick-response grant can also mean that financial reporting requirements are simpler.

Read more about this at

[www.ASBCommunityTrust.org.nz/news-publications/press-release-archive/quick-response-grants](http://www.ASBCommunityTrust.org.nz/news-publications/press-release-archive/quick-response-grants)



Schools can apply for funding for play equipment



## Trust commits to Māori strategy

A commitment to work with and for the Māori community is now an integral part of the Trust's strategic plan.

Trustees have approved an ASB Community Trust Māori Strategy, which makes helping Māori communities achieve their aspirations a key part of the Trust's mission.

The Trust has made the commitment to foster relations with whanau, hapu, iwi and other

Māori organisations to ensure equity and access to programmes and policies. Three strategic goals have been set:

- To support Māori community led development
- To foster Māori leadership and innovation
- To invest in our own organisation's capacity to make sure we have the resources to deliver on those goals.

Trust CEO Jennifer Gill says the Māori strategy will "provide direction and guidance on how the Trust can engage and work with Māori in our rohe (region). Our Māori Action Plan will now be revised to reflect how the Trust can deliver on the strategy."

The plan will give staff and trustees clear actions and targets, which

**"The Māori strategy will provide direction and guidance on how the Trust can engage and work with Māori in our rohe (region)."**

*Jennifer Gill  
Trust CEO*

will be included in the annual operating plan to ensure enough resources are allocated.

"The Māori strategy and the action plan are part of an overall review of the way the Trust does business," Jennifer says. "The review process has already resulted in clearer guidelines for how and what we fund throughout the sectors. Now we will be guided in our work for the Māori community as well."



“We want to support organisations that protect and enhance the environment and we look for organisations that are operating at a community level to raise awareness of issues affecting native species, flora and fauna, waterways and marine environments.”

Trust grants include help for restoration projects



## Grants support environmental work

Recent grants in the environment sector have included funding to help key groups with restoration and pest control work.

Motuihe Trust was granted funds for its work to restore Motuihe Island, in the Hauraki Gulf. Most of the grant was for general operating support, but it also helped fund a walking track network for environmental education and improvements to the accommodation unit for volunteers, who have established a nursery on the island and planted about 240,000 trees.

“The activities of the Motuihe Trust strongly align with ASB Community Trust’s strategic objectives for the environment sector,” says Environment Grants Advisor Kim Collins. “We want to support organisations that protect and enhance the environment and we look for organisations that are operating at a community level to raise awareness of issues affecting native species, flora and fauna, waterways and marine environments.”

Puketi Forest Trust received a grant for pest control in 15,000 hectares of Northland kauri forest, where an estimated 100,000 visitors a year enjoy

the experience of walking through an ancient, sub-tropical kauri forest.

“Puketi Forest not only has high conservation values, and the restoration trust uses an evidence-based best-practice approach to guide its work,” says Kim. “It has a high level of community support and it is a strong fit with ASB Community Trust’s strategy for the environment sector.”

Meanwhile, ASBCT’s pilot cultivation fund, which helps umbrella organisations as they in turn support local volunteer organisations, granted funds to The Hauraki Gulf Conservation Trust.

The grant will allow volunteer work to continue on a number of environmental projects on Waiheke Island, including the replanting of native trees on the McKenzie Reserve, restoration of a wetland at Waiheke School and restoration of the Te Toki Reserve on Waiheke’s Ostend causeway.

Further out in the Gulf, Windy Hill and Rosalie Bay Catchment Trust gained funding support for its forest restoration work on Great Barrier Island, while in the Far North, the Guardians of the Bay of Islands gained a grant for the Project Island Song restoration project.

Other environment grants include:

- \$12,350 for Friends of Te Atawhai Whenua Trust for its work protecting the Waiheke Island reserve;
- \$50,000 to help with Shakespeare Open Sanctuary’s pest-proof fence project in Whangaparaoa;
- \$50,180 for the Mountains to Sea Conservation Trust’s education programmes;
- \$32,400 to help Weedfree Waitakere with its restoration and weed eradication work in West Auckland;
- \$27,695 for Pointways Pony Club’s fencing of native trees and wetland at its Manurewa base;
- \$30,000 to the Guardians of the Bay of Islands for the Project Island Song restoration project;
- \$10,000 for Hua Rakau Trust ki Omamari’s work protecting land and marine habitats at, near Dargaville;
- \$30,000 for Friends of Rangikapiti Reserve Society for weed control in the Far North, Mangonui, Rangikapiti Reserve;
- \$11,710 for Whangarei Quarry Gardens Trust’s native forest restoration at Whangarei Quarry Garden;
- \$28,700 for the Waste Resource Trust’s sustainability work on Waiheke Island;
- \$20,000 for Worldwide Fund for Nature’s work to protect the Maui’s Dolphin population.





## Recreation & Sport grants explained

Grants for recreation and sport groups is the latest topic discussed on Triangle Television's Trust Us show.

Running at 8.25pm on Saturday nights, the short show looks at what areas of the recreation and sport sectors the Trust's grants can help with.

Recreation & Sport Grants Advisor Cyril Howard talks about how funding now falls into three broad areas: encouraging participation; regional support and infrastructure and collaboration.

"As a grants advisor my job is to work with community

organisations, to help them understand funding priorities and to explain what the Trust will and will not fund," says Cyril.

The show, which will be repeated at the same time for the next month, is part of a series of informational programmes produced and hosted by Triangle Television in recognition of the Trust's support.

Other shows this year have included funding for environmental and heritage groups, while the next Trust Us show will look at grants in the learning sector.

Once the shows have finished their run on Triangle Television they are put on the Trust's website, in the relevant funding sector, as an information resource for fund-seekers.

[tritiv.co.nz](http://tritiv.co.nz)



Encouraging participation is a key part of the Trust's funding programme. Photo: Neville Bailey



## Squash celebrates strong growth

Auckland region's 28 squash clubs are turning around a decade of decline in player numbers by focusing on the needs of grass-roots players, says Squash Auckland.

The regional body has in the past two years rolled out an array of programmes that meet the needs of young players and women, as well as targeting ethnic groups who are new to the sport.

**"Encouragingly, most of the schools are offering squash for the first time."**

*Adrian Dale  
Squash Auckland GM*

Squash Auckland General Manager Adrian Dale says the Women in Squash promotion gave new players six weeks of

coaching for \$60. More than 400 women have taken part and those who went on to join a club were given a free racquet, drink bottle and a squash ball to kick-start their new sport.

"Fifty one women have joined a club as a full paying member after participating in the Women in Squash program," he says. "That represents 31% of the women participants who were not already members of a club."

The pay-offs continue, with women's team entries in inter-club competitions increasing by 17.5% last autumn.

At the school level, over 20 schools are participating in squash programmes already this year, with more than 1,000 students taking part.

"The schools programme has been an enormous success," says Adrian, "and encouragingly, most of the schools are offering squash for the first time."

The Discovery Squash Beginners programme has recently been rebranded Discovery Squash for

Men, Squash Fit opens clubrooms for early morning fitness programmes and the Jets junior inter-club competition has spread across the region. Meanwhile, in Papatoetoe, a Discovery Squash programmes this year targeted members of the South East Asian community, where squash has never been a traditional sport.

Player numbers across the age-groups are rising and masters level player numbers are the highest in 12 years.

"For the first time in 10 years Auckland has experienced positive growth in the number of senior inter-club entries," says Adrian. "This year entries rose by three teams—that might not look particularly significant, but given that this competition has experienced 10 consecutive years of decline, the increase is worth celebrating."

In March 2010 the Trust granted Squash Auckland \$24,800 toward its junior development initiatives and coaching education.

[squashauckland.org.nz](http://squashauckland.org.nz)



Karyn McLeod, Stuart Burns, Alison Taylor, Chloe Harwood and Robyn Scott



## 'Catalytic philanthropy' drives US

'Catalytic philanthropy' is driving grantmaking in America, say New Zealand philanthropy professionals who have recently returned from the US.

A group of five New Zealanders, representing five organisations involved in philanthropy, attended the GEO National Conference in Pittsburgh in April to learn more about philanthropy within this international context.



returned impressed by the scale of US giving, but confident that philanthropy in New Zealand still measures up well.

"The US is the heartland of evaluation and strategic grantmaking, so they do have a jump-start on us," commented Chloe, the Trust's Policy and Research Manager. "We got to hear from large funders and we could see that philanthropy there is an industry. They borrow extensively from the business model, focus on fewer projects and they are strategic about advocating for policy change in areas such as immigration and health."

Karyn McLeod, the Trust's Grants Manager, said the GEO (Grantmakers for Effective Organisations) conference drew 500 delegates from 350 member organisations—a small conference by US standards, where up to 3000 people can sometimes attend a philanthropy conference. However, major philanthropic organisations were represented, including the Bill

& Melinda Gates Foundation, The David and Lucile Packard Foundation, W. K. Kellogg Foundation, The Heinz Endowments, The Rockefeller and Ford foundations.

Much of the talk at the conference was about "catalytic philanthropy", said Chloe. "They are trying to bring groups together to bring about change. They work to understand the big issues and bring partners to the table through intentional giving."

The pair noted that the US focus is on workforce development and job creation, with businesses working closely with universities to ensure students graduate with the skills that businesses need. The philanthropic sector, too, has a strong focus on jobs and economic security, job training and job placement.

Read more at: [www.asbcommunitytrust.org.nz/news-publications/recent-feature-stories/catalytic-philanthropy](http://www.asbcommunitytrust.org.nz/news-publications/recent-feature-stories/catalytic-philanthropy)

"They are trying to bring groups together to bring about change. They work to understand the big issues and bring partners to the table through intentional giving."

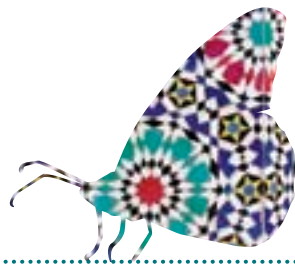
Chloe Harwood  
ASB Community Trust

ASB Community Trust staff Chloe Harwood and Karyn McLeod have

### New Trustees appointed

- Ann Hartley has been re-elected as Chair of ASB Community Trust.
- The community trust's board members vote annually for the roles of Chair and committee chairs, with board members electing Brian Lythe to continue in his role as Deputy Chair.
- Trustees also voted other board members into leadership roles, with Ken Whitney elected as Chair of the Finance and Investment Committee, Phil Greenbank as Deputy Chair of the Finance and Investment Committee and Paula Kearns as Chair of the Audit and Risk Committee.
- Brian Lythe and Lorraine Wilson were elected Co-Chairs of the Grants Panels, while Kristen Kohere-Soutar was elected Co-chair of the Māori and Pacific Committee.
- Meanwhile, five new Trustees have been appointed to the board. They are: Enosa Auva'a, Principal of Mount Albert Primary School; Mark Brickell, Managing Director of Vineyard College; Lyn Lim, founding partner in Auckland law firm Forest Hamilton; Pukekohe farmer Ian McDougall; and Moerewa health, education and social development consultant Moe Milne.





### Who can apply?

Incorporated societies and charitable trusts which have been operating for at least 12 months.

### How to apply

Download an application form and funding guideline from our website, [asbcommunitytrust.org.nz](http://asbcommunitytrust.org.nz) or phone 0800 272 878.



### Applying for a grant? Here's a list of what we fund

Our mission: to enhance the lives of everyone in our region by wisely allocating, equitably sharing and responsibly managing the resources that we hold in trust for present and future generations.



#### Arts & Culture

The Trust supports creative projects and organisations that aim to foster access, engagement and experience in the arts.



#### Community Building Projects

We aim to support capital building projects where there is strong community involvement, or where the project has regional significance.



#### Community Wellbeing

We support organisations that respond to the needs identified by our communities. Our focus is on innovative programmes that address the underlying causes of social problems.



#### Environment

We support projects and organisations that protect and enhance the environment in which we live.



#### Health

We support and strengthen community organisations that improve health outcomes for the people of our region, by focusing on health promotion and preventative projects.



#### Heritage

We support projects and organisations that preserve and promote the physical and cultural heritage of our region.



#### Learning

We support projects that improve educational outcomes for people in our region by adding value to the sector, with a focus on innovative projects and lifelong learning.



#### Marae

In recognition of the special role marae play in our community, the Trust will support marae development projects.



#### Recreation & Sport

We support organisations that focus on community participation and engagement in recreation. Targeted support will be provided for those organisations that aim to increase participation by younger and older people.



#### Rescue Services

We acknowledge the important and necessary role of rescue services in our region. We will provide strategic support at a regional level.

ASB Community Trust  
50 Ponsonby Road  
PO Box 68 048, Auckland

p 09 360 0291  
0800 272 878

e [info@ASBCommunityTrust.org.nz](mailto:info@ASBCommunityTrust.org.nz)  
w [ASBCommunityTrust.org.nz](http://ASBCommunityTrust.org.nz)

*ASB Community Trust was established in 1988 following the sale of its shares in ASB Bank Ltd. The Trust is grateful to ASB for its ongoing support.*

### Application closing dates

Sector	Round 1	Round 2
Arts & Culture	April 1	September 1
Community Building Projects	February 1	
Community Wellbeing	February 1	July 1
Environment	June 1	December 1
Heritage	April 1	September 1
Health	February 1	July 1
Learning	June 1	November 1
Marae	February 1	July 1
Recreation & Sport, Rescue Services	May 1	October 1

