



TRUSTLINE

A double celebration in Auckland

Trust joins museum to mark a turning point for both organisations.

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Annual meeting starts on a high note

Kaitaia turns on a warm Northland welcome for the Trust's annual public meeting.

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Starpath aims to end educational inequality

A bold five-year project aims to identify the stumbling blocks stopping our young people reaching their educational potential.

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This edition of TrustLine heralds a number of changes that we have been going through, says Trust CEO Jennifer Gill

We have merged the two trusts: the ASB Bank Community Trust and the ASB Charitable Trust into a single entity, the ASB Community Trust. This is essentially the result of a legislative change amending The Income Tax Act 1994, to confer income tax exempt status on community trusts established under the 1988 Trustee Banks Restructuring Act. The ASB Community Trust now enjoys income tax exempt status and there was no longer any need for the traditional “two trust” structure.

The amalgamation led to a decision to launch a new “brand” for the Trust, including a new logo and a revitalised web-site. Perhaps most importantly, though, we have adopted a new strategic direction for our grants programme and significantly increased the number of staff working with the community through the application process.

It is important to the Trustees that the Trust is accessible to the communities we serve and having staff who are visible in and accessible to the community is an important part of this.

Trustees are conscious that the wealth of the ASB Community Trust was built up by the public of Auckland and Northland through their loyalty to the Auckland Savings Bank, established by Sir John Logan Campbell in 1857.

The Trust was established in 1989 when shares in the ASB Bank were sold to the Commonwealth Bank of Australia. The remaining shares were sold in 2000, leaving the people of Auckland and Northland with a philanthropic asset valued at one billion dollars.

The Trust is supported by ASB, but is quite independent of the bank. We enjoy our shared history, but the bank’s sponsorship programme and the ASB Community Trust’s philanthropic grant making are quite separate from each other.

On page five of this newsletter we announce the introduction of a new single annual funding round for major capital projects. Groups who are planning major sport and recreation or arts and cultural facilities who plan to seek ASB Community Trust funding are encouraged to contact a member of the grants team early in their planning process.

Applications for grants of \$1 million and over will only be considered once a year. Applications will close on 15 October each



/ ASB Community Trust CEO Jennifer Gill

“Groups planning major sport and recreation, or arts and cultural, facilities are encouraged to contact a member of the grants team early in their planning process.”

/ ASB Community Trust CEO Jennifer Gill

year and will be considered over a two-stage process, with the final announcement of successful projects being at the end of March the following year. Applications that make it through to the second stage of assessment will be required to provide detailed business plans and feasibility studies, which may be subject to an independent external review, ensuring that the Trust’s funds are spent in the fairest and wisest manner possible.

Although this edition of TrustLine has focused on major projects, in fact the majority of the Trust’s grants have traditionally been for amounts less than \$50,000 and this is still the case.

These grants may be as small as \$2,500, but they are important as they assist groups across our region to keep functioning on a daily basis, delivering services and programmes in health, social services, education, the environment and heritage, to their own communities in the ways that they know best.

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A double celebration at the Auckland War Memorial Museum recently marked two major milestones

For the Trust, the gala event was an opportunity to launch its new name, new logo and a new era for what has become the biggest philanthropic organisation in Australasia.

For the museum it was a celebration because the latest grant from the Trust completed an eight year fundraising campaign for its redevelopment.

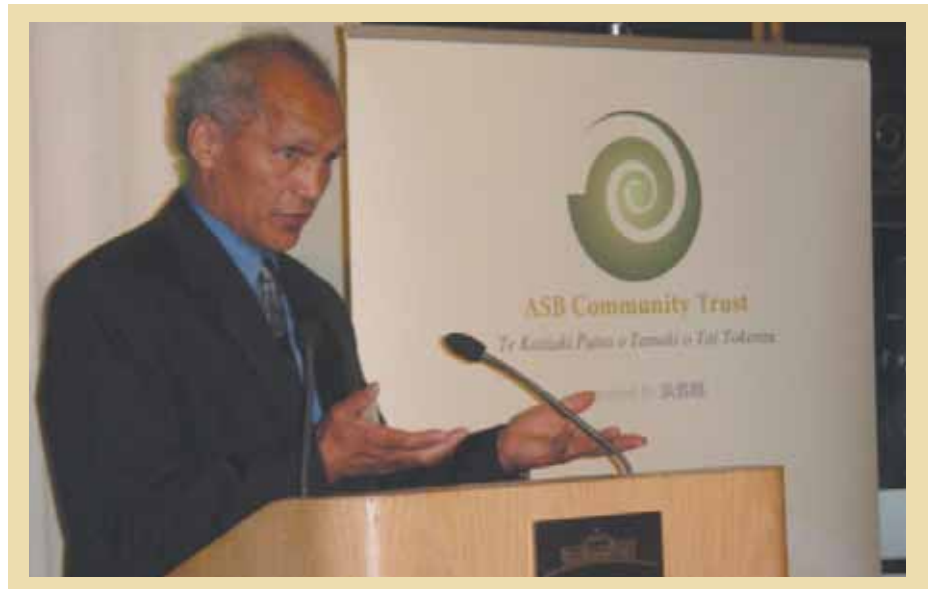
Prime Minister Helen Clark formally announced the Trust's new name and logo, while Trust Chairman Kevin Prime was able to explain the significance of the koru as our new emblem.

"The koru reaches towards the light, striving for perfection, encouraging new, positive beginnings.

"These are also key values for the ASB Community Trust as it encourages our community to grow and develop," he said.

"The koru represents the unfolding of new life, that everything is reborn and continues. In our logo, it represents the Trust's renewal and its hope for the future."

In the past year a lot has changed for the Trust. The new name and logo are outward signs



/ Trust chairman Kevin Prime explains the significance of the koru as our new logo.

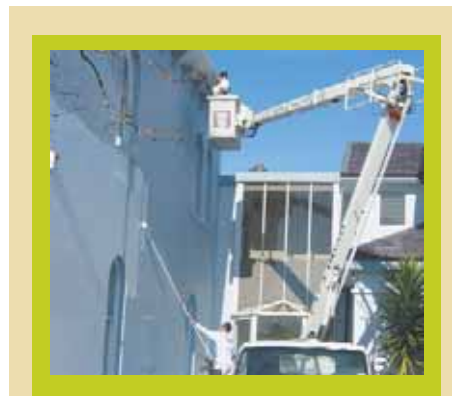
of major changes within the organisation – including a new mission, a new vision and the development of clear strategic goals.

However, the Trust's core objective remains the same – finding great projects and funding

them. Our staff and trustees know it's vital to build strong relationships and our new website will be an important way to maintain communications.

www.ASBCommunityTrust.org.nz

Back to the future for historic Allendale



Allendale – the Trust's Auckland home at 50 Ponsonby Road – has undergone a facelift that's taking it back to the future.

The historic building would probably have been painted white when it was first built in 1892, so it's off with the grey look and on with a bright white finish that should last for the next 10 years.

Trust supported in its drive to improve the lives of people and communities

ASB, the bank, is continuing to support the Trust in its drive to improve the lives of people and communities in Auckland and Northland.

The bank has played an important role in the Trust's heritage and a renewed support agreement means ASB will continue to be involved in the Trust's future.

"Although the Trust and its decisions are entirely independent of the bank, ASB's significant investment in our future demonstrates their commitment to the community," says ASB Community Trust CEO Jennifer Gill.

ASB Chairman Gary Judd says the Trust "is an essential organisation helping to stitch together much of the fabric that makes up the Auckland and Northland regions. Few people know it granted millions of dollars to crucial services such as St Joseph's Mercy Hospice, or that it gave significant assistance to the Waitangi National Trust."

The Trust has evolved from a tradition of philanthropy, started by one of ASB's founders, Sir John Logan Campbell, in the 1800s.

"From its earliest days the bank made grants

to projects which became icons, such as the Auckland Museum and the recently renamed ASB Showgrounds," says Mr Judd. "We're delighted to continue to be a part of the ASB Community Trust's day-to-day operations. It's

"Although the Trust and its decisions are entirely independent of the bank, ASB's significant investment in our future demonstrates their commitment to the community."

/ ASB Community Trust CEO Jennifer Gill

new focus will provide much-needed support in Auckland and Northland regions."

The investments of ASB Community Trust have continued to grow from the original sale of its shares in ASB in 1989.

The Trust's investments are now worth over \$1 billion and since 1989 more than \$500 million worth of profits from these investments have been granted to not-for-profit organisations in the region. Grants now average approximately \$55 million a year.

New trustees – welcome on board

Waitai Petera

The Maori Development Officer for the country's largest intellectual disability service provider for Maori, Te Roopu Taurima o Manukau, Waitai Petera holds a



Master of Management from Auckland University. With tribal affiliations to Northland's Te Aupouri and Ngati Kuri, he is the former chief executive of the Te Aupouri Maori Trust Board, of which he is still a member.

He is an iwi representative on the Maritime and Seafood Educators Association of Aotearoa and a Te Aupouri Iwi negotiator for land and fisheries settlement claims.

Waitai also represents Te Ohu Kaimoana, the statutory organisation dedicated to future advancement of Maori interests in the marine environment, on the Maori Caucus Seafood Advisory Committee and the Aquaculture and Seafood Advisory Group.

Soana Pamaka

Appointed Principal of Tamaki College in March 2006, Soana Pamaka has taught at the East Auckland school for 15 years.



With a BA in Education from Auckland University and a Diploma of Teaching from Auckland College of Education, she began as an assistant English teacher in 1990. By 1998 she was Deputy Principal of the 650-pupil, multicultural school.

She has worked with community police to resolve youth issues in the Glen Innes community, which led to formation of the Tongan Tamaki Youth Group, and has been a tutor for a scheme teaching driving licence requirements in the Tongan language.

Married with four children, Soana has also been a Sunday school teacher since 1990 at St Mary's Cooperating Parish, in Glen Innes, where she is a parish council member.

Soana and Waitai replace Trustees Lisa Howard-Smith and Melino Maka, who have retired.

Grants team grows as three join staff

Three new Grants Advisors have recently joined the Trust.

Catherine George

Catherine has experience as an advisor for the New Zealand Lottery Grant Board and has worked with environment and heritage groups in Auckland and Northland. A trained journalist, she has also worked in radio and print.

A North Shore resident, Catherine has a wide range of community interests, including children's theatre, music, education and heritage.

Moi Becroft

Before joining the Trust Moi worked for the Department of Internal Affairs for 11 years, doing community development work and coordinating Auckland COGS committees during that time.

With Nga Puhi connections through her mother (a Beazley), she grew up in Kaipara's Port Albert as a fifth generation Albertland settler on her father's side.

Well networked and known within Auckland's social service sector, Moi has a profoundly deaf daughter, which also connects her to the deaf community.

Moi's passion for music means she's excited by what's happening in the New Zealand music scene these days and living at Piha, on Auckland's west coast, allows her to enjoy her other interests – the sea and the bush.

Shalini Pillai

Shalini joined the Trust after working as an administrative officer and exchange coordinator at Auckland University. She is completing her MA in Development Studies, with a focus



Clockwise from top:

Catherine George,

Moi Becroft

and Shalini Pillai

"Adding new staff to our Grants Advisor team will strengthen our ability to serve the not-for-profit sector"

/ ASB Community Trust CEO Jennifer Gill

on renewable energy, and was drawn to grass roots community support work by an interest in energy and rural health, in particular their effects on poverty and development.

Born in Malaysia, she has lived in New Zealand since 1989, but has also been a development worker for the Street Children's Program in Vietnam, a development instructor in India and underwent development work training at the Institute for International Cooperation and Development, in Michigan, USA.

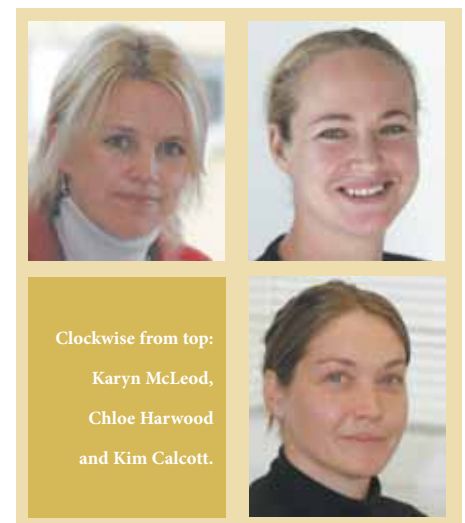
Responsibilities change as numbers increase

With the Grants Advisor team growing to six, Karyn McLeod has taken on the new position of Grants Team Leader and will also be responsible for the central Auckland area.

Kim Calcott is now Grants Advisor for Counties Manukau and the Gulf islands. She is also responsible for the social service and volunteer sector developments. Chloe Harwood is responsible for arts and culture, as well as leading policy and evaluation developments.

Catherine George works in Kaipara, Rodney, North Shore and is responsible for the education, environment and heritage sectors. Moi Becroft covers sport, recreation, marae and community economic development, as well as advising Far North and Whangarei applicants.

Shalini Pillai covers health, community economic development, refugee and migrant services and is Grants Advisor for West Auckland.



Clockwise from top:

Karyn McLeod,

Chloe Harwood

and Kim Calcott.

After five years as a Grants Advisor with the Trust, Katrina Dansted has left to care for her new baby, Tomas. We wish her all the best in her new role.

Trust's annual public meeting kicks off on a high note in Kaitaia



/ Circus Kumarani performers entertain the crowd in Kaitaia.

Colourful circus stilt walkers ensured the Trust's annual public meeting kicked off on a high note in Northland this year, while our Auckland public meeting included a funding fair and fundraising workshop.

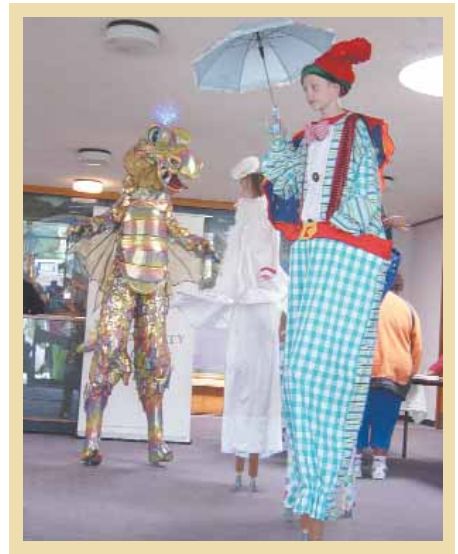
In what was a celebration of community success, Trustees gave their annual reports in Kaitaia during an afternoon of performance by clowns and jugglers from Dargaville's Circus Kumarani, a presentation by Moerewa's He Iwi Kotahi Tatou Trust, Kaitaia's He Korowai Trust

and a health-focused skit from Oruaiti School's Problem Solvers team.

The Trust's annual Auckland public meeting drew a crowd of about 400 to Manukau's TelstraClear Events Centre. The event included a fundraising workshop by Waitakere City Council Community Assistance Facilitator Jan Brown and a public funding fair where the Trust was joined by 17 other not-for-profit funding and support groups.

Both events were part of our commitment

In what was a celebration of community success, Trustees gave their annual reports in Kaitaia during an afternoon of performance by clowns and jugglers.



to building capacity within the not-for-profit sector – something you'll be hearing a lot more about in the future.

Planning is already underway for next year's public meetings. Auckland War Memorial Museum's new atrium has already been booked for the August 27 meeting and a decision will be made soon on the venue for our Northland meeting on September 23, 2007.

Single annual funding round announced for major capital projects

The Trust is introducing a single annual funding round for big regional projects – facilities in the sport, recreation, arts and culture sectors where applicants are requesting \$1 million or more.

These will usually be projects that have already received significant financial support from other funding sources, with at least 65% of funds already secured. All projects should be community based initiatives that match the objectives of the Trust.

Applications must be received by October 15, with a final decision made at the end of the financial year in March, 2007. Applications for comparable sized grants in other sectors will be unaffected. Applications

in the fields of health, education, social services, environment and heritage will be processed as usual.

Process

Applications must be received by 15 October each year. There will be a two-stage process.

Stage one

At the November Board meeting Trustees will prioritise applications. Those applying must be able to show the project:

- is value for money
- has community support
- will have a significant impact and positive outcomes

- has long term sustainability
- can access funds from other sources.

The Board will decide which projects go on to stage two, with unsuccessful groups advised before the end of December.

Stage two

Applicants will be asked for more information on the project's feasibility and sustainability and this will be reviewed by professional external assessors who will report to the Trustees in late February.

Successful applicants will be advised of the outcome of the Board's decisions by the end of March each year.

Visit www.ASBCommunityTrust.org.nz for more details.

Strong results boost 2005-06 grants budget

Strong investment returns allowed the Trust to make some major grants at the end of the financial year.

This included adding \$5 million to the \$2 million already granted to Waitangi National Trust for the new visitor centre and theatre to be built at Waitangi, in the Bay of Islands.

Another \$2.5 million was granted to the Auckland War Memorial Museum, allowing it to complete fundraising for its \$108 million redevelopment. This brings the Trust's total grants to the museum to \$18 million since 1990 – the Trust's largest-ever grants project.

In announcing the grant, museum Director Dr Rodney Wilson invited Aucklanders "to think what our city would be like if there had been no ASB Community Trust".

"Through prudent investment and management the Trust has increased its capital by a third while, at the same time, distributing more than half a billion dollars to the Auckland Northland Region. This money has gone into cultural, educational, sporting, health and welfare projects – large and small – to the immense benefit of the region. Who would have provided that money, had there been no ASB Community Trust?"

Another Auckland icon to receive extra funding is the Auckland Art Gallery, which was this year given another \$4 million towards its development project – bringing total Trust grants towards the upgrade to \$6.5 million.

Auckland Art Gallery Foundation chairman John Judge is "thrilled and encouraged" by the grant, which brings total donations to more than \$13 million.

"It is hoped a grant of this magnitude will not only demonstrate the Trust's belief and commitment to the project, but will encourage other potential funders."

Acknowledged as the leading national art gallery, with the most significant New Zealand collection in the country, backing from a key regional funder will be critical to its future fundraising efforts.

"We are sure that this extra injection of funds will make an immediate and significant difference to the success of the project," says Trust CEO Jennifer Gill.

Elsewhere in the region, \$1.7m was granted over three years to help the Te Araroa Trust create a walking trail the length of New Zealand. In the Hauraki Gulf, the Motu Kaikoura Trust was granted \$1 million for its work in managing the environmental restoration of Kaikoura Island.

Meanwhile, Northland's Waipoua Forest Trust, has been granted \$810,000 to help buy 60ha of land between Waipoua Forest and Maunganui Bluff.



/ Great Barrier is to get a new adventure centre.

Photo: Ben Allen

Outdoor Pursuits Centre is helping young Kiwis to develop their potential

The Sir Edmund Hillary Outdoor Pursuits Centre's new marine centre at Karaka Bay, Great Barrier Island, has secured funding to develop the new centre on Great Barrier Island.

"Grants from the ASB Community Trust, worth almost a million dollars, will allow the Sir Edmund Hillary Outdoor Pursuits Centre to help young New Zealanders to develop their potential and experience adventure in one of our most diverse marine environments," says OPC CEO Grant Davidson.

OPC's ambitions match the Trust's objectives on a number of levels, says Trust CEO Jennifer Gill.

"While OPC has developed and increased the range of programmes that it offers, founder Graeme Dingle's original vision and the philosophy behind the programmes has changed little – developing people's potential through challenging outdoor adventures, environmental awareness, fun and support.

"We are interested in funding projects or

"People taking up the challenge of adventure suddenly find the world is full of opportunities."

/ OPC CEO Grant Davidson

organisations that will help us achieve our mission – enhancing the lives of people in the communities of Auckland and Northland," she says. "The outdoor education centre on Great Barrier helps meet that objective."

The outdoor pursuits centre will allow up to 1500 young people a year to join courses where OPC instructors will guide them through kayaking, sailing, and coastal rock climbing adventures.

"People taking up the challenge of adventure suddenly find the world is full of opportunities", says Mr Davidson. "Previously perceived barriers are no longer an obstacle to participation and achievement. This sharing of fun and success is the OPC experience".

www.opc.org.nz

Landmark year for Titirangi's McCahon Trust as artist's home restored



/ Associate Professor Peter Simpson views the show with Prime Minister Helen Clark.

Photo: Chris Hoult

Under the watchful eye of heritage architect Graeme Burgess, the Titirangi cottage that was home to artist Colin McCahon has been brought back to its original state.

The restored house is open to the public from 10am-2pm on Wednesday, Saturday and Sunday. Special interest tours and education groups targeting secondary and tertiary students are run from Lopdell House Gallery at other times.

Next to the cottage, inserted into the forest canopy, is the accommodation and studio designed by Pete Bossley for arts residencies. Three residencies will run annually, each for three months.

To mark the completion of these projects the McCahon House Trust and Lopdell House Gallery, Waitakere City's Regional Art Gallery, have mounted a special

McCahon exhibition: *Colin McCahon – The Titirangi Years, 1953-1959*. It runs at Lopdell House until October 8.

The ASB Community Trust has put close to \$1 million into the restoration project, which is another good example of grant-makers working to support a great project. Waitakere City Council gifted the land and SKYCITY Auckland Community Trust made a \$264,790 grant. The Portage Licensing Trust has granted \$283,064.

Other funders include the Sir George Elliot Trust, Ministry of Tourism, Creative Communities Scheme, Burnett Charitable Trust, Lion Foundation, Century Foundation, Auckland Regional Services Trust, Chartwell Trust and the Tasman Trust.

www.lopdell.org.nz

Health benefits from Snug Homes project

Hundreds of low-income families are enjoying the health benefits and energy savings that come from insulating their homes thanks to a jointly-funded project in Auckland this year.

Funded by the Energy Efficiency Conservation Authority, ASB Community Trust, Mercury Energy, Starship Foundation, Auckland City Council, ProCare Network and the Auckland District Health Board, the insulation is free for qualifying families.

A total of 500 homes will be warmer as a result of the project this year and 300 homes have already been insulated.

The Trust is backing the project because of the serious health risks faced by people, particularly children, living in cold, damp homes – it's another way to make our communities better places for everyone to live.

Not only does the project create employment opportunities, but reduced power consumption is also good news for the environment.

EECA Chief Executive Heather Staley is impressed by the team-work shown by the funders. "This project is a great example of local business and community organisations working together with government to make a positive difference in people's lives."

www.snughomes.co.nz

"This is a great example of local business and community organisations working together with government to make a positive difference."

/ EECA chief Executive Heather Staley

ARTSPACE aims to inspire – and encourage risk-taking

Auckland's ARTSPACE aims to challenge, inspire and educate the makers and readers of contemporary culture by producing, exhibiting and communicating contemporary art in an environment that encourages risk-taking and fosters experimentation.

Its innovative, world-class exhibition programme, run from its building on Karangahape Road, puts it at the cutting edge of contemporary art, from where it intends to reach out to a wider audience, increase the participation and engage Aucklanders in the contemporary art scene.

Creative New Zealand provides ARTSPACE's core funding, but the Trust this year approved a \$50,000 operating costs grant that will allow Communications Manager Ida Moberg to build the organisation's public profile through publications, its website and media relations.

www.artspace.org.nz



/ Ida Moberg admires a sculpture by Wellington's Martin Basher.

Starpath aims to end educational inequality and transform results for under-achievers

A five-year project which aims to identify and transform the “chokepoints” denying many people a tertiary education has gained a \$1.5 million Trust grant.

Faced with figures showing NZ has one of the OECD’s highest educational inequality rates, the Starpath project aims to transform results for under-achievers.

The grant, paid over five years, will be matched by the Government’s Partnership For Excellence programme, which has identified Starpath as a key to building world-class tertiary education capability.

Prime Minister Helen Clark said Starpath won support because it “focused squarely on issues of access, participation and success. It is also concerned about building capability in the long-term”.

The ASB Community Trust is also committed to partnering innovative projects and hopes Starpath will help it achieve one of its core missions – reducing inequality.

Project Director and Auckland University Professor Helen Timperley says the aim is to change lives through education.

“In NZ, a relatively young population has the potential to give the nation a major competitive advantage – but only if New Zealanders from all backgrounds have the opportunity to realise their educational potential,” she says.

“NZ has the second highest rate of educational inequality in the OECD, with Maori, Pacific and students from low-income backgrounds showing high rates of educational underachievement.”

At the same time, population balances are shifting. The latest census says that by 2050



/ Our relatively young population could give the nation a major competitive advantage.

57% of children will identify as Maori or Pacifica and 68% will be non-European.

“Unless current patterns of educational under-achievement are transformed, our chances of developing a high-income, high-value knowledge economy are in danger,” Professor Timperley says.

Starpath, led by Auckland University Distinguished Professor Dame Anne Salmond, will work with schools in Auckland and Northland, examining students’ experiences to understand barriers that cause some to stumble.

It will analyse 20 years’ worth of educational data, including internal assessment material, NCEA results and data from Auckland-based tertiary institutions. The focus will be on changing results for students who are not realising their

potential. “At present, schools and tertiary institutions collect student information for educational purposes,” says Professor Timperley, “but they use it most frequently to report to the Ministry of Education and to justify the receipt of funding.

“The information is not routinely used to analyse and enhance patterns of educational achievement for students. However, without such analysis it is impossible to accurately identify the educational challenges actually experienced.”

“The Starpath project,” she says, “will enable a change to a system of evidence-based decision making that will increase the effectiveness of investments in education.

Applying for a grant? Here’s how

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.

Environment and Heritage

To increase the quality of life of current and future generations in this region, the Trust supports projects that preserve heritage and protect the environment.

Sport and Recreation

Projects that encourage participation in sport and recreation are our focus, particularly the participation of the young, the old and promotion of health and fitness.

Education

Our focus is on innovative projects and programmes that are generally not eligible for

government funding. We will, however, work in partnership on projects that meet our criteria.

Health and Social Service

We want to address social issues, improve equity and reduce poverty, making communities better places to live, particularly by supporting women and families, children and young people, older people and those who experience disability.

Arts and Culture

We support projects that aim to foster access, engagement and experience, together with cultural opportunities for all. We work in

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, www.ASBCommunityTrust.org.nz or phone 0800 272 878.

partnership to achieve the widest possible level of participation.

Economic Development

Working in partnership with local and central government, Maori and Iwi organisations, we want to identify projects which encourage social development and economic growth. As this is a new funding area for us, we are initially only supporting pilot projects in Northland.