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*ASB Community Trust receives strong support from ASB Bank Limited. ASB Bank continues to support its traditional Auckland and Northland local communities and has committed \$10 million over five years to assist the operations of its previous owner, the ASB Community Trust.*

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Ken Whitney  
Board Chair

*From the Board Chair*

The 2013 financial year was very much a game of two halves. In the first half, the value of the Trust’s assets declined, necessitating the implementation of a prioritisation framework for our grants. Fortunately, this situation reversed in the second half of the year as the value of the Trust’s investments recovered and we were able to maintain the grants programme, while also pre-funding and securing the 2014 grants budget.

In 2013 investment returns grew by 7.9% (net of fees), or \$81.2 million, compared with a negative 0.8% return (net of fees), or negative \$10 million, in 2012. By 31 March 2013, the Trust’s total assets were sitting at \$1.077 billion, well ahead of the \$1.022 billion total asset value in 2012.

The 2012/13 financial summary is included on page 44 to 49 and sets out the financial performance of ASB Community Trust Group and the parent Trust. At year end, the Group’s capital stood at \$893.3 million and the Group’s Trust Fund (comprising capital plus reserves) totalled \$1.077 billion.

In 2013 the Trust is celebrating its 25th anniversary. It is worth reflecting that during the past two and a half decades, grants worth over \$800 million have contributed to the infrastructure, growth and wellbeing of our communities. We are confident that we have a sound strategy in place to protect and enhance our assets over time, to ensure that ASB Community Trust grants will continue for generations to come.

**GRANTS**

Grants to community organisations totalled \$21.1 million, compared with \$36.6 million in 2012. This left the Group with total income of \$55.9 million for the year.

**As Trustees, we believe that our new strategic plan will enable us to pursue a more aspirational and imaginative approach to meeting some of the challenging issues in our communities while also improving our responsiveness to traditional needs.**

Our new Community Support Grant programme includes Quick Response Grants which, together with our forthcoming online application process, will allow us to meet the demand for faster application processing. In our Catalysts for Change and Key Community Partnership programmes we have adopted a high engagement model. This approach will focus on identifying new initiatives and supporting our granting programme by assisting with governance and capacity development among organisations with real potential for life-changing outcomes. Fostering collaboration among grantees and partnership with other funders are also important objectives. By working together we can lift our horizons and achieve more ambitious outcomes for the people of our region.



Chair’s review



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An increasingly important aspect of our work is to share the knowledge generated by our high-engagement funding and capacity-building support through credible and well researched evaluation reports which are freely available on our website. We hope that publishing the results of our experiences will provide a valuable resource for other funders and programme developers by highlighting our learnings on the key ingredients for successful and effective grants.

With encouraging results from our existing high engagement projects in the Māori and Pacific Education Initiative, Youth Health and Development Programme and the Community Housing sector we will continue to pioneer new initiatives that we can de-risk before the next level of funding is sought. We believe that we have an important role to play in taking a controlled risk in being an early funder of innovative projects which are community led and supported but which need to prove their success before they can be scaled up with more mainstream funding. In this way the Trust is able to play a unique and valuable role in the development of our communities and our country.

## INVESTMENT STRATEGY

The Trust's Investment Committee continuously reviews and adopts best practice in the oversight of the Trust's investment portfolio. Carefully constructed diversification across various asset classes helps protect the Trust as an in-perpetuity community asset.

Cambridge Associates, an international investment advisor to foundations and endowments, continues to help the Trust make sound investment decisions. Our investment strategies aim to maximise income, protect and future-proof assets, and ensure a reasonably stable level of spending.

The three objectives for the investment strategy are to:

- maintain the real value of capital of the Trust in perpetuity
- ensure a stable level of spending (operating and capital costs, and grants) over time
- maintain equity between present and future generations in perpetuity.

## ALLENDALE HOUSE

In April 2013 the Trust's Auckland home, Allendale House, was officially re-opened by Prime Minister the Rt Hon John Key after a two-year renovation project.

The refurbishment of Allendale has preserved and given new life to an iconic piece of Auckland's architectural and cultural heritage. The future-proofing work not only included earthquake-strengthening for the 120-year-old building, it also

included a purpose-built office complex that now sits alongside it. Our Trustees regard the refurbishing of Allendale House as a gift to future generations.

The Trust first moved into Allendale House nearly 25 years ago. As the largest non-government funder of heritage projects in Auckland and Northland, it was appropriate that we take responsibility for protecting a building that is such a significant part of the city's architectural history. With the Trust celebrating its 25th anniversary in 2013, the successful completion of the renovation project was a memorable way to mark this milestone.

The earthquake-strengthening work and sensitive restoration has won praise from the Historic Places Trust, while the buildings have been modernised with energy-efficient technology such as solar panels for water heating, sensor lighting and wool insulation. As part of our commitment to sustainability, the brief to the designers was to achieve a high green-star rating for all the work undertaken. This included everything from the selection of carpet and lighting, to the air conditioning system and paints used.

Allendale House is a terrific base from which we are proud to celebrate the past activities of the Trust and to launch a new chapter in our history. The old house represents tradition and stability, while the new annexe provides an efficient contemporary working environment for our trustees and staff to meet the challenges of philanthropy in the 21st century.



## Chair's review



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## PERSONNEL

During the past year we said farewell to four Trustees: Brian Lythe, Ann Hartley, Kristen Kohere-Soutar and Paula Kearns.

Brian was one of the Trust's longest-ever serving Trustees. Appointed in 2000, he served three terms on our Board and because of this he was able to bring a deep knowledge of the Trust's history and community impact to the Board table and to help guide new Board members as they began their work.

Ann was my predecessor as Chair of the Board and during her four years as a Trustee, she gave her time and passion unstintingly as a Board member. Due to Ann's many community connections and long experience, we benefited greatly from her insight and advice in our decision-making.

Kristen was another long-serving Board member. Joining the Trust in 2004, she served two four-year terms as a Trustee. Kristen was an unflagging champion of the Māori and Pacific Education Initiative and also ensured that our Māori strategy was firmly embedded before her term ended.

Paula joined the Trust in 2009 and left in April this year. Paula brought with her strong connections to the sporting community and sound financial common sense. Her presence will also be missed.

We have since welcomed five new Trustees: Murray Broadbelt, Precious

Clark, John Slater, Kim Wright and Vipin Garg. They all bring valuable new skills to our Board and we are already reaping the benefit of their knowledge and abilities. We look forward to working with them in the years ahead.

My report would not be complete without thanking my fellow Trustees for their passion, commitment and support this past year. All of the Trustees join me in thanking our CEO Jennifer Gill and her staff for their professionalism and leadership in implementing the Board's more strategic direction. We look forward to working with them as the Trust continues to build on its commitment to the communities of Auckland and Northland.

Finally, it has been a pleasure and an honour for me to serve as Chair during the past year. It is pleasing to see the Trust stepping up and becoming proactive in philanthropy, taking a lead in engaging with other funders and stakeholders, and forming partnerships both with other funders and with key grantees that will help maximise the impact of our grants programmes in the future.

*Ken Whitney, Board Chair*



## Chair's review



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Jennifer Gill  
CEO

*From the CEO*

**In May 2013 the Trust celebrated its silver anniversary, and the people of Auckland and Northland can celebrate the fact that during that time, nearly 16,228 grants have been invested in every community in our region.**

The Trust has supported and worked with community groups since 1988, funding large and small community organisations, projects and facilities from Port Waikato to Cape Reinga. Over the past 25 years our grants have ranged in size from a \$20 contribution to a North Shore primary school for a road safety kit to a grant of \$7 million towards the building of the Telstra Clear Events centre in Manukau.

We are looking forward to working with our community for a further 25 years.

The 2012 financial year was marked by the completion of the Trust's 2008-2012 Strategic Plan and the preparation of a new plan to guide our work through the next five years. The new plan includes a major revision to the Trust's funding programmes and funding categories and continues our work in high-engagement grant making and capacity development.

One of the highlights of the past five years' work has been the Trust's partnership with Energy Efficiency and Conservation Authority. Since 2008 the Trust has contributed \$5 million to the Healthy Homes Tai Tokerau Project. This project is a joint venture between two Northland community enterprises: the Community Business and Environment Centre (CBEC) in Kaitaia and He Iwi Kotahi Tatou Trust in Moerewa. The Trust's funding has been supplemented by other third party funders including Northland PHOs, Northland DHB, Top Energy and Northpower. This collective has in turn attracted additional funding from government. The aim of the project was to retrofit insulation into 5000 homes in Northland, occupied by families with high health needs, often young children.

Chris Farrelly Chief Executive of the Manaia Health PHO, said in a recent email to me: "This has changed lives, saved lives and enhanced lives on a significant scale and the lives are those of some of our most vulnerable. The ASB Community Trust has been such major supporter of this. Your trust, generosity and faithfulness, have made such a difference."



## CEO's review



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From an ASB Community Trust perspective this project has ticked many boxes: it is collaborative, involving multiple partners at central government, local government and community level. The project targets high-need communities, is evidence based and has clear measurable health outcomes. The project employs local people, many of whom are young and relatively unskilled and might otherwise be unemployed. There are clear environmental outcomes, through energy savings. The target of 5,000 homes in five years has been achieved, however, there are more to go and the Trust has committed further funds for this project.

Similarly the Trust is now seeing significant outcomes from our five-year investment in our Māori and Pacific Education Initiative. The Trust's external evaluators, Kinnect, reported recently to us that the majority of the projects that we have funded show better educational outcomes than previously achieved with Māori/Pacific children of equivalent year groups in the same community. For example C-Me Trades at School have

achieved a 100% success rate with their graduates moving out of the programme either into fulltime employment or further education. He Puna Marama, Manaiakalani, Māori into Tertiary Education (MITE) and Mutukaroa at Sylvia Park Primary School have all achieved outstanding, verifiable academic success with their students. The challenge for the Trust now is to work with these programmes on developing their plans for long term sustainability once our funding comes to an end and to work with others who may wish to replicate these exciting initiatives in other similar communities.

**An increasingly important aspect of the Trust's work is to share what we and our grantee partners learn. We do this through publications and newsletters and increasingly through our website, Facebook, Twitter, YouTube and other social media.**

The ASB Community Trust is an in-perpetuity trust and we will continue to support the people of Auckland and Northland long into the future. As a Trust we will continue to place importance on prudent investment strategies, on protecting the capital of the Trust, through monthly inflation adjustment, and on ensuring good governance and high quality administration practices.

I would like to thank my dedicated staff team, the Trustees and the community for all of the work that you do together to make Auckland and Northland a better place for us all to live in.

*Jennifer Gill CEO*

*Watch the Face TV interview with Jennifer Gill:*



## CEO's review



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One of the ASB Community Trust's financial goals is to maintain the real value of the Trust in perpetuity and, as such, it is a long-term investor. Trustees need to ensure that the Trust grows its capital base so that it can continue to support tomorrow's community organisations in a similar manner to those it has supported in the past.

The Trust's investment strategies are designed to ensure a stable level of spending over time to support its granting programme and administration costs. Cambridge Associates, the Trust's investment advisor, analyse potential investment returns under differing levels of growth and income assets over a 25 year period. From this modelling, Trustees set a spending rate at a level which not only meets the Trust's administration costs and granting programme, but also allows the Trust to build its capital base and reserves. These reserves protect the Trust's capital from inflation and support the granting programme in years of low investment returns.

The investment strategy has three long-term objectives. These are to:

- maintain the real value of capital of the Trust in perpetuity
- ensure a stable level of spending (operating and capital costs, and grants) over time
- maintain equity between present and future generations in perpetuity.

Over the long term the Trust seeks to achieve a return in excess of inflation (as measured by the Consumer Price Index) plus 5% over rolling five-year periods.

### PORTFOLIO MANAGEMENT

The Trust has a number of strategies designed to meet these objectives and to manage the inherent risks associated with investing.

At 31 March 2013 the Trust's investment portfolio totalled \$NZ1.1 billion. To provide diversification, the portfolio is spread between 24 fund managers across four broad asset groupings, or buckets. Each bucket (Growth, Diversified, Inflation Proofing and Deflation Proofing) is designed to play a specific role in the portfolio.

The Growth bucket includes fund managers investing in global equities, emerging market equities, private equity and venture capital. This bucket forms the engine room of the portfolio which, over time, will provide growth in the Trust's portfolio. At year end the Growth bucket was made up of 12 fund managers (two of the managers invest in funds managed by underlying fund managers) representing 44% of the portfolio value.

While the Diversified bucket also provides growth for the portfolio, it has the added benefit of reducing volatility. The managers invest in long/short hedge funds and absolute return funds and these strategies help to manage portfolio risk. At year end the Diversified bucket was made up of three fund managers (two managers invest in funds managed by underlying fund managers) representing 19% of the portfolio.

The Inflation Proofing bucket includes an element of growth whilst also providing protection in times of inflation through investments in commodities, property, natural resources, and inflation-linked bonds. At year end the Inflation Proofing bucket was made up of four fund managers, representing 10% of the portfolio.

The Deflation Proofing bucket provides for a reduction in volatility and protection against prolonged economic contraction through investments in bonds and cash. At year end the Deflation Proofing bucket was made up of four fund managers representing 27% of the portfolio.



## Investment strategy



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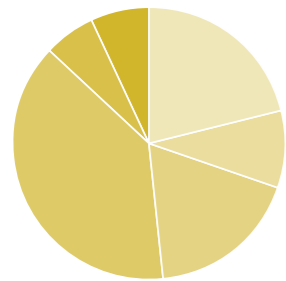
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In addition to diversification through exposure to a number of asset classes and fund managers, the Trust's portfolio is also diversified globally. The following table sets out the geographical spread of the portfolio:

*Geographical exposure as at 31 March 2013*



- New Zealand 21.2%
- Developed North America 38.8%
- Developed Asia-Pacific 9.2%
- Emerging Markets 6.1%
- Developed Europe 18.1%
- Commodities 6.7%

## INVESTMENT PERFORMANCE

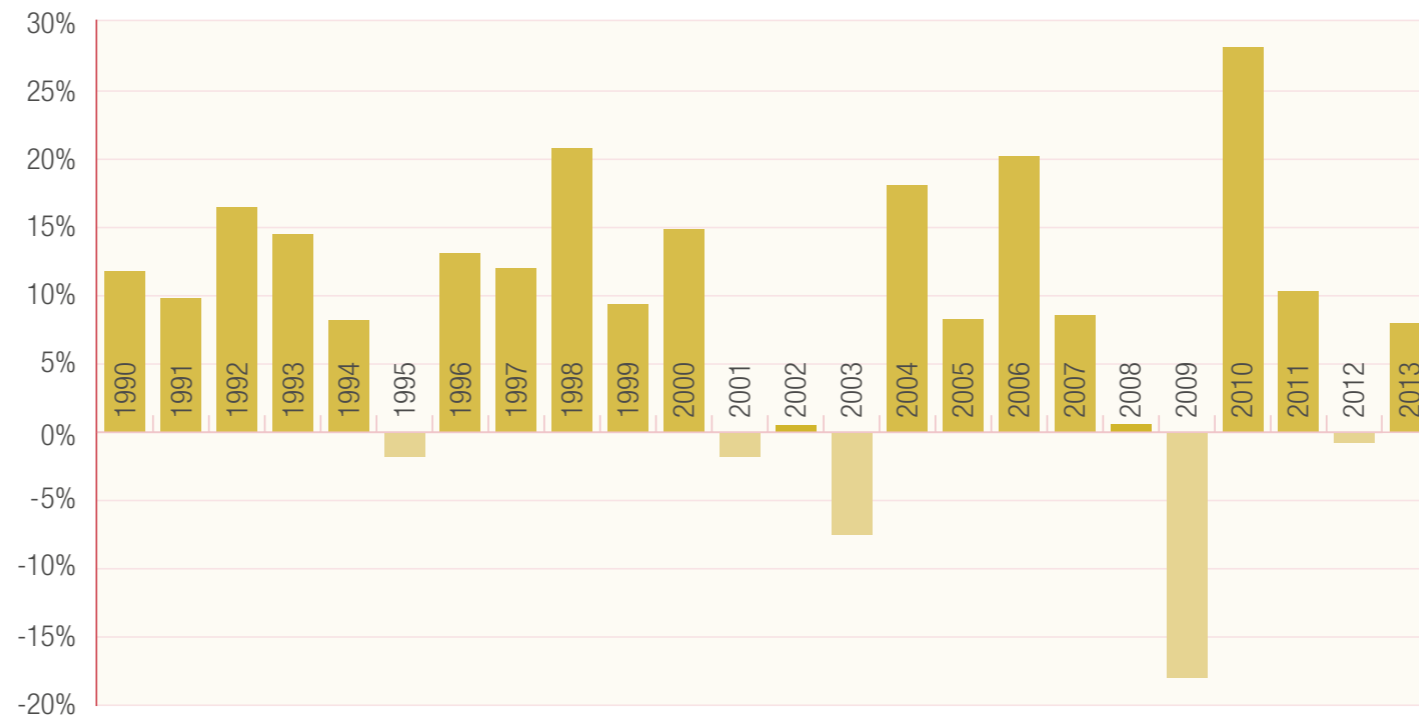
For the 2012/13 financial year the Trust's return from investments was \$81.2 million (7.9%, net of fees). This compares with a return of negative \$10 million (negative 0.8% net of fees) for the 2011/12 financial year.

The Trust's average annual compound return since inception, net of fund manager fees and expenses, has been 7.51% against the benchmark return of 5.81%. Over the past 25 years these returns have enabled the Trust to grant in excess of \$800 million to community organisations throughout Auckland and Northland.

Investment returns since the 1989/90 financial years are depicted in *Figure 1*:



*Figure 1: ASB COMMUNITY TRUST NET ANNUAL INVESTMENT RETURNS*



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The performance of the portfolio as a whole is also measured against an aggregated benchmark. The growth of \$100 is demonstrated by *Figure 2*. The growth from 1 March 1994 through 31 March 2013 of \$100 invested in the Trust's portfolio (blue line) compared with an investment in the Trust's aggregated benchmark (red line).

By 31 March 2013 the proxy portfolio of \$100 had grown to \$399.2, compared with the benchmark growth to \$295.1.

Each fund manager's performance is measured on a monthly basis against a benchmark appropriate for its investment strategy. Over a three to five year period fund managers are expected to provide positive returns in excess of their respective benchmarks.

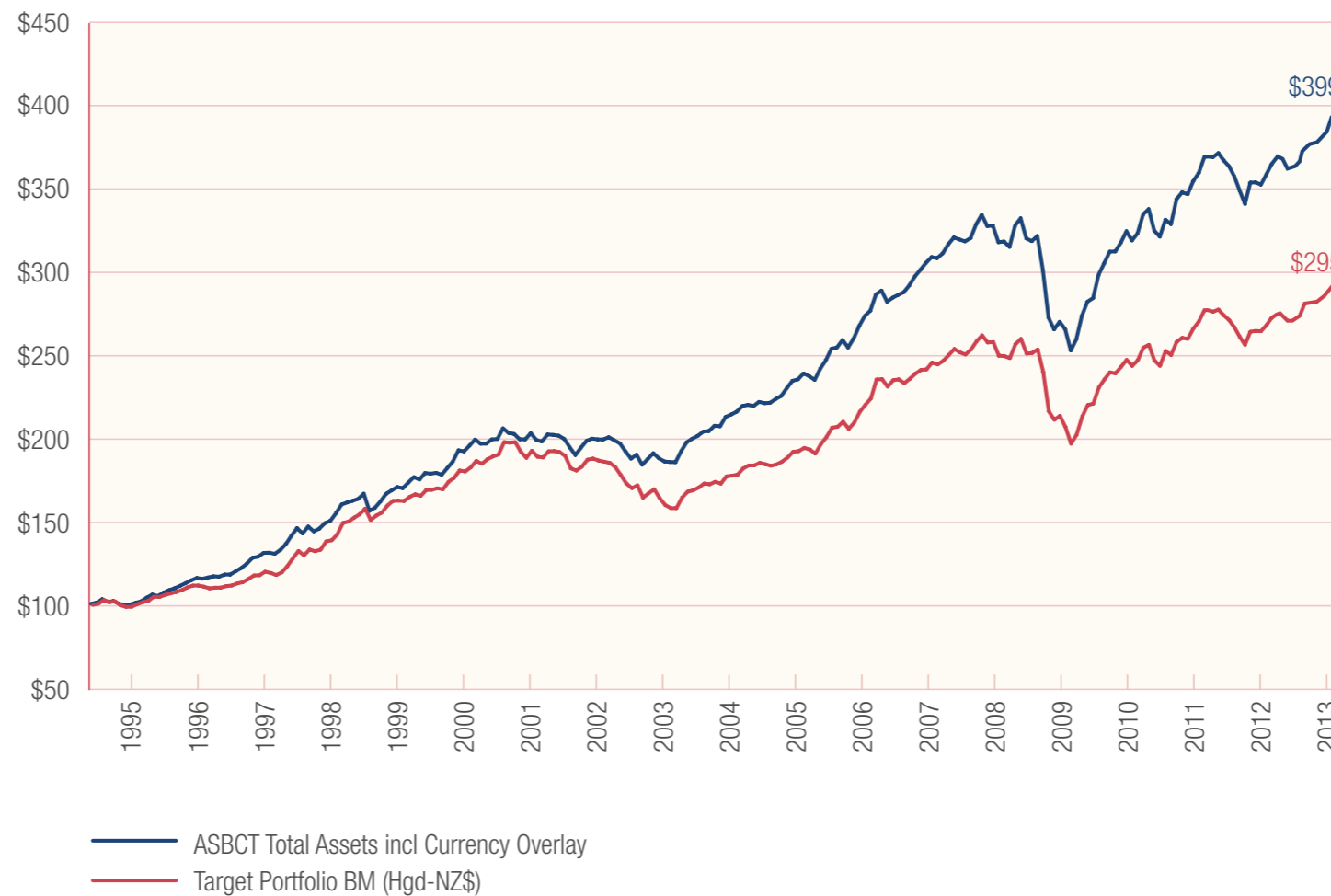
In the past year the Trust has enjoyed positive returns, thanks to a full weighting in growth assets and diversification through manager strategies and styles. However, growth has been slow and the market remains risky. Volatility in the financial markets is likely to continue for some time yet. With its conservative investment approach the Trust is well placed to manage the impact of market volatility and fund its granting programme, as well as to build its reserves and capital base over the long term.

## Investment strategy



**Figure 2: ASB COMMUNITY TRUST CUMULATIVE RETURNS**

*Inception through 31 March 2013*



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## ASB Community Trust continues to be a signatory to the United Nations Principles for Responsible Investment (UNPRI).

As a responsible member of the world community the Trust signed up to the UNPRI in 2008, adopting the principles as a way to demonstrate leadership by advancing universal principles and responsible corporate citizenship to make the global economy more sustainable and inclusive.

The Trust believes that environmental, social and corporate governance (ESG) issues can affect the performance of investment portfolios. The UNPRI provides a common framework to assist investors in considering and integrating ESG issues into their investment processes.

The ASB Community Trust has agreed that, over time, it will apply the following principles:

- Incorporate ESG issues into investment analysis and decision making processes
- Be active owners and incorporate ESG issues into its ownership policies and practices
- Seek appropriate disclosure on ESG issues by the entities in which it has invested
- Promote acceptance and implementation of the principles within the investment industry
- Work together with other signatories to enhance its effectiveness in implementing the principles
- Report on its activities and progress towards implementing the principles.

The Trust is also a signatory to the Carbon Disclosure Project and the Water Disclosure Project.

*More on UNPRI:*



*Carbon Disclosure Project:*



Signatory of:



## Aiming for sustainability



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## STRATEGIC PLAN ENSURES EFFECTIVE FUNDING

From 2013 the Trust is operating under a new five-year strategic plan, developed to help ensure that we are funding effectively for the benefit of the Auckland and Northland communities.

Applications for funding are now considered under three funding areas: People, Places and Participation, using a funding framework designed to maximise the delivery of our funding.

The People funding area supports community organisations working to facilitate improved outcomes for high need communities in our region, or to support strengths-based programmes that focus on positive outcomes for children, young people and their families.

Organisations that previously applied under the Trust's Health, Learning and Community Wellbeing sectors should check the People priorities listed on our website to see if their work is aligned with our new strategic objectives. Grants for early childhood education centres and schools are also considered under the People funding area, but have their own application forms.

The Places funding area supports projects that conserve the significant history of our region; projects and organisations that protect and enhance the environment; or marae development and building projects that develop community cohesion, enhance community participation, or are of regional significance.

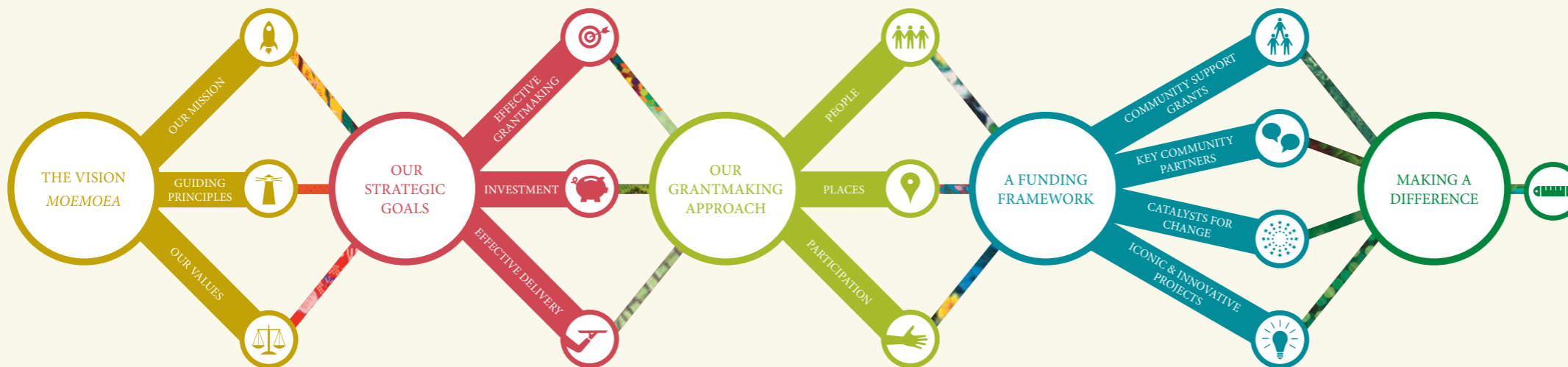
Organisations that previously applied under the Environment, Heritage, Community Building Projects or Marae sectors should check the Places priorities on our website to see if their work is aligned with our new strategic objectives.

Participation funding is for community organisations working to support the growth and development of recreation and sport by increasing participation and engagement at a community, regional and club level. It also supports creative projects and organisations that aim to foster access to, engagement with and experience in the arts.

Organisations that previously applied under the Recreation & Sport, or Arts & Culture sectors should check the Participation priorities on our website to see if their work is aligned with our new strategic objectives.



# Strategic Plan 2013-18



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## THE FUNDING FRAMEWORK

Our new approach to grant making builds on our past successes while incorporating best practice from within New Zealand and around the world.

These successful characteristics include working in partnership with key organisations, the creation of quick response grants and the development of targeted funds. We have taken these successful elements and created a range of programmes designed to maximise the delivery of our funding. These programmes will be rolled out over the next five years as they are fully researched and developed.

The Funding Framework includes the following four programmes:



### *Community Support Grants:*

We will provide general grants to community organisations, prioritised for organisations which are working in areas that align with our strategic goals and objectives.



### *Key Community Partners:*

We will work in partnership with organisations where there is a shared vision of positive outcomes for our communities. In these challenging financial times we anticipate that these partnerships will help our funding go further.



### *Catalysts for Change:*

We will identify issues facing our region and then fund organisations in a sustained way over a number of years to try and address these issues. This targeted approach will include additional support for increasing organisations' capacity to deliver. The intention is to create significant positive change through supporting innovative projects and practices.



### *Iconic & Innovative Projects:*

We want to be a proactive collaborator in funding iconic projects which will create a significant positive impact for the communities of Auckland and Northland. These iconic and innovative grants will only happen from time to time and are likely to be significant regional projects that will have intergenerational benefit and wide impact.

*More on funding:*



*Read the 2013-18 strategic plan:*



# Strategic Plan 2013-18



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## CELEBRATING 25 YEARS OF GRANT MAKING

Since its establishment in 1988, the ASB Community Trust (the Trust) has funded community groups and organisations, large and small, throughout every corner of Auckland and Northland.

However the Trust today is built on even older philanthropic and benevolent activities that grew from early European settlers in New Zealand, including John Logan Campbell, James Dilworth and Alexander Dingwall. They brought with them from the ‘old country’ grand ideas of creating personal wealth, as well as religious ideals and values of practical benevolence towards others.

In 1846, twelve of the city’s leading land-owners and merchants met at the legal firm of Brown, Campbell & Co to establish the Auckland Savings Bank. The story of ASB Community Trust can be traced back to 5 June 1847 when, spearheaded by Campbell and Dilworth, the Auckland Savings Bank opened its doors to give ordinary working people the advantages and privileges of a savings bank.

It accepted its first deposit of £10 on June 19 that year and by the early 1860s had 900 customers. At the turn of the century, transactions were worth more than £1 million a year and, in line with the principles of savings banks worldwide, some of the surplus went back to the community.

In 1906, an amendment to the Savings Bank Profit Act allowed the bank to give £10,000 to help build Seddon Memorial Technical College (now known as AUT University) on Wellesley Street. By the 1920s the Auckland Savings Bank was making substantial contributions to many organisations still in existence today.

## FROM BANK TO COMMUNITY TRUST

In May 1988 the ASB Bank Community Trust began life as a separate entity from the commercial ASB Bank. It was initially settled with 60 million \$1 ordinary shares in ASB Bank Ltd which represented 100% of the capital issued. This meant the Trust, on behalf of the communities of Auckland and Northland, owned the bank outright.

The newly appointed Trustees found that their first major decision was whether or not to sell part of the bank to the Commonwealth Bank of Australia (CBA). They commissioned an independent report by Ernst & Whinney that provided a seal of confidence on the decision to sell. At the time, Board Chair Judith Bassett wrote to the Minister of Finance David Caygill:

“We are firmly of the opinion that the bank will be able to strengthen and extend its present service through the alliance with CBA, and that the wider community beyond those using the bank services of ASB will benefit through a strengthening of the Trust in the following respects: diversifying its investment portfolio; increasing the income available for distribution in its region; and therefore more effectively fulfilling its objectives under clause 4(a) of the Trust Deed than it would be able to do should it remain the sole owner of a single (albeit a valuable) asset.”

The Minister gave his consent and 45 million shares were sold to CBA at \$5.60



## 25th Anniversary



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a share. The resulting \$252 million was donated to establish the ASB Charitable Trust, formed because income tax would be payable on the ASB Bank Community Trust's income if it continued to fund activities other than those of registered charities.

On 3 October 2000, the remaining 25% shareholding in the bank was sold to CBA for \$560 million and the value of the two trusts eventually rose to \$1 billion. Following changes in 2005 to the income tax laws to give community trusts tax-exempt status, the two trusts were amalgamated and renamed ASB Community Trust, and by 2007 the grants programme had increased to \$67 million.

#### GRANTS POLICY: THEN AND TODAY

Over its 140-year history, the Auckland Savings Bank used its funds for the betterment of the local community. Underpinning its policies was the practice of awarding grants to organisations providing services to people whose quality of life was less than that enjoyed by most others, and to organisations attempting to address specific social problems, such as drug abuse and youth development.

The new ASB Community Trust initially based its funding on the bank's historical policies. Over time, ever-improving grants guidelines pushed community groups to address issues such as clarifying legal status, applying for charitable status and improving overall business practices, including financial management. The

benefits of encouraging such levels of organisational development and capacity building extended far beyond the Trust's grants programme for the recipients.

**But the shift in focus from 'giving to charities' to being 'an investor in social change' would take more than two decades. Late in 2012, the Trust announced its new five-year strategic plan citing the principles that now underpin its future work and new grants policies over the next five years.**

The Strategic Plan for 2013-2018 is a clear road map enabling and directing the Trustees and staff who are responsible for driving it towards more strategic grant making.

While remaining committed to ensuring traditional community support funding, the Trust's focus is increasingly on working in partnership with grantees and other funders to achieve projects of greater scale and impact for the communities of Auckland and Northland.



#### FOUNDING TRUSTEES 1988:

From left: *Doug Graham, Elaine Gregory, Ross Robertson, James Neale, Judith Bassett (Chair), Waari Ward-Holmes, George Hawkins, Frank Knipe, Lee Goffin, Gary Judd.*

Absent: *Catherine Tizard, Agnes Tuisamoa.*

## 25th Anniversary



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*Allendale House was reopened in April 2013.*



**ALLENDALE HOUSE: HOME OF THE TRUST**

The Trust’s Auckland office, at Allendale House, sits on the first block of land acquired in the new settlement of Auckland by Governor Hobson in October 1840. It was built by George Allen in 1890 and is now the headquarters for ASB Community Trust.

At the celebration of its re-opening on 5 April 2013, after two years of reconstruction work, Trust CEO Jennifer Gill remarked that:

“With the refurbishment of Allendale House we have future-proofed an iconic piece of Auckland’s architectural and cultural heritage for future generations. It has all the features of a Victorian gentleman’s residence, sitting alongside a modern building designed to accommodate a dynamic, professional team. The new annex represents the cutting-edge of technologies and aesthetics for sustainable buildings in the 21st century.”

Renowned heritage architecture specialists Salmon Reed Architects led the project and, as the largest non-government funder of heritage projects in Auckland and Northland, it was appropriate that the Trust take responsibility for protecting a building that is such a significant part of the city’s architectural history.



25th Anniversary



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## THE NEXT 25 YEARS

ASB Community Trust is now one of the largest philanthropic organisations in Australasia. Its multi-million dollar community grants programme is funded from investments worth more than \$1 billion and the Trust is recognised internationally for its cutting-edge, managed-risk, and high-engagement approach to programme development and grantmaking.

“The Trust is just as much a part of the region’s heritage as Allendale House and the long-term vision of an in-perpetuity trust drives everything we do,” says Trust Chair Ken Whitney. “But we are not just restoring buildings, upgrading facilities and providing equipment. Rather, the Trust is taking the lead and actively engaging in community transformation and development through philanthropy and social enterprise — by focusing on programmes that break the cycles of under-achievement and isolation that can so debilitate modern societies.”

Our approach to the future is to collaborate and partner with governments — both local and central — family foundations, corporate social responsibility programmes, civic organisations, even individuals with big ideas, to ensure that the various communities in Auckland and Northland are benefiting from philanthropy-led solutions today, tomorrow and in perpetuity.

“However we might have felt about selling the bank, we had obligations to consider that went further than history and sentiment. As directors, we had a legal duty to consider whether this move was of advantage to the Trust and its objectives. After taking the independent advice proposed, we had to conclude that the move would be in the interests of the Trust and the people of Auckland and Northland.”

*Dame Catherine Tizard  
from Te Kaitiaki o te Putea: A Brief  
History of the ASB Community Trust.*



## 25th Anniversary



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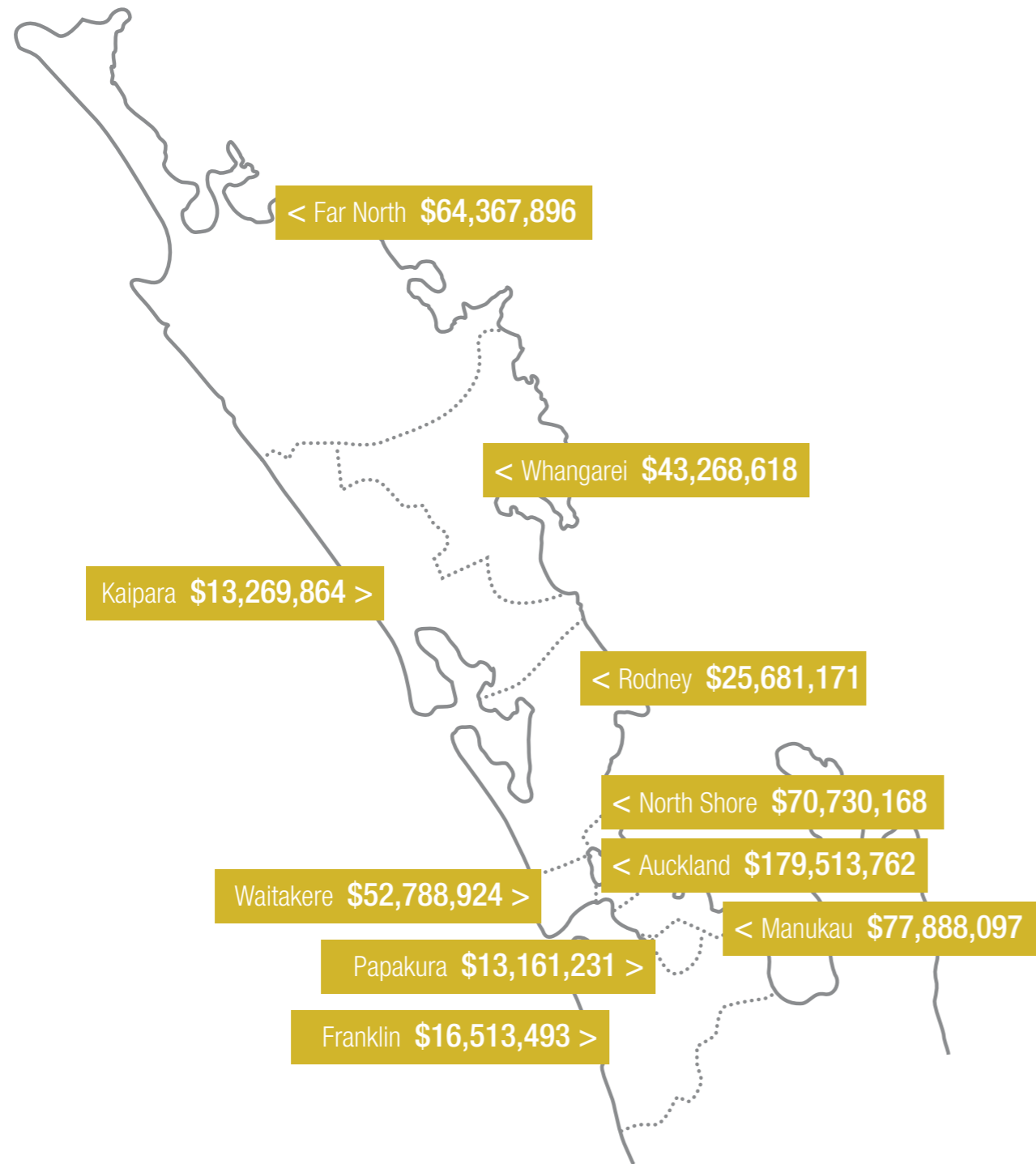
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GRANTS DISTRIBUTED SINCE THE TRUST WAS FORMED IN 1988



Regional + others **\$258,741,847**  
**GRAND TOTAL \$815,925,071**

25th Anniversary



A \$15,000 GRANT

IN 2012 HELPED KEEP THE ART IN THE DARK SHOW A FREE EVENT IN AUCKLAND'S WESTERN PARK

2012

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GRANTS AWARDED IN THIS SECTOR

\$3,471,517

# OF GRANTS

158

% OF THIS YEAR'S TOTAL GRANTS

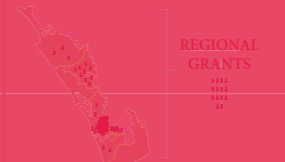


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



## Arts & Culture

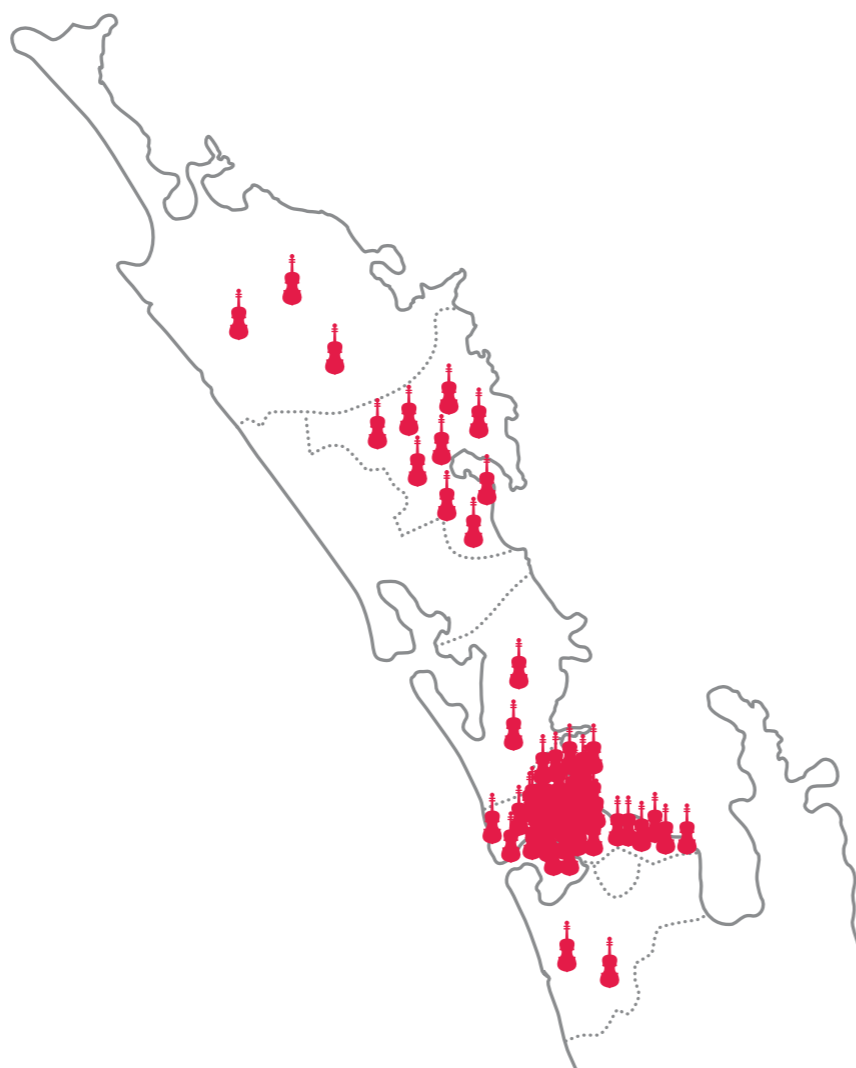


*The Trust supports creative projects and organisations that aim to foster access, engagement and experience in the arts.*

Click to close



### DENSITY OF GRANTS BY REGION



REGIONAL GRANTS



...c also got into the  
h dogs and their  
glow-sticks, others  
wellery and head-  
s and even a few  
-suits.

...people got into  
experience," says  
n display were more  
and we're incredibly  
r fourth year.

...team is committed  
and talent to New  
of the world. Kiwi  
ght to ignore."



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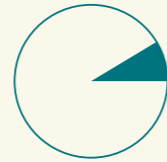
GRANTS AWARDED IN THIS SECTOR

\$1,836,463

# OF GRANTS

14

% OF THIS YEAR'S TOTAL GRANTS

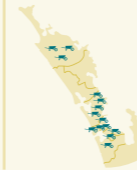


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



# Community Building Projects



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



*Mangonui Cruising Club was among grant recipients.*

were also made for infrastructure projects which were regionally significant.

The Trust looked for community building projects that supported strong community involvement, with the aim of improving participation in community activities and social interaction. The projects were expected to have strong project management and proof of community need.

The final funding decisions were made in December 2012. Grants were made for a range of costs, including the building of new facilities that served as a meeting place for the community; building renovations; building modifications; building expansions or upgrades which increased an organisation's ability to serve the community.

## CBP overview

### IMPROVING COMMUNITY PARTICIPATION

In the 2012/13 year ASB Community Trust supported community building projects where there was strong community involvement, or where the project had regional significance.

Fourteen community building projects were funded, with grants ranging from \$40,000 to \$300,000.

In making the funding decisions, the Trust looked for evidence of collaboration and community engagement, while grants

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GRANTS AWARDED IN THIS SECTOR

\$2,837,263

# OF GRANTS

128

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



# Community Wellbeing



*The programme supports whānau to change behaviours through knowledge and understanding.*

*Te Kahui Mana Ririki*

## CHILD ABUSE TARGETED

The Tikanga Whakatipu Ririki programme, providing positive parenting models to end Māori child abuse, has helped more than 1,600 families in the past 12 months.

Designed by community organisation Te Kahui Mana Ririki to respond to disproportionately high Māori child abuse rates, the strategy supports families to change behaviours through knowledge and understanding about their own culture and history, says Mana Ririki Director Anton Blank.

“Parents need to have some expectations of themselves as parents and caregivers — and some ideas and vision for their children’s future,” says Anton. “Questions such as what they want for their baby and what kind of adult they want them to be should be at the forefront of parents’ minds. The answers help give direction and commitment to child rearing and help them to recognise the qualities their child has.”

Mana Ririki developed the programme after consultation with more than 400 Māori providers and health and family workers in workshops held around the country.

“The result of the workshops has been the development of material relevant to Māori parents and children that delivers practical techniques and strategies for raising children in a loving, violence-free home. It’s a unique model based on tikanga Māori, and informed by our research of traditional Māori parenting practices,” Anton says.

*We support organisations that respond to the needs identified by our communities, with a focus on innovative programmes that address the underlying causes of social problems.*

Mana Ririki is a member of Every Child Counts, a coalition that includes Save the Children, Barnardos, UNICEF and Plunket, which delivers the strengths-based parenting programme to families.

“The programme is about supporting whānau to change behaviours through knowledge and understanding about their own culture and history,” Anton says.

In 2012 ASB Community Trust granted TKMR \$16,723 towards operating costs.



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GRANTS AWARDED IN THIS SECTOR

\$1,488,710

# OF GRANTS

26

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



## Environment



Recently fenced streams on farmland — helping restore water quality.

WWF — Reconnecting Northland

### AMBITIOUS PROJECT TO RECONNECT NORTHLAND'S ECOSYSTEMS

An ambitious conservation project is underway to restore natural processes and ecosystems across the whole of Northland, supported by The Tindall Foundation and ASB Community Trust.

This region-wide ecological restoration project is being undertaken by WWF-New Zealand and NZ Landcare Trust. The first project at this scale in New Zealand,

the Reconnecting Northland Project (RNP) is unique in taking account of both ecological and social contexts, and groundbreaking in approach, says RNP Manager David Mules.

So far, the project has attracted funding in the region of \$2.5 million over the first five years. ASB Community Trust last year committed \$800,000 over five years. However, the project is long term and will continue for a number of decades – the timescale needed to see improvements in ecological systems at a landscape scale.

In making the funding decision, ASB Community Trust took into consideration that the project will conserve and restore regionally significant or threatened habitats and ecosystems and conserve rare, endangered or threatened native species — high priorities under the Environment sector funding category.

“Connectivity conservation, or large landscape-scale restoration, uses a holistic approach to ‘reconnect’ the landscape,” David says. “It seeks to make space for nature, while including human uses of the land. Concepts such as ecological corridors, buffer zones and riparian strips are used to reconnect a mosaic of ecosystems, so they can function more efficiently as a whole landscape.”

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

WWF-New Zealand Executive Director Chris Howe says Reconnecting Northland will make a significant contribution to restoring the region's biodiversity and creating a sustainable and resilient environment.

“We believe that this approach will provide a template for a new approach to conservation, benefiting people as well as nature,” he says.

More on WWF:



More on Landcare:



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GRANTS AWARDED IN THIS SECTOR

\$2,471,173

# OF GRANTS

63

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



Health



The staff team at drug and alcohol treatment specialist TRANX.

TRANX

## SPECIALISTS TACKLE SILENT ADDICTION

A silent, long-term addiction to benzodiazepines is affecting the lives of thousands of New Zealanders, says drug and alcohol treatment specialist TRANX.

Up to two million doses of these tranquillisers, known as benzos, are prescribed as sleeping tablets each year, says TRANX Chair Shaz Picard. TRANX ends up dealing with the effects of long-term addiction.

Often benzos are prescribed for anxiety, but in the long term they can end up magnifying those symptoms, and withdrawal can be difficult. Shaz estimates that somebody who has been using these

drugs for 40 years can take up to four years to stop, even with help from TRANX.

“It’s the silent addiction,” she says. “People just tend to mellow out. Once someone has become dependent, there is a diversity of physical and psychological effects, but there is very little visible drama when compared to alcohol or methamphetamine (P) and so there’s limited media interest.

“People don’t commit burglaries to feed their benzo addiction, but it is a long-term problem,” she says. “These drugs are best used for short periods, for two to four weeks and then intermittently, not daily. At TRANX we are seeing people who have been prescribed benzos for up to 40 years.”

As a community based alcohol and drug treatment service, TRANX provides counselling, support, education, information and reduction programmes for people struggling with addiction.

It offers counselling, a home detox service, satellites in North Auckland and South Auckland and also trains health professionals to raise awareness.

Shaz says that when benzodiazepines became a controlled class C drug in 1999, the expectation was that user statistics would drop. However, they are still creeping up.

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

“Benzos were originally prescribed to replace barbiturates,” Shaz says. “They were supposed to be the wonder drug to replace barbiturates, but the problems come when they are being prescribed for long periods.”

Last year a \$30,000 Trust grant helped with general operating costs.

“The grant gave us furniture and the technology to get the job done quickly and efficiently,” Shaz says.



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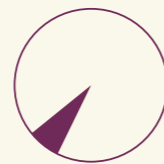
GRANTS AWARDED IN THIS SECTOR

\$1,491,485

# OF GRANTS

25

% OF THIS YEAR'S TOTAL GRANTS

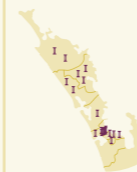


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



## Heritage



The project is run by the Auckland Library Heritage Trust, which supports the Sir George Grey Special Collections. The Heritage Trust says a \$60,000 grant from ASB Community Trust last year will help the Heritage Trust preserve the collection and make it more accessible to the public.

Indexing the database will make it easier for researchers to track the beginnings of organisations such as the New Zealand Opera and Auckland Choral, track the careers of prominent Aucklanders and a range of community singers, players, dancers and musical theatre performers. The historical documents will also help people discover facts about prominent musicians who have visited Auckland in the past, as well as research records of community events such as concert fundraisers for soldiers, Māori showbands and tertiary productions.

Public use of the Auckland Libraries has been increasing every year for the last decade and the amalgamation into Auckland Council has now opened up the Sir George Grey Special Collections to an even wider base of users.

The Auckland Library Heritage Trust says there is a growing demand for information from the music collection from researchers, authors, historians, musicologists and students. However, older items in the

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

collection are at risk of deterioration through wear and tear and inadequate housing and storage.

The cataloguing project aims to make the collection widely accessible, so researchers, writers, students and the wider community will be able to easily find and access information about Auckland's early history and musical heritage. The collection will also be linked with other heritage collections of music scores, sheet music, choral and orchestral music.



*There is a growing demand for access to Auckland's music history.*

*Auckland Library Heritage Trust*

### MUSIC FROM THE PAST PLAYS ON

A plan to make Auckland's music heritage more available to the public has seen 17,000 items of the city's music history indexed into a searchable database.

The collection dates from 1848, including programmes and reviews for concerts in the greater Auckland area and a fascinating insight into the cultural and social life of Auckland.

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\$1,132,802

# OF GRANTS

34

% OF THIS YEAR'S TOTAL GRANTS

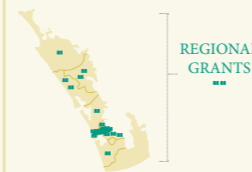


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



## Learning



*The Right Track is changing driver attitudes and behaviour.*

### EDUK8 Charitable Trust

#### DRIVEN TO CHANGE LIVES OF YOUNG PEOPLE

A driving behaviour programme aimed at young drivers apprehended for driving offences offers learning that both changes the young people and their future decision-making processes, says the EDUK8 Charitable Trust which runs the programme.

The programme — Te Ara Tutuki Pai, The Right Track — not only changes driving behaviour and road crash statistics, it also has a profound impact on participants' general life experiences, says EDUK8 Charitable Trust Chairperson John Finch.

John says that, although The Right Track programme is driving-related, the effects reach far more broadly into the lives of the attendees, their whānau and the community.

“Police statistics show that The Right Track has changed the attitudes of the young people to such a degree that not only has the programme changed their driving behaviours, it has also changed their other offending patterns,” says John.

“Statistics confirm an 80% non-recidivism rate since inception in February 2007, which clearly indicates the enormous success of the programme and the longitudinal impact on this high-risk cohort.”

The programme works with young drivers who have been apprehended for driving offences such as drink-driving, speeding and driving without a licence.

They attend 40 hours of interactive sessions over four weeks. Each session involves a particular theme or message, which is presented in a range of ways, providing multi-dimensional, motivational and experiential learning experiences designed for maximum impact.

The success of the project over the past six years means it is now recognised as a model of best practice, addressing concerns identified by the New Zealand Transport Agency's Safer Journeys strategy. It also has strong support from the Police, district court judges, Child Youth and Family, probation and psychological

*We support projects that improve educational outcomes by adding value to the sector, with a focus on innovative projects and lifelong learning.*

services, Auckland Transport's road safety teams, the Fire Service, and St John Ambulance.

The project provides educational outcomes which improve road safety by changing driving behaviour and attitudes. The innovative programme also has lifelong positive impacts for participants and their families.

In 2012 a grant of \$23,523 from ASB Community Trust helped cover EDUK8's operating costs as it expanded to provide nine The Right Track programmes across the Auckland region.



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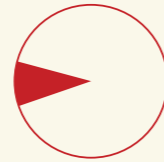
GRANTS AWARDED IN THIS SECTOR

\$1,993,111

# OF GRANTS

14

% OF THIS YEAR'S TOTAL GRANTS

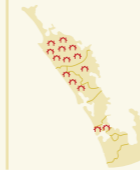


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



Marae



*The marae provides a holistic focal point for the hapū Te Uri O Hau of Ngāti Whātua ki Kaipara*

*Kapehu Marae, Kaipara*

## MODERN AMENITIES AT MARAE

A marae has existed at Mititai, in the north Kaipara, for more than 120 years — but until last year it had to function without a dedicated power supply.

In times past, its remoteness was part of the attraction for groups looking to hire a venue far away from other distractions, but with the diesel generator expensive to run, and constantly breaking down, the marae committee last year decided it was time for Kapehu Marae to enter the modern age.

The marae provides a holistic focal point for the hapū Te Uri O Hau of Ngāti

Whātua ki Kaipara iwi. It is also used by church groups, by high schools for kapa haka and cultural events, and health organisations for hui.

However, the marae committee noticed that bookings were declining because of the electricity issue. To hire the marae, groups had to supply their own diesel, but the marae was also expected to fix the generator immediately if it broke down.

“The marae’s power source was via a second-hand generator that regularly broke down,” says committee member Betty Shine. “Recently it cost us almost \$3,000 to get it fixed and, with the rising cost of diesel, power generation was becoming too costly for us to maintain and repair constantly.”

Last year a grant of \$54,190 from ASB Community Trust enabled the marae to connect up to the national power grid. The marae is also able to provide heating within its facilities now, especially for kaumātua and kuia who would otherwise tend to stay at home during the winter months.

There was a strong support group behind the project, Betty says, especially marae Chairperson Professor Margaret Mutu, kaumātua Manuera Tohu, Treasurer Arthur Noble and caretakers Mereana Broad and Aroha Fairburn.

*We recognise the special role of the Marae to the communities in our region and we will consider funding towards building upgrades and extensions.*

“We would also like to acknowledge all our loyal whānau who attended hui from near and far, bi-monthly, to see this venture come to fruition,” she says. “Now we have a reliable source of power to the marae which is cheaper and enables our whānau, hapū and iwi to return home and utilise our marae more often. There is also less burden on community users and we expect bookings will increase as a result.”



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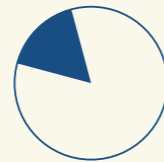
GRANTS AWARDED IN THIS SECTOR

\$3,558,682

# OF GRANTS

133

% OF THIS YEAR'S TOTAL GRANTS

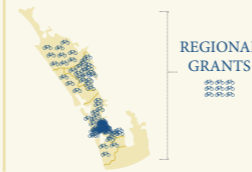


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



# Recreation & Sport



*Water safety skills remain with the students for a lifetime.*



## Safety first for surfers

### HAVE A GO SURFING

The water safety message, mixed with the thrill of surfing, had hundreds of students out in the waves at Piha, West Auckland, last summer.

A grant from the Trust allowed Surfing New Zealand (SNZ) to deliver the Have a Go Surfing programme to 800 students, from more than ten West and South Auckland schools.

Feedback from the schools was that few of their students would have had the chance to experience surfing otherwise, says SNZ Development Manager Lee Ryan.

“This is the biggest learn to surf project that we have ever undertaken,” says Lee.

“Students were bussed out to Piha and had lessons from internationally accredited surf instructors.”

Glen Eden Primary School Deputy Principal Donna Soljan said 44 students joined in and she was impressed by the organisation, the opportunity, the quality of the tutors and the gear the children got to use.

“None of our students had ever surfed before and only a handful had ever swum at Piha,” Donna says. “Our theme this term is ‘Exploring New Horizons’, so this certainly fitted the bill. Our students enjoyed a unique and special experience. It was a fabulous day - one of the best.”

The lessons included a practical lesson in the water, as well as theory on land prior to getting wet. Students learned about the

ocean and ways to stay safe, as well as the best techniques to get up and riding.

“We had a big focus on safety and teaching the kids about rips and currents and how to keep out of danger,” Lee says. “These skills remain with kids for a lifetime. Even if they don’t continue to surf, they can use these skills whenever they go to the beach.”

The Trust supports organisations that focus on community participation and engagement in recreation and SNZ gained funding because its project allows children from lower-decile schools to try a new 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.*

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GRANTS AWARDED IN THIS SECTOR

\$818,956

# OF GRANTS

3

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



DENSITY OF GRANTS BY REGION



## Rescue Services



*The Wander Search tracker quickly finds people, even in built-up areas.*

*Auckland Land Search and Rescue*

### TRACKING UNITS KEEP WANDERERS SAFE

A clever piece of technology used by Auckland Land Search and Rescue, (Auckland LandSAR), assists with tracking down people, when they go missing, who are living with dementia, Alzheimer's, autism and other illnesses which can cause them to wander.

"Police statistics show that at least two people living with dementia are reported missing every day in the Auckland area," says Auckland LandSAR Chair, Roscoe Tait.

Due to the unpredictability of their behaviour, these "wanderers" are often extremely difficult to find, even in built-up urban areas.

"Searching for these wanderers takes a considerable amount of time and resources, for both the Police and for volunteer searchers," Roscoe says.

Now Auckland LandSAR is using a technology called "Wander Search", which enables them to find the wanderers quickly by using radio tracking. Each pendant has a unique frequency which emits a pulse allowing searchers to pinpoint their location quickly.

Auckland LandSAR members are all volunteers, who assist the Police search and rescue team searching for missing people.

A grant of \$8,625 from ASB Community Trust last year allowed Auckland LandSAR to purchase and refurbish 165 of the Wander Search pendants.

"The pendant is worn by the person living with dementia, or autism, so having enough of these pendants allows us to issue them to those within our community who need them," says Roscoe.

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

"Being able to refurbish the pendants also means the pendants can remain with the client longer, ensuring the continuity of ease for locating the client if they wander."

The Wander Search pendant gives caregivers peace of mind knowing that if their loved one goes missing, they can be found faster than by normal search methods.

Wander Search has been shown to save money for other services, as it ensures that the wanderers are found quickly, which reduces the risk of harm occurring to them.



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*The Island Child Charitable Trust aims to strengthen needy families and reduce disparity.*

*The Lifewise Trust has developed a service hub, called Merge Café. This is an integrated system of support to provide pathways to housing for homeless people.*



### *Community Housing Fund*

## **INNOVATIVE FUND SUPPORTS LONG-TERM SOCIAL HOUSING SOLUTIONS**

In 2008, in response to a growing number of requests from the community for grants for housing projects, ASB Community Trust commissioned external research into the housing sector.

One of the key findings was that housing is a core factor in the health and wellbeing of families and the development of strong communities. The Trust identified that social housing was an area where it could have a significant impact and the Community Housing Projects (CHP) fund was introduced.

The fund provided a small number of proven social housing providers with multi-year funding, as well as support for project development, organisational

capacity and evaluation. This was a new model of grant making for the Trust, aimed at making a substantial difference in the community and focused on preventing or resolving homelessness or emergency housing issues for youth, women, and Māori and Pacific communities.

In 2010 the Trust granted seven organisations a total of \$1.95 million in multi-year funding. In 2011 four organisations were granted a total of \$1.44 million. Although no additional organisations received grants in 2012, the Trust continued to provide capacity development support to assist in development and implementation of the 11 programmes underway. The social housing outcomes are likely to be seen over the long term.



# Community Housing



*We support community organisations delivering innovative pilot projects aiming to prevent or solve homelessness, or the need for emergency housing.*

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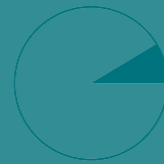
GRANTS AWARDED IN THIS SECTOR

\$1,836,463

# OF GRANTS

14

% OF THIS YEAR'S TOTAL GRANTS

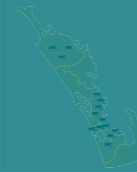


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



# Community Building Projects

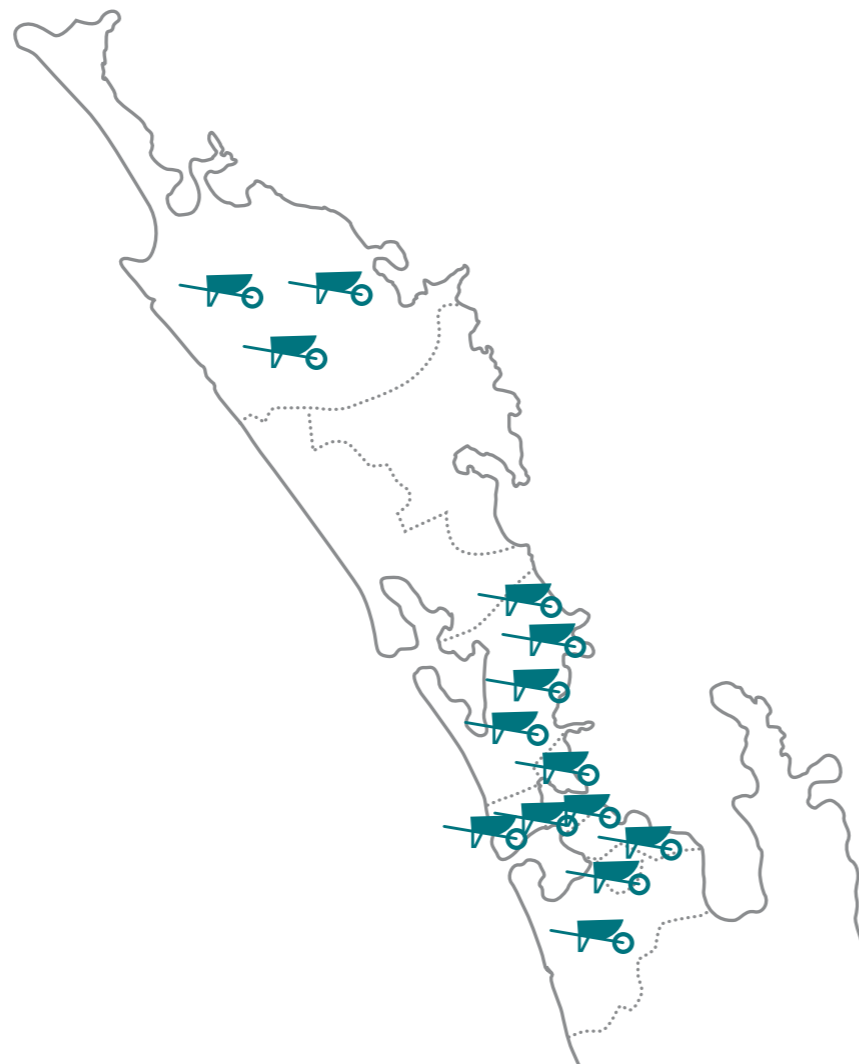


*We aim to support community building projects where there is strong community involvement, or where the project has regional significance.*

[Click to close](#)



## DENSITY OF GRANTS BY REGION



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GRANTS AWARDED IN THIS SECTOR

\$2,837,263

# OF GRANTS

128

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



# Community Wellbeing

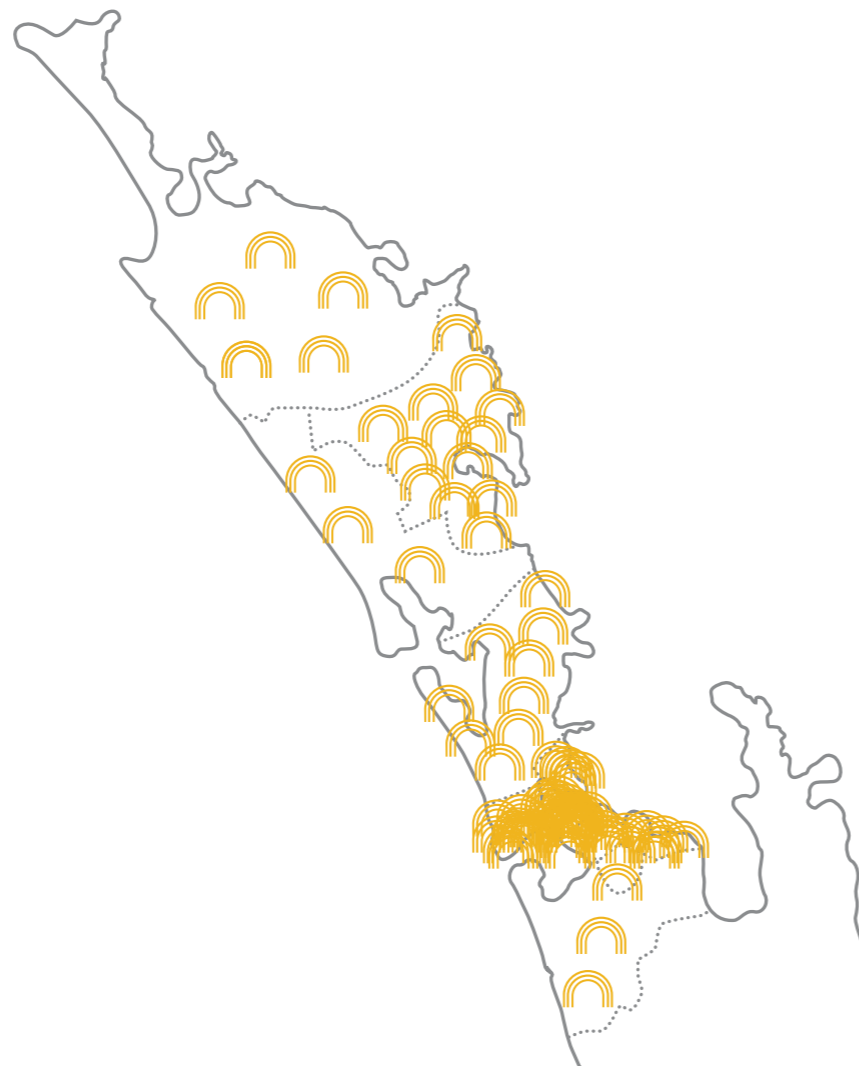


*We support organisations that respond to the needs identified by our communities, with a focus on innovative programmes that address the underlying causes of social problems.*

Click to close



## DENSITY OF GRANTS BY REGION



REGIONAL GRANTS



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GRANTS AWARDED IN THIS SECTOR

\$1,488,710

# OF GRANTS

26

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



## Environment



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

[Click to close](#)



### DENSITY OF GRANTS BY REGION



Executive Director  
Connecting Northland  
to contribute  
to our biodiversity  
and resilient

approach will  
be a new approach to  
engaging people as well as

More on WWF:



More on Landcare:



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*Funding is based on a partnership of self-help.*



## EDUCATION INITIATIVE GAINS MOMENTUM

Groups supported by the Māori and Pacific Education Initiative (MPEI) continued to gain momentum last year.

The initiative began in 2006, when the Trust committed \$20 million to the project, beginning a focused, pro-active intervention aiming to measurably improve education outcomes for young Māori and Pacific people in Auckland and Northland.

In 2009/10, \$11.2 million was granted to six community organisations and in 2011/12 a further \$4 million was allocated to four other education projects. This represents the biggest financial commitment the Trust has ever made to a single enterprise.

The Trust did not fund any new MPEI projects in 2012, but continued to support the nine organisations already funded through capacity support in areas such as

organisational structure, sustainability, planning, governance and evaluation.

Funding is based on a partnership of self-help, with organisations that are owned by the community and have the capacity to deliver on their promises. Our Trustees looked for evidence that the outcomes will advance Māori and Pacific engagement in citizenship, innovation and sustainability. Those outcomes must be measurable, replicable and scalable.

To this end, Kinnect Group ([www.kinnect.co.nz](http://www.kinnect.co.nz)) has been contracted to undertake a comprehensive evaluation of the groups, so both funders and the wider community can learn more about what makes a project succeed.

### SOME EARLY SIGNS OF SUCCESS

One way of measuring the impact of the Trust's funding is to look at educational and training outcomes. Based on those measures, Kinnect's initial findings are that all 47 graduates from the C-Me Trades At School project have moved to either fulltime employment or further education.

The Māori into Tertiary Education (MITE) project has seen 40 Māori graduate students supported and placed into corporate employment. Meanwhile, in Whangarei, He Puna Marama's Leadership Academy of A Company has seen 10 of the 12 eligible boys successfully achieving NCEA Level 1. This compares with a national average for Māori boys of just over 50%.



MPEI



*Mā tātou ano tātou e kōrero  
— We speak for ourselves*

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The Manaiakalani Education Trust works with Māori and Pacific students and their families in 11 schools across Tamaki. It uses e-learning and digital media to better meet students' needs. By equipping students with their own netbooks and supporting teachers, the Manaiakalani project implements a "Learn, Create, Share" learning model.

Evaluation results confirm that students who began the programme at Year 10 in 2011 had a pass rate of over 60% at NCEA Level 1 in 2012. At Tamaki College, NCEA Level 2 results increased from 25% to 51% in 2012, which was the first full year that the Manaiakalani Programme was adopted.

The Manaiakalani Programme continues to gain support from other funders, with Telecom this year supporting the programme. As well, international musician Will.i.am, from the Black Eyed Peas, made a surprise visit this year and gave a donation of \$100,000. The singer, who has a passion for science and technology, found out about the project through his own research when looking for a New Zealand initiative aligned with his interests in supporting technology in education.

Sylvia Park Primary School's Mutukaroa project uses a project co-ordinator as a key link in developing a partnership between home and school. The latest results from the school show students' performance



in the STAR testing model has improved dramatically since 2009, when only 12% were above the national average. Last year 57% of students were above average and a further 40% met the national average grade.

The results are dramatic for those learners who have enjoyed the home-school partnership. They show that to succeed at school, children first need to "learn to read" so that they can "read to learn".

Mutukaroa has had a stunning impact on literacy rates at Sylvia Park school and the government has taken notice. It has committed \$3.5 million to roll the programme out at ten other schools, most of which are in the Auckland region.

Similarly, the High Tech Youth Academy (formerly known as the Computer Club House) has recently been allocated \$2 million of government support to build a

new purpose built High Tech Academy at One Tree Hill College, in Auckland.

*Learning results have been dramatic.*

*More on MPEI:*



*More on Rise UP Trust:*



*More on Trades at School:*



*More on Manaiakalani film festival:*



*More on Mutukaroa:*



MPEI



*Mā tātou ano tātou e kōrero  
— We speak for ourselves*

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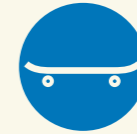
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## Youth Health & Development



*We support and strengthen community organisations which are working to improve health and social outcomes for young people in our region.*

*The fund aims to improve health and social outcomes for young people.*

*Youth Health and Development*

### SUPPORT FOR YOUTH HEALTH AND DEVELOPMENT

The Youth Health and Development (YHD) fund began in 2009, when our Trustees decided to look into the issues young people face. The Trust commissioned research which highlighted that young people experienced a range of unmet needs and that the youth sector was fragmented and underfunded.

As a result, the Trust developed a fund in late 2009, focusing on positive youth development approaches, holistic programmes and on supporting learning and development for both the youth providers and ASB Community Trust. In 2010, \$2.2 million was granted to seven youth providers. In 2011, \$1.9 million was granted to another five providers.

The fund supported programmes which aimed to improve health and social

outcomes for young people, with multi-year grants, capacity development and self-evaluation support for grantees. The Trust continues to support the majority of these providers through this fund, who are in year two and three of their multi-year grants.

The support given to providers was tailored to their individual needs. This has included operational capacity development and evaluation planning, governance review and development, strategic and business planning, mentoring and coaching for project leaders and managers, and support for an increased focus on reflective learning.



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This unique approach has seen a partnership develop between the youth providers, the Trust and capacity development partners. The principal focus has been on improving outcomes for youth in Auckland and Northland. However this fund, and this unique way of working, has also had other benefits including improved collaboration and sharing of information in the youth sector, and building the capacity of the youth providers to improve the delivery of their services and support their long term sustainability.

Being part of the YHD fund has had a positive impact on supporting provider development.

Providers have:

- reported increases in self-assessment of their organisational development, individual development for staff and sector development
- reported an increase in self-evaluation capacity development
- increased their confidence in their own ability to implement and integrate organisational capacity development opportunities
- identified a wide range of significant impacts for young people and other key stakeholders.



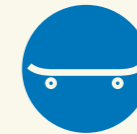
These findings illustrate the value of high engagement and supportive models of philanthropic funding which support provider capacity development, and thereby produce meaningful outcomes for young people, their families/whānau and their communities.

Under the Trust's new strategic plan, which was implemented in April 2013, the YHD projects, along with the Community Housing projects and the Māori and Pacific Education Initiative, are now supported through the Trust's High Engagement Programmes, Catalysts For Change and Key Community Partnerships.



*Youth providers have improved the delivery of their services.*

## Youth Health & Development



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**ARTS & CULTURE**

**A** Action Education Inc \$5,000 Age of Discovery Inc \$9,761 AK Barok Incorporated \$5,000 Aotea Community Radio Trust \$11,100 Art in the Dark Trust \$15,000 Artists Alliance Inc \$60,000 Arts Access Aotearoa Whakahaui Katoa o Hanga Charitable Trust \$20,000 Arts Foundation of New Zealand \$5,000 Artspace (Aotearoa) Trust \$50,000 Atamira Dance Collective Charitable Trust \$50,000 Auckland Art Gallery \$25,000 Auckland Chamber Orchestra Trust Board \$50,000 Auckland Children's Theatre Academy Trust \$8,000 Auckland Choral Society Inc \$15,000 Auckland Festival of Photography Trust \$40,000 Auckland Festival Trust \$250,000 Auckland Robert Burns Association Inc. \$2,000 Auckland Secondary Schools Music Festival Trust \$9,500 Auckland Theatre Company Limited \$100,000 Auckland University Students Association Incorporated \$15,000 Auckland Welsh Choir Inc \$5,000 Auckland Writers' And Readers' Festival Charitable Trust \$80,000 Auckland Youth Choir (Inc) \$15,000 **B** Bach Musica NZ Inc. \$30,000 Bella a Cappella \$5,000 Blue Goose Papermill Charitable Trust \$18,000 **C** Centre City Music Theatre Society Incorporated \$15,000 Centrestage Theatre Company (Orewa) Inc \$10,000 Chamber Music New Zealand Trust Board \$40,000 City Of Sails Auckland Brass Inc. \$20,000 CollaborationNZ Trust \$9,000 Connected Media Charitable Trust \$40,000 Counties Manukau Pacific Trust \$50,000 Culture Heritage and Arts Resource Trust \$30,000 **D** Dance Aotearoa New Zealand Ltd (DANZ) \$20,000 Dargaville Community Cinema Charitable Trust \$20,000 Dargaville Little Theatre Inc \$10,000 **E** EnsembleImpact Educational Trust \$10,000 Estuary Arts Charitable Trust \$20,000 Ethiopian Sport and Cultural Club in New Zealand Incorporated \$7,500 **F** Friends of the Auckland Botanic Gardens Inc \$50,000 **G** Giant Leap Foundation Charitable Trust \$10,000 Going West Trust \$8,500 **H** He Waka Eke Noa Charitable Trust \$40,000 Headland Sculpture On The Gulf Ltd \$50,000 Hindu Heritage Research Foundation (NZ) \$2,000 Holy Trinity Cathedral \$10,000 Howick Children's And Youth Theatre Inc \$15,000 **I** Indian Ink Trust \$50,000 Interacting \$10,000 Italy Star Association Incorporated \$2,000 **J** Japanese Society of Auckland Inc \$10,000 **K** Korean Culture Society \$9,500 Kowhai Festival Society Inc \$2,000 Kumarani Productions \$30,000 Kumeu Arts Centre Inc \$20,000 **L** Lewis Eady Charitable Trust Board \$4,000 **M** Mairangi Arts Centre Trust Board \$20,000 Manukau Orchestral Society Inc \$40,000 Michael King Writers' Studio Trust \$40,000 Migrant Heritage Charitable Trust Inc. \$5,000 Musica Sacra Trust \$4,667 **N** National Youth Theatre Company Trust (NYTC) \$10,000 New Zealand Book Month \$10,000 New Zealand Chinese Federation of Literary and Art Circles Inc. \$10,000 New Zealand Comedy Trust \$25,000 New Zealand Dance Advancement Trust \$40,000 New Zealand Fashion Museum \$5,000 New Zealand Secondary Students' Choir \$10,000 New Zealand Society for Peace, Unity and Human Rights in Sri Lanka \$2,500 New Zealand String Quartet Trust \$9,000 New Zealand Suzuki Institute Inc. — Auckland Branch \$4,000 Ngati Manuhiri Settlement Trust \$10,000 North Shore Indian Association Inc \$1,810 North Shore Performing Arts Competitions Society Inc \$10,000 Northern Dance Network Inc. \$9,583 Northland Craft Trust \$50,000 Northland Youth Theatre Trust \$15,000 NZ Sculpture OnShore Ltd \$5,000 NZ Somali Women Inc \$10,000 NZTrio Foundation \$20,000 **O** Objectspace \$45,000 Old Library Ltd \$20,000 Opera North Inc \$8,920 Orff New Zealand Aotearoa Inc (ONZA) \$5,750 **P** Pacific Music Awards Trust \$8,000 Pacifica Mamas Arts & Cultural Trust \$6,915 Panacea Arts Charitable Trust \$50,000 Philharmonic Society Inc \$1,500 Play It Strange Trust \$20,000 Playmarket Inc \$50,000 Public Works Performing Arts Collective Inc. \$5,150 **R** Rangmanch of New Zealand Inc \$2,500 Red Leap Theatre Charitable Trust Board \$50,000 Regional Facilities Auckland Trust (The Edge) \$50,000 Rock Quest Charitable Trust \$8,000 **S** Script to Screen—Te Tari Tuhi Kupu a Whakaahua \$20,000 Shakespeare Globe Centre New Zealand \$10,000 Show Me Shorts Film Festival Trust Board \$15,000 South Auckland Woodturners Guild Inc \$2,000 St Matthews Chamber Orchestra Inc. \$9,000 Stage Challenge Foundation \$8,000 Starjam Charitable Trust \$25,000 Storylines Children's Literature Charitable Trust of New Zealand \$50,000 Strike Percussion Trust \$10,000 Synergia Arts and Cultural Trust \$8,000 **T** Taki Rua Productions Society Inc \$6,540 Tamaki Makau Rau Senior Kapa Haka Society \$10,000 Tautai Contemporary Pacific Arts Trust \$70,000 Te Karanga Charitable Trust \$5,000 Te Kowhai Print Trust \$10,000 Te Paepae Ataata Trust \$10,000 Te Reo O Ngati Hine Charitable Trust \$10,000 Te Tuhi Contemporary Art Trust \$10,000 The Actors' Program \$5,000 The Auckland Children's Christmas Parade Trust \$10,000 The Auckland Film Society Incorporated \$16,000 The Auckland Performing Arts Centre at Western Springs Incorporated \$53,000 The Auckland Primary Principals Association Inc. \$10,000 The Auckland Welsh Society New Zealand Incorporated \$5,500 The Audio Foundation \$30,000 The Basement Theatre Trust \$60,000 The Big Idea / Te Aria Nui Charitable Trust \$38,400 The Black Grace Trust \$80,000 The Centre at Kerikeri Ltd. \$16,500 The City Dance and City Ballet Foundation Incorporated \$5,000 The Depot Inc \$10,000 The Ghanaian Association of New Zealand \$5,000 The Howick Little Theatre Inc. \$12,721 The James Wallace Arts Trust \$7,000 The Lake House Trust \$20,000 The Lopdell House Society Inc. \$15,000 The Music Association of Auckland \$5,950 The New Zealand Body Art Trust \$10,000 The New Zealand Book Council Inc. \$50,000 The New Zealand Film Festival \$30,000 The New Zealand Opera Training School Trust \$10,000

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The New Zealand Society of Authors (PEN NZ Inc) \$20,000 The New Zealand Tamil Forum Inc \$2,000 The New Zealand Ukulele Trust \$15,000 The Opera Factory Trust \$30,000 The Polyfest Trust \$30,000 The Rose Garden Community Centre And Theatre \$20,000 The Royal New Zealand Ballet \$150,000 The Uxbridge Community Projects Incorporated \$20,000 Theatre Stampede Charitable Trust \$10,000 Toi Ora Live Art Charitable Trust \$10,000 Tupumaiaga A Niue Trust \$2,150 **V** Variety—The Children’s Charity Inc. \$8,000 Victoria Theatre Trust Board \$30,000 Viva Voce Inc \$10,000 **W** Waiheke Community Art Gallery Inc \$10,000 Waitakere Arts & Cultural Development Trust \$30,000 Waitakere Kiribati Community Association Inc \$5,000 Whakaaro Tahī Community Trust \$10,000 Whakamana Nga Rangatahi Trust \$9,600 Women In Film And Television (NZ) Inc \$30,000 **X** Xcell Trust \$5,000 **TOTAL \$3,471,517**

### **COMMUNITY BUILDING PROJECTS**

**B** Bay Of Islands Yacht Club Inc \$80,000 **E** Estuary Arts Charitable Trust \$150,000 **K** Kumeu Rugby Football & Sports Club Inc \$70,380 **M** Mangonui Cruising Club Inc \$100,000 Mercer Rowing Club Inc \$220,000 **N** Nu Flo Youth Centre Trust \$40,000 **O** Orewa Theatre Trust \$200,000 **P** Ponsonby Cruising Club Inc \$50,000 **T** Te Tai Tokerau Tarai Waka Inc \$300,000 The Belmont Park Racquets Club Inc \$80,000 The No. 4 Air Training Corps Squadron Charitable Trust Board \$50,000 The West Lynn Garden Society Inc. \$170,000 Totara Park Equestrian Centre Trust Board \$150,000 **W** Warkworth Tennis & Squash Club Inc \$176,083 **TOTAL \$1,836,463**

### **COMMUNITY WELLBEING**

**A** Abuse Prevention Services Inc. \$20,000 Adventure Specialties Trust \$50,000 Age Concern Counties/Manukau Inc. \$30,000 Age Concern Mid-North (Inc) \$13,140 Age Concern Rodney Incorporated \$20,000 Aotea Family Support Group Charitable Trust \$20,000 Auckland Cambodian Youth And Recreation Trust \$3,015 Auckland City Mission \$50,000 Auckland Regional Migrant Services Charitable Trust \$37,084 Auckland Sexual Abuse HELP Foundation Charitable Trust \$50,000 Auckland Young Womens Christian Association Incorporated \$33,110 **B** Baptist Union Of New Zealand \$50,000 Beneficiaries Advocacy and Information Service Inc. \$7,115 Big Buddy Mentoring Trust \$30,000 Brainwave Trust Aotearoa \$22,137 Brothers in Arms Charitable Trust Board \$15,741 **C** C.A.R.E. Waitakere Trust \$20,000 Camellia House Trust \$40,000 Catholic Social Services Auckland \$25,000 Chinese New Settlers Services Trust \$30,000 Christians Against Poverty New Zealand \$20,000 Coast Youth Community Trust \$29,955 Communicare-Civilian Maimed Association (Auckland) Inc. \$30,000 **D** Dayspring Trust \$40,000 De Paul House \$30,000 Dress for Success \$24,000 **E** East and Bays Parents Centre Inc. \$5,191 East Auckland Home & Budget Service Charitable Trust \$12,388 Eastern Refuge Society Inc. \$29,000 ECPAT Child Alert Trust \$14,940 Essentially Men Education Trust \$20,000 **F** Family Action—Whanau Toa \$50,000 Family Start Manukau \$30,000 Family Support (Mid North) \$14,753 Father and Child Trust \$10,788 Franklin Family Support Trust \$50,000 Funding Information Service \$18,167 **G** Grandparents Raising Grandchildren Trust \$24,000 **H** Habitat For Humanity (Northland) \$5,261 Habitat for Humanity Auckland Ltd. \$30,000 Helensville Women & Family Centre \$20,650 Hestia Rodney Women’s Refuge Inc \$30,000 Hibiscus Coast Family Services Inc. \$17,154 Home & Family Counselling Inc \$50,000 Homebuilders Family Services North Rodney Inc \$38,675 Hope Unlimited Trust \$10,317 **I** Institute of Directors In New Zealand Inc \$20,000 Inter-Church Northland Urban Rural Mission Inc. \$6,119 Iosis Ltd \$50,000 **K** Kaitaia And District Age Concern Regional Council Inc. \$11,478 Kaitaia People’s Centre/Nga Hoe Awhina Inc \$3,587 Kerikeri/Kaeo Community Foodbank \$4,000 Kia Timata Ano Trust \$19,114 Kidz Social Services Charitable Trust \$3,500 Korean Women’s Association of New Zealand Incorporated \$800 **L** Living Without Violence (Waiheke Network) Incorporated \$10,000 **M** Man Alive Charitable Trust \$30,000 McLaren Park and Henderson South Community Initiative Inc. \$18,000 Migrant Action Trust \$15,861 Miriam Centre Child Abuse Treatment And Research Trust \$30,000 Monte Cecilia Housing Trust \$30,000 MSSAT Auckland Inc. \$6,328 **N** New Zealand African Welfare Service Board \$2,000 North Harbour Living Without Violence Inc \$30,000 North Shore Centres Of Mutual Aid Inc \$10,266 North Shore Community & Social Service Council Inc \$19,960 North Shore Women’s Centre \$20,000 NZ Federation of Family Budgeting Services Inc \$25,000 **O** One Double Five Where Roopu Community House Trust \$30,000 Otamatea Community Services Inc. \$14,708 Otangarei Trust \$10,779 **P** Pakuranga Inter-



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Church Charitable Trust \$17,000 Papakura Support and Counselling Centre Inc \$15,500 Parent Aid Central West Auckland Inc. \$5,000 Parent Aid Kaipara Inc \$8,472 Parent Aid Waitakere Inc \$10,946 Parent Port Inc \$8,438 Parent Port North Inc \$5,500 Parent to Parent New Zealand Inc. \$30,000 Parents Inc. \$30,000 Pillars Inc. \$40,000 Presbyterian Support (Northern) \$45,000 **R** Rainbow Youth Inc. \$13,481 Rape Crisis (Auckland) Inc. \$30,000 Relationships Aotearoa Inc. \$30,000 **S** Shakti Community Council Inc \$50,000 South Kaipara Men's Trust \$15,000 Springboard Community Works \$15,000 Stop Demand Foundation \$5,478 Support Of Sexually Abused For Dargaville And Districts Inc \$14,319 **T** Tai Tokerau Emergency Housing Charitable Trust \$31,701 Tamaki Community Development Trust \$25,000 Te Aho Tapu Trust \$30,000 Te Awaroa Youth Club Trust \$20,000 Te Hana Community Development Charitable Trust \$50,000 Te Kahui Mana Ririki Trust \$16,723 Te Korowai Aroha Pumau Inc \$36,130 Te Ukaipo Mercy Initiatives For Rangatahi \$50,000 Te Waipuna Puawai Mercy Oasis \$30,000 The Auckland Women's Centre Inc. \$30,000 The Friendship House Trust \$30,000 The Inner City Women's Group \$22,364 The Inspiring Communities Trust \$35,243 The Kids Help Foundation Trust \$20,000 The Manukau East Council of Social Services Inc. (MECOSS) \$4,700 The New Zealand Federation of Voluntary Welfare Organisations Inc. \$10,000 The Pa O Te Ora Charitable Trust \$11,700 TOA Pacific Inc. \$20,000 Tornado Youth Community Trust \$35,804 Toughlove Auckland Inc \$10,000 Training and Budget Services Inc \$18,704 Tryphina House Whangarei Women's Refuge Inc \$14,700 **V** Violence Free Waitakere Inc \$10,000 VisionWest Community Trust \$30,000 Volunteering Auckland Trust \$20,000 **W** Waiheke Budgeting Services Trust \$10,000 Waiuku Family Support Network Community Trust \$15,829 Waves Trust \$26,000 West Auckland Parents Centre \$5,651 Whangarei Accessible Housing Trust \$18,572 Whangarei Anglican Care Trust \$15,000 Whangarei Migrant Centre Inc \$4,846 Whangarei Rape Crisis Inc. \$14,745 Women's Centre—Rodney Inc \$12,000 Women's Centre Waitakere City \$16,978 Women's International Newcomers Group Social Incorporated Inc \$2,658 **Y** Youthline Auckland Charitable Trust \$40,000 **Z** Zeal Education Trust (Waitakere) \$10,000 **TOTAL \$2,837,263**

**ENVIRONMENT** **A** Aroha Island Charitable Trust \$22,536 **B** Bay of Islands Maritime Park Inc \$46,100 **C** Community Business & Environment Centre Co-Operative Society Limited \$21,900 **F** Friends of Maungawhau Inc. \$7,540 Friends of Rangikapiti Reserve Society Inc. \$22,000 Friends Of The Whau Inc. \$30,000 **G** Glenfern Sanctuary Charitable Trust \$8,808 Great Barrier Island Charitable Trust \$20,000 **H** Hauraki Gulf Conservation Trust \$69,109 **K** Kaipatiki Project Inc. \$40,000 Kiwipedia Limited \$9,660 **M** Mahinepua-Radar Hill Landcare Group Inc. \$12,700 Miranda Naturalists Trust \$16,000 Motuihe Trust \$85,000 Motuora Restoration Society Inc. \$19,988 **N** New Zealand Fairy Tern Charitable Trust \$25,116 **P** Project Litefoot Trust \$80,000 **R** Royal Forest & Bird Protection Society—North Shore \$33,181 **T** Tawharanui Open Sanctuary Society Inc \$33,210 Te Arai Beach Preservation Society Inc \$11,000 The Pukenui/Western Hills Forest Charitable Trust \$29,000 The Sanctuary Charitable Trust \$22,384 **W** Waiheke Resources Trust \$15,000 Whangarei Native Bird Recovery Centre Inc. \$7,218 Whangaruru North Residents and Ratepayers Association Incorporated \$1,260 World Wide Fund for Nature New Zealand \$800,000 **TOTAL \$1,488,710**

**HEALTH** **A** A.I.M. (Adults in Motion) Inc \$4,700 Abilities Inc. \$4,800 ADHD Association Inc \$4,800 Allergy New Zealand Inc \$36,300 Alzheimers Auckland Charitable Trust \$38,000 Aphasia New Zealand (APHASIANZ) Charitable Trust \$6,300 Asthma Society (Northland) Inc. \$25,190 Auckland Disability Providers Network \$6,900 Auckland District Kidney Society Inc. \$50,000 Auckland Maternity Services Consumer Council \$5,760 Auckland Women's Health Council Inc \$5,300 Autism New Zealand Inc \$20,000 **B** Body Positive Inc \$27,000 **C** Children's Autism Foundation \$11,755 **D** Deaf Aotearoa New Zealand Inc \$10,646 Diabetes New Zealand Inc \$50,000 Diabetes NZ Auckland Inc. \$25,000 Doctors for Sexual Abuse Care \$32,593 **E** Energy Efficiency and Conservation Authority \$1,000,000 **G** Glaucoma New Zealand \$28,000 Grow New Zealand Inc. \$4,572 **H** Hearing Dogs for Deaf People New Zealand \$23,278 Horses For Healing Charitable Trust \$3,000 **I** Integrated Neurological Rehabilitation Foundation \$28,000 **J** Justice Action Group Inc \$7,000 **K** Kaitaia Group of Riding for the Disabled Association Inc. \$4,725 **L** Linking Hands Inc. \$5,596 **M** Manaia Heath PHO Ltd \$150,000 Mental Health



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Foundation of New Zealand \$30,000 Mid-way in Northland Day Services Trust \$15,000 Miscarriage Support Auckland Inc \$2,714 Mobility Assistance Dogs Trust \$47,000 Muscular Dystrophy Northern Incorporated \$12,000 **N** New Dawn Partnership Inc \$28,000 North Shore Community Health Network Inc \$38,000 Northland Disabled Charitable Trust \$33,782 Northland Multiple Sclerosis Society Inc \$4,773 **P** Parkinsonism Society Auckland Inc. \$20,000 PHAB Association (Auckland) Inc \$38,000 Positive Women Inc \$23,000 Post Natal Distress Support Network Trust \$4,300 **R** Recreate NZ \$23,000 Refugees As Survivors New Zealand Trust \$50,000 RMH Auckland Trust \$38,000 Royal New Zealand Plunket Society Mangere Branch Inc \$3,000 **S** Sports Recreation And Outdoors Trust \$3,500 Stewart Rehabilitation Services New Zealand Trust \$25,000 Stroke Foundation Northern Region Inc \$50,000 Stuttering Treatment and Research Trust \$14,300 **T** Te Oranga Kaumatua Kuia Disability Support Services Trust \$38,000 The Agape Homes Trust \$21,147 The Auckland Asthma Society Inc. \$40,000 The Brain Injury Association (Auckland) Inc \$38,000 The Brain Injury Association Northland Inc \$14,918 The Cochlear Implant Foundation of New Zealand \$25,000 The Motor Neurone Disease Association of New Zealand (Inc.) \$10,000 The Raukauri Music Therapy Trust \$38,000 Tiaho Trust \$17,431 Tranx, Drug and Alcohol Services Inc \$30,000 **U** Unique Families Inc. \$16,000 **W** Waiheke Island Supported Homes Trust \$11,393 Well Women and Family Trust \$38,000 Women's Health Action \$10,700 **TOTAL \$2,471,173**

**HERITAGE** **A** Anawhata Museum Trust \$6,678 Anglican Parish Of Henderson \$4,721 Auckland Botanical Society Inc \$5,000 Auckland Library Heritage Trust \$60,000 **C** Charlotte Museum Trust \$10,000 **H** Helensville and District Historical Society Inc \$80,000 Howick & Districts Historical Society Inc \$30,000 **K** Kinder House Society Inc \$9,200 **M** Mangawhai Historical Society Inc \$150,000 Motutapu Island Restoration Trust \$50,000 **N** National Oral History Association of New Zealand Incorporated \$4,050 New Zealand National Maritime Museum Trust Board \$40,000 NZ Association of Rationalists & Humanists Inc \$15,000 **O** Otamatea Kauri & Pioneer Museum Board \$14,677 **P** Papakura and District Historical Society Inc \$9,731 Progressive Paparoa Inc. \$3,268 **S** St Paul's Anglican Church—Flat Bush \$40,000 St Stephen's Presbyterian Church (Ponsonby) \$50,000 **T** Te Tohu Taakaro O Aotearoa Charitable Trust \$20,000 The Friends of Onehunga Community House Inc \$50,000 The Marsden Cross Trust Board \$200,000 Toroa Preservation Society Inc \$120,000 **W** Waitangi National Trust \$500,000 Whananaki Primary School \$5,000 Whangaroa County Museum and Archive Society Inc \$14,160 **TOTAL \$1,491,485**

**LEARNING** **A** Ace Space—The Waitakere Learning Shop Inc. \$20,000 Adult Literacy Franklin Inc. \$9,184 Adult Literacy Tamaki Auckland Inc \$30,000 Auckland Observatory & Planetarium Trust \$23,326 Auckland Workers Educational Association Inc. \$32,400 **C** Central Auckland Parents Centre Inc. \$3,830 Crosspower Ministries Trust \$30,000 **E** EDUK8 Charitable Trust \$23,523 English Language Partners Auckland Central Inc. \$9,793 English Language Partners North Shore Inc \$20,000 English Language Partners Northland \$7,188 **F** Far North Adult Literacy Trust \$25,566 First Foundation \$60,000 **G** Great Potentials Foundation \$100,000 **H** HIPPY South Kaipara Charitable Trust \$31,550 **L** Leadership New Zealand Trust Board \$25,000 Literacy North Shore Inc \$28,000 **N** Northland TV Charitable Trust \$10,000 NZ Ethnic Employment Education and Youth Development Charitable Trust \$70,000 **P** Pasifika Literacy Programme \$25,000 Pt England Primary School \$45,000 **S** SPELD Auckland Inc. \$17,269 **T** Tangata Whenua, Community & Voluntary Sector Research Centre \$31,000 Te Hononga ki nga Tupuna Trust \$30,000 Te Puawai O Te Kotahitanga Education Trust \$30,000 Te Roroa Learning Assistance Charitable Trust \$10,000 The Gifted Children's Advancement Charitable Trust Board \$50,000 The Kauri Trust \$20,000 The Lifewise Trust \$30,000 The Waitakere City Improving School Attendance Programme (I.S.A.P) Trust \$30,000 **U** United Maori Mission Inc \$200,000 **W** Waiheke Adult Literacy Inc. \$15,000 Waitakere Adult Literacy Inc \$25,000 Waitakere City Workers Educational Association Inc. \$15,173 **TOTAL \$1,132,802**



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**MARAE** **K** Kapehu Marae \$54,190 Kenana — Te Ranginui Marae Trust \$11,728 **M** Mataitaua Marae Committee \$150,485 Motuti Marae Trustees \$23,849 **N** Nga Tai Whakarongorua Marae \$112,246 Ngatiwai O Aotea Kawa Marae \$200,000 Ngawha Marae Trustee Komiti \$236,177 **R** Ripia Marae \$147,000 **T** Te Aroha Otangaroa Marae \$203,793 Te Maata Marae \$129,000 Tuparehuia Marae Committee Charitable Organisation \$42,334 **W** Waikaraka Marae \$280,659 Waimanoni Marae Trustees \$183,150 Whakapara Marae Trust \$218,500 **TOTAL \$1,993,111**

**RECREATION & SPORT** **A** AFL New Zealand Inc \$50,000 Ardmore Marist Rugby & Sports Club Inc \$8,179 Athletics Auckland Inc \$22,350 Athletics New Zealand (Inc.) \$20,000 Auckland Badminton Association Inc \$79,393 Auckland United Softball Club Inc \$8,300 Awanui Sports Complex Inc \$24,563 **B** Badminton North Harbour Inc \$20,000 Basketball Development Trust \$35,944 Bay of Islands Amateur Swimming Club Inc \$8,300 Bike NZ Inc \$50,000 Birkenhead United Association Football and Sports Club \$40,000 Bream Bay Swimming Club Inc \$10,000 **C** Canoe Racing New Zealand Incorporated \$50,000 Clarks Beach Golf Club Inc. \$49,000 Clevedon Pony Club \$45,000 Coast Swimming Club Inc \$8,300 Cook Islands Outriggers Association Inc \$10,000 Counties Manukau Gymnastics Inc. \$8,300 Counties Manukau Rugby Football Union Inc. \$50,000 Counties Manukau Sports Foundation \$86,500 Counties-Manukau Orienteering Club Inc \$6,870 Counties-Manukau Touch Association Inc \$8,300 **D** Dargaville Bowling Club Inc. \$5,819 **E** Eastern Suburbs Association Football Club Inc \$8,300 Eastern Suburbs Gym Club Inc \$6,454 Eventing Auckland Inc \$8,300 **F** Fiji Community Association of Auckland Inc \$8,300 French Bay Yacht Club Inc \$6,640 **G** Glendowie Tennis Club Inc \$39,995 Grafton United Cricket Club Inc \$27,112 Greater Auckland Coaching Unit \$100,000 Gymnastics Community Trust \$8,300 **H** H.T. United Netball Club Inc \$8,514 Harbour Sport Trust \$100,000 Hibiscus Coast Netball Centre Inc \$50,000 Howick Gymnastics Club Inc \$8,300 Howick Pakuranga Hockey Club Inc \$10,000 Howick Softball Club (Fencibles) Inc \$7,916 **K** Kai Iwi Lakes Water Ski Club Inc \$5,375 Kaikohe Rugby Football And Sports Club Inc \$45,594 Kaipara Recreational Facilities Inc \$50,000 Kaitaia Gymnastic Club Inc \$5,000 Kaukapakapa Pony Club Inc \$2,408 Kaukapakapa Sports and Bowls Club Inc. \$24,825 Kerikeri Gymnastics Club \$9,500 Kohekohe Hockey Club Incorporated \$10,000 **M** Mahurangi Gymnastics Club Inc \$1,250 Mairangi Bay Tennis Club Inc \$36,596 Manly Sailing Club Inc \$9,200 Manukau City Association Football Club Inc \$7,473 Manukau Rovers Rugby Football Club Inc \$8,085 Mid-Northern Rugby Football Club Inc \$26,319 Mt Eden Swimming Club Inc \$2,894 Mt Wellington Amateur Swimming Club Inc \$7,540 **N** Netball North Harbour Inc \$50,000 New Zealand Blind Lawn Bowling Association Inc \$5,000 New Zealand Tamil Society Inc. \$8,300 New Zealand Tongan Sports and Cultural Trust \$9,660 Nga Kaihoe o Aotearoa (Waka Ama New Zealand) Inc \$50,000 Nga Papahu Swim Club Inc \$10,000 Ngunguru Bowling Club Inc \$40,000 Ngunguru Golf Club Inc \$9,765 North Harbour Football and Sports Club Inc \$50,000 North Harbour Hockey Association Inc \$20,000 North Harbour Touch Association Incorporated \$12,493 North Harbour Volleyball Association Inc \$39,900 North Shore Croquet Club Inc \$22,555 North Shore Events Centre Trust \$50,000 North Shore United Association Football Club Inc \$7,200 Northland Cricket Association \$8,088 Northland Paraplegic & Physically Disabled Association Inc \$32,000 Northland Suns Basketball Development Trust Board \$40,000 Northwave Amateur Swim Club Inc \$8,300 **O** One Tree Point Bowling Club Inc \$50,000 Oratia United Association Football Club \$7,684 Otahuhu United Association Football Club Inc \$8,300 **P** Pakuranga United Rugby Football Club Inc \$8,300 Parihaka Sports Club Inc \$8,145 Point Chevalier Amateur Athletics Club Incorporated \$6,462 Pointways Pony Club Inc \$8,300 Pt Chevalier Rugby League Football Club \$7,215 Pukekohe Pythons Rugby League Sports Inc \$4,552 Pupuke Schools Waterwise Society Inc \$7,050 **R** Redhills Pony Club Inc. \$16,798 Reels on Wheels Trust \$8,300 Royal Oak Racquets Club Inc. \$50,000 Rugby League Northland Zone of NZRL Inc. \$50,000 **S** Sailability Auckland \$43,200 SANZ Shackleton Sea Scouts \$7,919 Sea Scouts - Te Atatu Endeavour \$27,778 Sk8boarders United Voice \$6,885 Special Olympics New Zealand - Upper North Island Regional Council \$56,000 Spirit Of Adventure Trust Board \$50,000 Sport Northland \$150,000 Sport Waitakere Trust \$100,000 Squash Auckland Inc \$33,584 Surfing New Zealand Inc. \$64,255 **T** Table Tennis New Zealand Incorporated \$27,000 Taiamai Ohaeawai Rugby Football & Sports Club Inc \$2,345 Takapuna Croquet Club Inc \$2,960 Tamaki College Community Recreation Centre \$7,500 Te Atatu Tennis Club Inc. \$50,000 Te Kura o Waikare \$48,613 Te Pai Park Tennis Club Inc. \$50,000 Te Puu Ao Trust \$8,300 Tennis New Zealand Inc. \$124,130 The Auckland Diving Community Trust Board \$20,000 The Auckland Softball Association Inc \$5,158 The Auckland Table Tennis Association Inc. \$50,000



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The Browns Bay Racquets Club Incorporated \$38,646 The Girls' Brigade NZ Inc. \$11,000 The Hibiscus Coast Raiders Rugby League and Sports Club Inc \$10,000 The Mt. Albert Rugby League Football Club Inc \$30,000 The New Zealand Hockey Federation Inc \$78,050 The North Harbour Indoor Bowls Centre Inc \$5,313 The Otiria Union Football And Sports Club Inc \$4,757 The Sir Edmund Hillary Outdoor Pursuits Centre of NZ \$88,591 Three Kings United Football Club Inc \$8,300 Torbay Sailing Club Inc \$8,300 Tu Tangi Ora - South Kaipara Collective Inc \$8,300 **U** United Swimming Club Inc \$8,300 **W** Waimauku Tennis Club Inc \$50,000 Waitakere City Rugby Football & Sports Club Inc \$10,000 Waitemata District Pony Club Inc \$8,300 Wakatere Boating Club Inc \$9,754 West End Rowing Club \$14,280 Western Districts Hockey Club Inc \$10,000 Whangarei Amateur Swimming Club Inc. \$10,000 Whangarei Junior Rugby Union Management Board Inc. \$14,789 Whangarei Young Mariners \$8,300 Wynrs NZ Trust \$38,400 **Y** Yachting New Zealand Inc \$80,000 **TOTAL \$3,558,682**

**RESCUE SERVICES** **A** Auckland Land Search and Rescue \$8,625 **C** Coastguard Northern Region Inc. \$470,595 **S** Surf Life Saving Northern Region Inc \$339,736 **TOTAL \$818,956**



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GRANTS AWARDED IN THIS SECTOR

\$2,471,173

# OF GRANTS

63

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



REGIONAL GRANTS

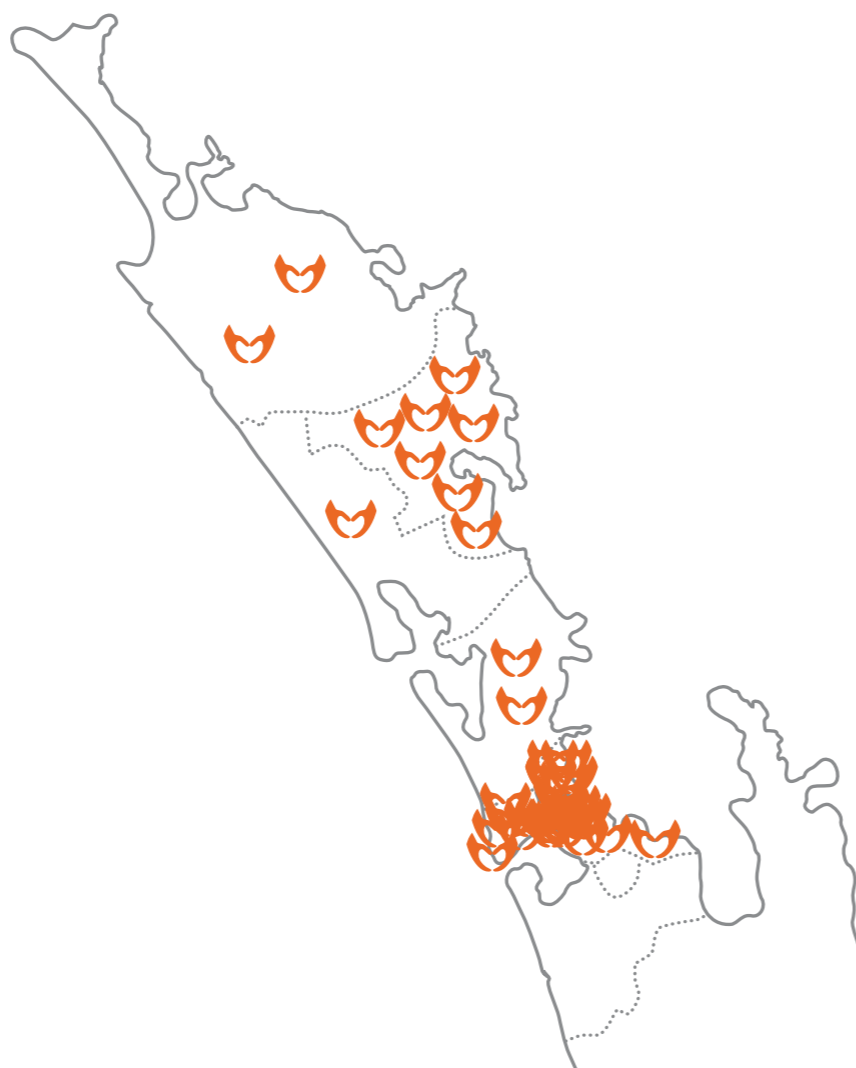
## Health



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### DENSITY OF GRANTS BY REGION



REGIONAL GRANTS



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

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## SUMMARY STATEMENTS OF COMPREHENSIVE INCOME FOR THE YEAR ENDED 31 MARCH 2013

|                                                                                                                                                  | GROUP 2013<br>\$000 | GROUP 2012<br>\$000 | TRUST 2013<br>\$000 | TRUST 2012<br>\$000 |
|--------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------------------|---------------------|---------------------|
| Revenue (Loss) from Investments                                                                                                                  | 81,165              | (10,007)            | 81,165              | (10,007)            |
| Less:                                                                                                                                            |                     |                     |                     |                     |
| Fund Management, Custodian and Advisory Fees                                                                                                     | (836)               | (760)               | (836)               | (760)               |
| Investment Margin                                                                                                                                | 80,329              | (10,767)            | 80,329              | (10,767)            |
| Other Income                                                                                                                                     | 2,151               | 2,186               | 2,151               | 2,186               |
| Administration Expenses                                                                                                                          | (5,482)             | (6,059)             | (5,118)             | (5,604)             |
| Grants Committed during the year to Community Groups                                                                                             | (21,100)            | (36,624)            | –                   | (14,177)            |
| Grants Committed during the year to ASB Community Trust Charitable Purposes Limited for granting to Community Groups in current and future years | –                   | –                   | (38,500)            | (25,272)            |
| Grants Written Back                                                                                                                              | 447                 | 736                 | 255                 | 64                  |
| Grant Refunds Received                                                                                                                           | 15                  | 27                  | 5                   | 11                  |
| <b>SURPLUS (DEFICIT) FOR THE YEAR</b>                                                                                                            | <b>56,360</b>       | <b>(50,501)</b>     | <b>39,122</b>       | <b>(53,559)</b>     |
| Other Comprehensive Income:                                                                                                                      |                     |                     |                     |                     |
| Revaluation Loss on Land and Buildings                                                                                                           | (381)               | –                   | (381)               | –                   |
| <b>Total Comprehensive Income for the year</b>                                                                                                   | <b>55,979</b>       | <b>(50,501)</b>     | <b>38,741</b>       | <b>(53,559)</b>     |

The notes on page 49 are an integral part of these summary financial statements.



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## SUMMARY STATEMENTS OF FINANCIAL POSITION AT 31 MARCH 2013

|                                                                                                                                                          | GROUP 2013<br>\$000 | GROUP 2012<br>\$000 | TRUST 2013<br>\$000 | TRUST 2012<br>\$000 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------------------|---------------------|---------------------|
| Cash at Bank                                                                                                                                             | 2,794               | 7,581               | 2,794               | 7,581               |
| Investments                                                                                                                                              | 1,097,018           | 1,049,310           | 1,097,018           | 1,049,310           |
| Fixed Assets                                                                                                                                             | 8,897               | 4,353               | 8,897               | 4,353               |
| Other Assets                                                                                                                                             | 1,113               | 2,483               | 1,113               | 2,483               |
| <b>Total Assets</b>                                                                                                                                      | <b>1,109,822</b>    | <b>1,063,727</b>    | <b>1,109,822</b>    | <b>1,063,727</b>    |
| Less:                                                                                                                                                    |                     |                     |                     |                     |
| Liabilities (including Outstanding Grants Payable Group:<br>\$29.84 million (2012: \$39.08 million) and Trust: \$3.41 million<br>(2012: \$9.59 million)) | 32,084              | 41,968              | 90,823              | 83,469              |
| <b>NET ASSETS AT 31 MARCH</b>                                                                                                                            | <b>1,077,738</b>    | <b>1,021,759</b>    | <b>1,018,999</b>    | <b>980,258</b>      |
| Represented by:                                                                                                                                          |                     |                     |                     |                     |
| <b>FUNDS</b>                                                                                                                                             |                     |                     |                     |                     |
| Original Capital                                                                                                                                         | 579,106             | 579,106             | 579,106             | 579,106             |
| Capital Maintenance Reserve                                                                                                                              | 314,175             | 306,207             | 314,175             | 306,207             |
| Reserve for Grants                                                                                                                                       | 58,739              | 41,501              | –                   | –                   |
| Asset Revaluation Reserve                                                                                                                                | 511                 | 892                 | 511                 | 892                 |
| Retained Surplus                                                                                                                                         | 125,207             | 94,053              | 125,207             | 94,053              |
| <b>FUNDS AT 31 MARCH</b>                                                                                                                                 | <b>1,077,738</b>    | <b>1,021,759</b>    | <b>1,018,999</b>    | <b>980,258</b>      |

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## SUMMARY STATEMENTS OF CHANGES IN FUNDS FOR THE YEAR ENDED 31 MARCH 2013

|                                           | ORIGINAL<br>CAPITAL<br>\$000 | CAPITAL<br>MAINTENANCE<br>RESERVE<br>\$000 | REAL CAPITAL<br>\$000 | RESERVE FOR<br>GRANTS<br>\$000 | ASSET<br>REVALUATION<br>RESERVE<br>\$000 | RETAINED<br>SURPLUS<br>\$000 | TOTAL FUNDS<br>\$000 |
|-------------------------------------------|------------------------------|--------------------------------------------|-----------------------|--------------------------------|------------------------------------------|------------------------------|----------------------|
| <b>GROUP</b>                              |                              |                                            |                       |                                |                                          |                              |                      |
| Opening Balance at 1 April                | 579,106                      | 306,207                                    | 885,313               | 41,501                         | 892                                      | 94,053                       | 1,021,759            |
| Total Comprehensive Income:               |                              |                                            |                       |                                |                                          |                              |                      |
| Surplus for the year                      | –                            | –                                          | –                     | –                              | –                                        | 56,360                       | 56,360               |
| Revaluation Loss on Land and Buildings    | –                            | –                                          | –                     | –                              | (381)                                    | –                            | (381)                |
| Total Comprehensive Income for the year   | –                            | –                                          | –                     | –                              | (381)                                    | 56,360                       | 55,979               |
| Transfer to Capital Maintenance Reserve   | –                            | 7,968                                      | 7,968                 | –                              | –                                        | (7,968)                      | –                    |
| Net transfer to/(from) Reserve for Grants | –                            | –                                          | –                     | 17,238                         | –                                        | (17,238)                     | –                    |
| <b>Closing Balance at 31 March</b>        | <b>579,106</b>               | <b>314,175</b>                             | <b>893,281</b>        | <b>58,739</b>                  | <b>511</b>                               | <b>125,207</b>               | <b>1,077,738</b>     |
| <b>TRUST</b>                              |                              |                                            |                       |                                |                                          |                              |                      |
| Opening Balance at 1 April                | 579,106                      | 306,207                                    | 885,313               | –                              | 892                                      | 94,053                       | 980,258              |
| Total Comprehensive Income:               |                              |                                            |                       |                                |                                          |                              |                      |
| Surplus for the year                      | –                            | –                                          | –                     | –                              | –                                        | 39,122                       | 39,122               |
| Revaluation Loss on Land and Buildings    | –                            | –                                          | –                     | –                              | (381)                                    | –                            | (381)                |
| Total Comprehensive Income for the year   | –                            | –                                          | –                     | –                              | (381)                                    | 39,122                       | 38,741               |
| Transfer to Capital Maintenance Reserve   | –                            | 7,968                                      | 7,968                 | –                              | –                                        | (7,968)                      | –                    |
| Net transfer (from)/to Reserve for Grants | –                            | –                                          | –                     | –                              | –                                        | –                            | –                    |
| <b>Closing Balance at 31 March</b>        | <b>579,106</b>               | <b>314,175</b>                             | <b>893,281</b>        | <b>–</b>                       | <b>511</b>                               | <b>125,207</b>               | <b>1,018,999</b>     |

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## SUMMARY STATEMENTS OF CHANGES IN FUNDS FOR THE YEAR ENDED 31 MARCH 2012

|                                           | ORIGINAL<br>CAPITAL<br>\$000 | CAPITAL<br>MAINTENANCE<br>RESERVE<br>\$000 | REAL CAPITAL<br>\$000 | RESERVE FOR<br>GRANTS<br>\$000 | ASSET<br>REVALUATION<br>RESERVE<br>\$000 | RETAINED<br>SURPLUS<br>\$000 | TOTAL FUNDS<br>\$000 |
|-------------------------------------------|------------------------------|--------------------------------------------|-----------------------|--------------------------------|------------------------------------------|------------------------------|----------------------|
| <b>GROUP</b>                              |                              |                                            |                       |                                |                                          |                              |                      |
| Opening Balance at 1 April                | 579,106                      | 292,265                                    | 871,371               | 41,010                         | 892                                      | 158,987                      | 1,072,260            |
| Total Comprehensive Income:               |                              |                                            |                       |                                |                                          |                              |                      |
| Deficit for the year                      | –                            | –                                          | –                     | –                              | –                                        | (50,501)                     | (50,501)             |
| Total Comprehensive Income for the year   | –                            | –                                          | –                     | –                              | –                                        | (50,501)                     | (50,501)             |
| Transfer to Capital Maintenance Reserve   | –                            | 13,942                                     | 13,942                | –                              | –                                        | (13,942)                     | –                    |
| Net Transfer to/(from) Reserve for Grants | –                            | –                                          | –                     | 491                            | –                                        | (491)                        | –                    |
| <b>Closing Balance at 31 March</b>        | <b>579,106</b>               | <b>306,207</b>                             | <b>885,313</b>        | <b>41,501</b>                  | <b>892</b>                               | <b>94,053</b>                | <b>1,021,759</b>     |
| <b>TRUST</b>                              |                              |                                            |                       |                                |                                          |                              |                      |
| Opening Balance at 1 April                | 579,106                      | 292,265                                    | 871,371               | 2,567                          | 892                                      | 158,987                      | 1,033,817            |
| Total Comprehensive Income:               |                              |                                            |                       |                                |                                          |                              |                      |
| Deficit for the year                      | –                            | –                                          | –                     | –                              | –                                        | (53,559)                     | (53,559)             |
| Total Comprehensive Income for the year   | –                            | –                                          | –                     | –                              | –                                        | (53,559)                     | (53,559)             |
| Transfer to Capital Maintenance Reserve   | –                            | 13,942                                     | 13,942                | –                              | –                                        | (13,942)                     | –                    |
| Net Transfer (from)/to Reserve for Grants | –                            | –                                          | –                     | (2,567)                        | –                                        | 2,567                        | –                    |
| <b>Closing Balance at 31 March</b>        | <b>579,106</b>               | <b>306,207</b>                             | <b>885,313</b>        | <b>–</b>                       | <b>892</b>                               | <b>94,053</b>                | <b>980,258</b>       |

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## SUMMARY STATEMENTS OF CASH FLOWS FOR THE YEAR ENDED 31 MARCH 2013

|                                                     | GROUP 2013<br>\$000 | GROUP 2012<br>\$000 | TRUST 2013<br>\$000 | TRUST 2012<br>\$000 |
|-----------------------------------------------------|---------------------|---------------------|---------------------|---------------------|
| Net cash (outflow) inflow from operating activities | (464)               | 1,590               | (464)               | 1,590               |
| Net cash (outflow) from investing activities        | (4,323)             | (1,071)             | (4,323)             | (1,071)             |
| Net cash (outflow) inflow from activities           | (4,787)             | 519                 | (4,787)             | 519                 |
| Add: Cash at Bank at 1 April                        | 7,581               | 7,062               | 7,581               | 7,062               |
| Cash at Bank at 31 March                            | 2,794               | 7,581               | 2,794               | 7,581               |
| Cash at Bank at 31 March comprises:                 |                     |                     |                     |                     |
| Cash at Bank                                        | 2,794               | 7,581               | 2,794               | 7,581               |

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GRANTS AWARDED IN THIS SECTOR

\$1,491,485

# OF GRANTS

25

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



## Heritage

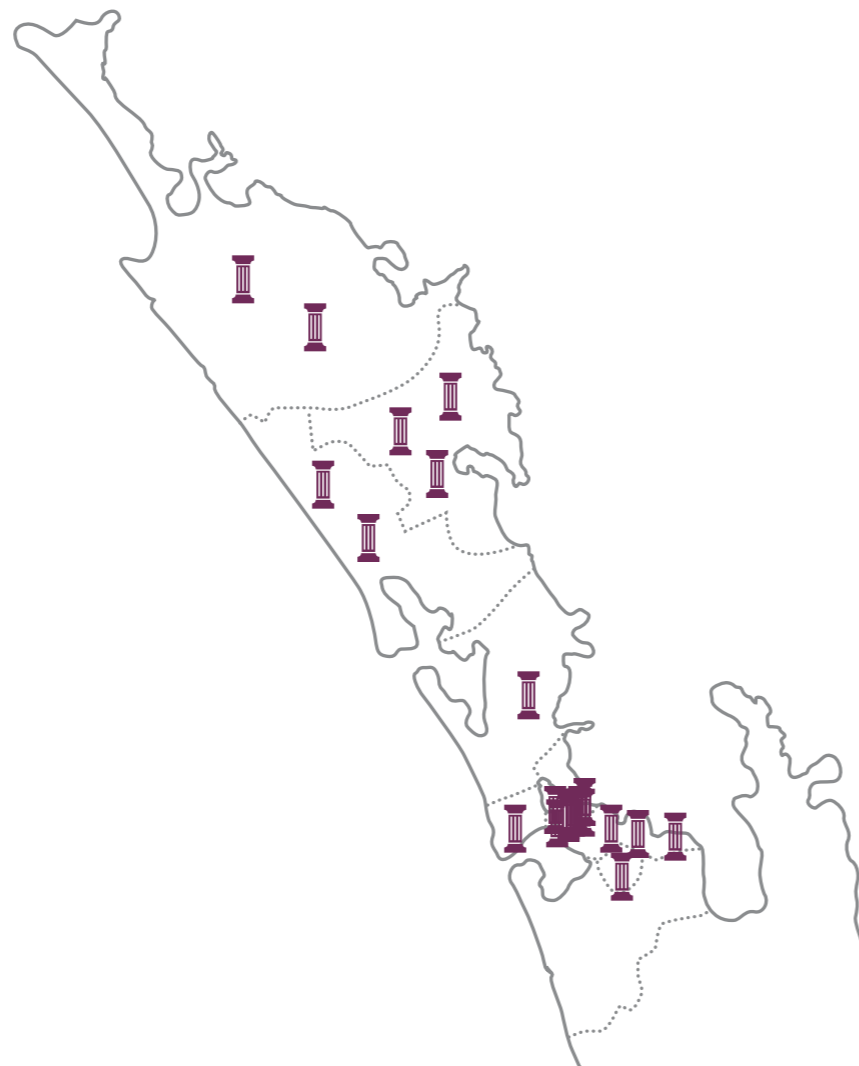


*We support projects and organisations that preserve and promote the physical and cultural heritage of our region.*

[Click to close](#)



### DENSITY OF GRANTS BY REGION



of deterioration  
and inadequate

ct aims to make the  
ossible, so researchers,  
the wider community  
nd and access  
ckland's early history  
The collection  
h other heritage  
cores, sheet music,  
music.



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FROM LEFT:  
*John Slater, Auva'a Unasa  
 Enosa Auva'a, Paula Kearns,  
 Murray Broadbelt,  
 Toni Millar, Alastair Bell,  
 Ken Whitney, Mark Brickell,  
 Lyn Lim, Ian McDougall,  
 Moe Milne, Bill Plunkett,  
 Kim Wright, Bob Leveloff,  
 Precious Clark.*

ASB Community Trust operates under its Trust Deed and the Community Trusts Act 1999.

### BOARD MEMBERSHIP

The Board of Trustees comprises 15 Trustees appointed by the Minister of Finance for a four-year term.

### CONFLICTS OF INTEREST

It is recognised that Trustees will have a wide range of involvement with the community and the potential for conflict of interest will arise from time to time.

To cover this eventuality, any Trustee who has an interest in any matter before the Trust must record that interest in the Trust's Register of Interests.

That Trustee is not counted in the quorum present at the meeting. They may not vote in respect of the matter they have an interest in and must absent themselves from any discussion or consideration of it.

Before business is conducted, the Chair of any meeting of the Trustees asks for the disclosure of any interest in the upcoming business. The minutes of the meeting record any disclosure of interest made, the entry in the Register of Interests of that disclosure and the absence of the Trustee from the meeting while the matter is dealt with.

### BOARD COMMITTEES 2012/13 FINANCIAL YEAR

The Board has formally established sub-committees to assist with the operation of the Trust:

## Trust Governance



### Grants panels

These panels review all applications which have been assessed by the grants team and make recommendations to the full Board of the Trust. They also consider policy and strategy development.

### Investment committee

This committee considers the investment policy, objectives, strategies and asset allocations of the Trust and makes recommendations to the full Board.

The committee reviews the portfolio against benchmarks and fund managers' performance against their benchmarks. The Chief Financial Officer, in consultation with the committee Chair and two other members of the committee, has delegated authority to appoint and terminate fund managers.

### Audit, Finance and Risk committee

This committee is responsible for:

*a. Finance* — This committee is principally responsible for:

- Reviewing monthly and annual financial statements and information prior to submission to the full Board for approval

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- Reviewing annual budgets prior to submission to the full Board for approval
- Reviewing any taxation issues in relation to the Trust
- Consideration of any major expenditure items prior to these being discussed and approved by the full Board
- Investigating the role of social finance as a function of the Trust.

*b. Risk* — This committee is principally responsible for:

- Identifying, assessing and managing business and organisational risk and assisting the Board in the discharge of financial reporting responsibilities
- Reviewing the effectiveness of internal control systems
- Providing a formal forum for the Board, auditors and staff
- Agreeing with the external auditors on the nature, scope and cost of the audit
- Ensuring the Board meets financial reporting requirements and that external reporting of information is of high quality.

### MĀORI AND PACIFIC COMMITTEE

This committee is responsible for the selection of applications funded through the Māori and Pacific Education Initiative and is responsible for the Trust’s funding of marae. The committee also oversees the development and implementation of the Trust’s Māori and Pacific strategies.

### TRUSTEE FEES

| GROUP AND TRUST | 2013<br>\$       | 2012<br>\$       | APPOINTED | RETIRED |
|-----------------|------------------|------------------|-----------|---------|
| E Auva’a        | 18,700           | 16,150           |           |         |
| A Bell          | 17,000           | 12,115           |           |         |
| M Brickell      | 18,700           | 16,193           |           |         |
| M Broadbelt     | 10,908           | –                | Sep-12    |         |
| P Clark         | 8,500            | –                | Oct-12    |         |
| A Green         | –                | 3,841            |           | May-11  |
| P Greenbank     | –                | 2,325            |           | May-11  |
| A Hartley       | 7,083            | 16,143           |           | Aug-12  |
| P Kearns        | 18,700           | 14,059           |           | Apr-13  |
| J Kirk          | –                | 1,366            |           | May-11  |
| K Kohere-Soutar | 7,083            | 13,320           |           | Aug-12  |
| B Leveloff      | 18,700           | 18,670           |           |         |
| L Lim           | 21,250           | 20,189           |           |         |
| B Lythe         | 7,083            | 18,218           |           | Aug-12  |
| I McDougall     | 17,000           | 15,791           |           |         |
| T Millar        | 17,000           | 14,425           |           |         |
| M Milne         | 18,700           | 12,045           |           |         |
| A Ngaro         | –                | 6,040            |           | Oct-11  |
| B Plunkett      | 17,000           | 11,975           |           |         |
| J Slater        | 9,917            | –                | Sep-12    |         |
| K Whitney       | 34,000           | 29,507           |           |         |
| L Wilson        | –                | 3,410            |           | May-11  |
| K Wright        | 9,917            | –                | Sep-12    |         |
|                 | <b>\$277,241</b> | <b>\$245,782</b> |           |         |

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## TRUSTEE MEETING ATTENDANCE

| NAME            |                     | TOTAL BOARD<br>MEETINGS<br>AVAILABLE TO<br>ATTEND | BOARD<br>MEETINGS<br>ATTENDED | COMMITTEE<br>MEETINGS<br>AVAILABLE TO<br>ATTEND | COMMITTEE<br>MEETINGS<br>ATTENDED | OTHER<br>MEETINGS<br>AVAILABLE TO<br>ATTEND | OTHER<br>MEETINGS<br>ATTENDED |
|-----------------|---------------------|---------------------------------------------------|-------------------------------|-------------------------------------------------|-----------------------------------|---------------------------------------------|-------------------------------|
| E Auva'a        | Appointed Jun 2010  | 8                                                 | 8                             | 22                                              | 15                                | 15                                          | 9                             |
| A Bell          | Appointed Jun 2011  | 8                                                 | 6                             | 18                                              | 18                                | 13                                          | 9                             |
| M Brickell      | Appointed Jun 2010  | 8                                                 | 7                             | 23                                              | 20                                | 15                                          | 12                            |
| M Broadbelt     | Appointed Sept 2012 | 4                                                 | 3                             | 5                                               | 4                                 | 6                                           | 6                             |
| P Clark         | Appointed Oct 2012  | 3                                                 | 3                             | 3                                               | 3                                 | 3                                           | 2                             |
| A Hartley       | Retired Aug 2012    | 4                                                 | 4                             | 8                                               | 6                                 | 9                                           | 4                             |
| P Kearns        | Retired April 2013  | 8                                                 | 7                             | 13                                              | 9                                 | 15                                          | 8                             |
| K Kohere-Soutar | Retired Aug 2012    | 4                                                 | 4                             | 4                                               | 4                                 | 9                                           | 3                             |
| B Leveloff      | Appointed Dec 2009  | 8                                                 | 7                             | 22                                              | 20                                | 15                                          | 10                            |
| L Lim           | Appointed Jun 2010  | 8                                                 | 8                             | 20                                              | 17                                | 15                                          | 12                            |
| B Lythe         | Retired Aug 2012    | 4                                                 | 4                             | 10                                              | 10                                | 9                                           | 9                             |
| I McDougall     | Appointed Jun 2010  | 8                                                 | 8                             | 14                                              | 14                                | 13                                          | 12                            |
| T Millar        | Appointed Jun 2011  | 8                                                 | 8                             | 14                                              | 14                                | 13                                          | 13                            |
| M Milne         | Appointed Jun 2010  | 8                                                 | 8                             | 18                                              | 14                                | 13                                          | 10                            |
| B Plunkett      | Appointed Jun 2011  | 8                                                 | 7                             | 9                                               | 8                                 | 13                                          | 11                            |
| J Slater        | Appointed Sept 2012 | 4                                                 | 4                             | 9                                               | 9                                 | 6                                           | 6                             |
| K Whitney       | Appointed Oct 2009  | 8                                                 | 8                             | 30                                              | 30                                | 15                                          | 14                            |
| K Wright        | Appointed Sept 2012 | 4                                                 | 4                             | 6                                               | 6                                 | 6                                           | 6                             |
| <b>TOTAL</b>    |                     | <b>115</b>                                        | <b>108</b>                    | <b>248</b>                                      | <b>221</b>                        | <b>203</b>                                  | <b>156</b>                    |

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[www.ASBCommunityTrust.org.nz](http://www.ASBCommunityTrust.org.nz)



GRANTS AWARDED IN THIS SECTOR

\$1,132,802

# OF GRANTS

34

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



## Learning

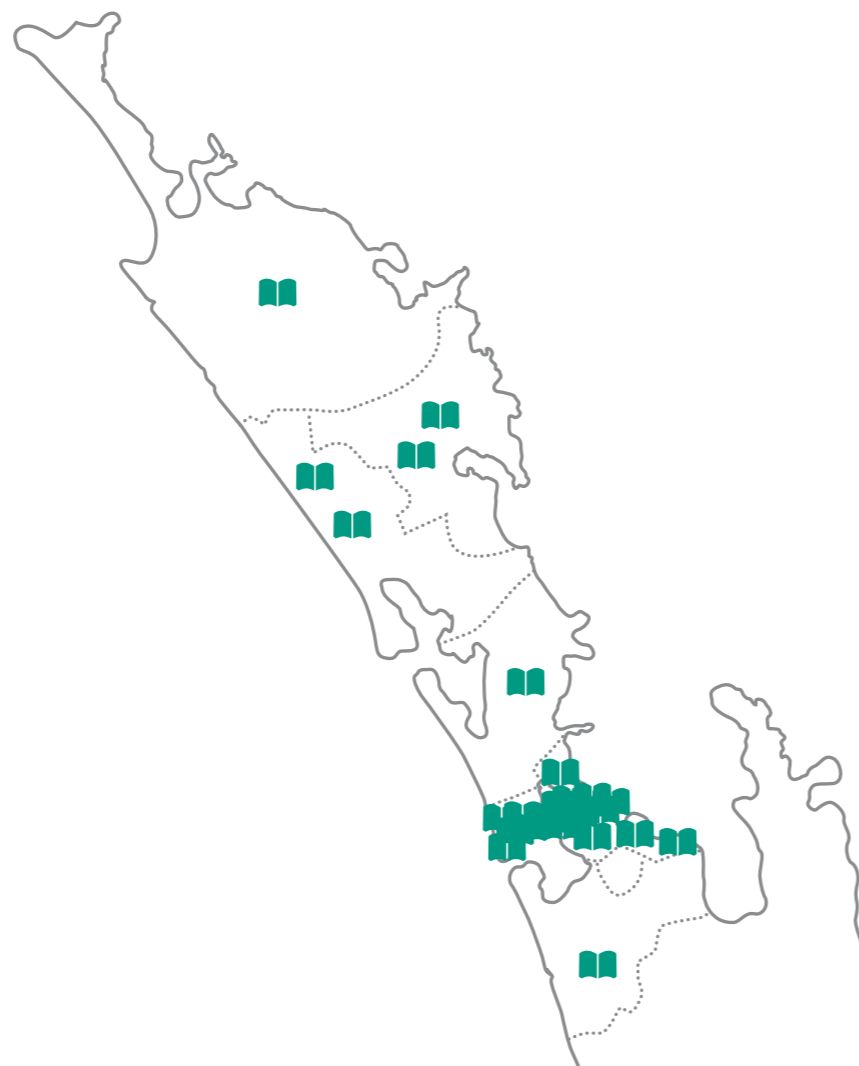


*We support projects that improve educational outcomes by adding value to the sector, with a focus on innovative projects and lifelong learning.*

Click to close



### DENSITY OF GRANTS BY REGION



REGIONAL GRANTS



transport's road  
Service, and St John

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educational outcomes  
safety by changing  
l attitudes. The  
e also has lifelong  
participants and their

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GRANTS AWARDED IN THIS SECTOR

\$1,993,111

# OF GRANTS

14

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



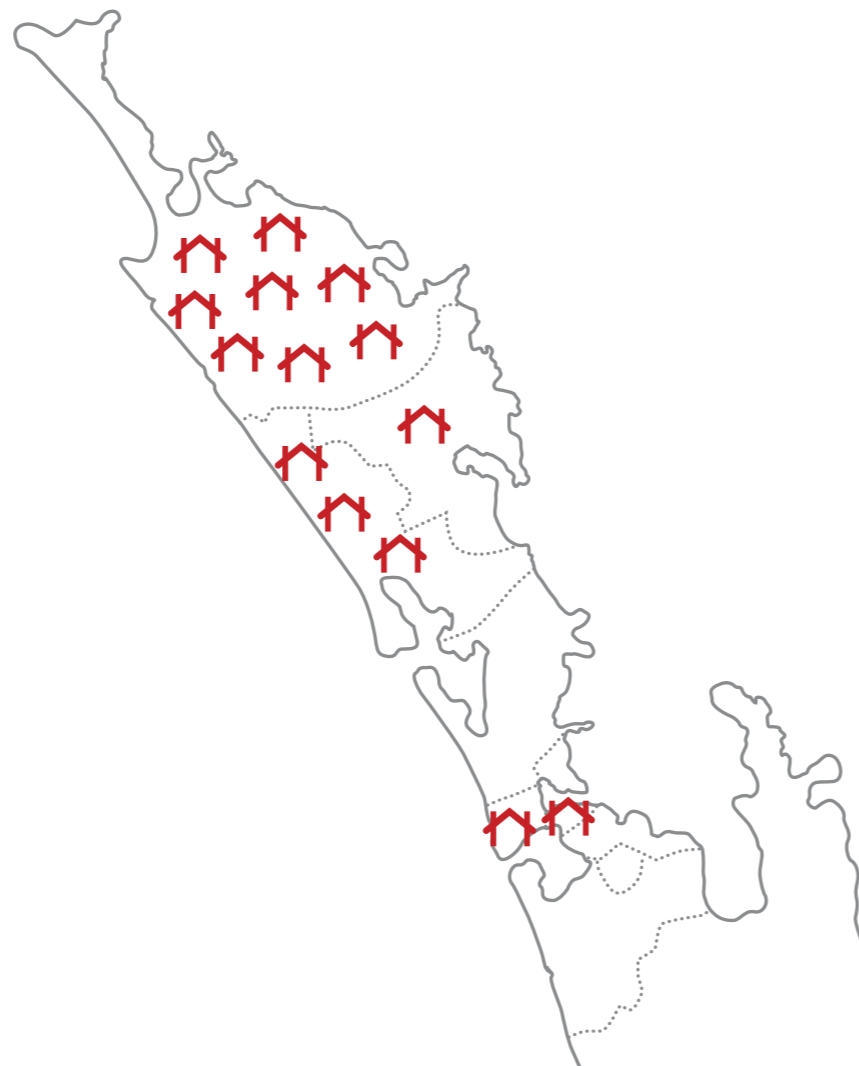
Marae



Click to close



### DENSITY OF GRANTS BY REGION



*We recognise the special role of the Marae to the communities in our region and we will consider funding towards building upgrades and extensions.*

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GRANTS AWARDED IN THIS SECTOR

\$3,558,682

# OF GRANTS

133

% OF THIS YEAR'S TOTAL GRANTS

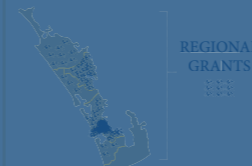


SECTOR GRANT VALUES



2011 / 2012 / 2013

DENSITY OF GRANTS BY REGION



# Recreation & Sport

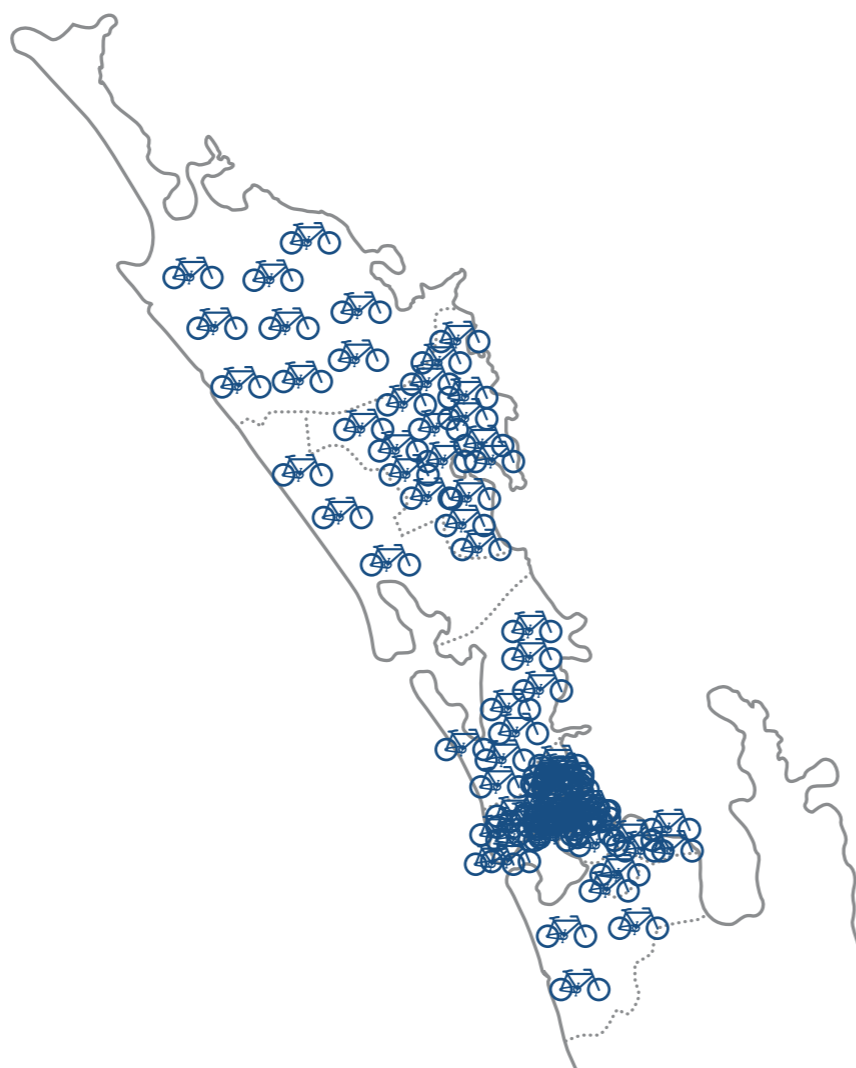


*We support organisations that focus on community participation and engagement in recreation. Targeted support will be provided for those organisations that aim to increase participation by younger and older people.*

Click to close



## DENSITY OF GRANTS BY REGION



### REGIONAL GRANTS



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GRANTS AWARDED IN THIS SECTOR

\$818,956

# OF GRANTS

3

% OF THIS YEAR'S TOTAL GRANTS



SECTOR GRANT VALUES



DENSITY OF GRANTS BY REGION



## Rescue Services

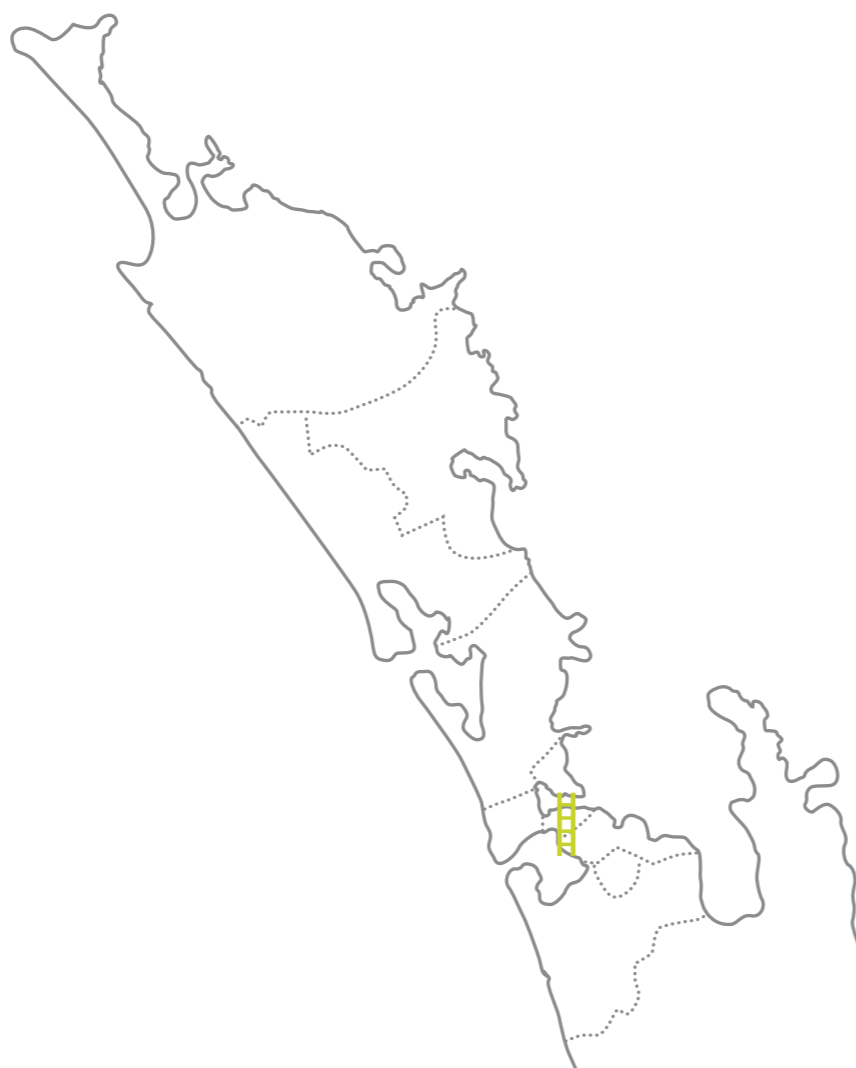


*We acknowledge the important and necessary role of rescue services in our region. We will provide strategic support at a regional level.*

Click to close



### DENSITY OF GRANTS BY REGION



REGIONAL GRANTS



...sh the pendants also  
...an remain with the  
...g the continuity of  
...lient if they wander.”

...endant gives  
...ind knowing that  
...s missing, they can  
...y normal search

...een shown to save  
...ces, as it ensures  
...e found quickly,  
...k of harm occurring



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# Community Housing



The capacity development support offered was underpinned by a deep understanding of the values of the sector and the housing providers. The 2010 recipients were offered training and workshops focused on supporting them to think more evaluatively. The 2011 recipients had more intensive capacity development support.

The principal focus was for the Trust to play a role in resolving entrenched social housing issues. Other benefits have been improved collaboration and capacity within the social housing sector, providers leveraging significant funding from other funding sources and organisations having the ability to trial and develop preventative ways of working with their clients.

The housing providers are demonstrating early success at achieving a range of their desired outcomes with the people they work with. These outcomes include:

- provision of housing for homeless families and individuals
- preventing families becoming homeless through losing their homes
- preventing families and individuals from spiralling down into highly vulnerable states
- supporting vulnerable people to stay in their homes
- supporting young people to learn skills of independent living in order to prevent longer term vulnerability
- supporting people experiencing homelessness into long term sustainable housing



- trialling new approaches to housing vulnerable elderly women.

All housing providers have been able to support and house people who are homeless or at risk of becoming homeless. Although demand has increased for most providers they have, for the most part, been able to keep up with demand and in some cases providers have been able to reduce their waiting lists and support more families than ever before.

Another early sign of success is that several of the providers have been able to leverage the CHP funding to develop and successfully tender for other funding opportunities. One-third (\$10.68 million) of the money given in the 2011/2012 round

of the government's Social Housing Fund was awarded to organisations that are also funded by the CHP fund.

The strategic intent of the CHP fund has clearly been met. The long-term funding commitment by the Trust has successfully helped these providers develop and implement innovative programmes they otherwise could not have implemented, to assist many people to move out of housing crisis or vulnerability. However, there is a strong message from the housing providers that there is still a considerable and growing need out there.



*He Korowai Trust works with whānau to stop pending mortgage sales and help them learn how to better manage their finances.*

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## Emerging Artists



*The pilot project trialled different models of mentoring and internship.*

### HELPING EMERGING ARTISTS BUILD ENDURING CAREERS

When research showed that there was a gap in funding for emerging artists in the Auckland and Northland regions, the Trust launched a pilot project to find out how to make a difference.

A review by the Trust showed that having ‘emerged’ with an educational qualification, or some initial training and experience in the arts, it was difficult for artists and practitioners to establish a professional career.

Consultation with regional, national and international arts professionals followed, helping inform the Trust about how to address this gap. As a result, an emerging artist pilot project was developed and launched in late 2010.

The pilot project aimed to trial different models of mentoring and internship programmes that supported emerging

artists and find out what factors helped make programmes successful. The Trust worked with leading Auckland arts organisations that already had a strong track record of working with emerging artists and the outcomes were then evaluated.

Three programmes were funded in partnership with Artists Alliance—visual arts, The Depot—community arts, and Silo Theatre (in partnership with New Zealand Opera, Auckland Theatre Company and Basement Theatre)—performing arts. Programmes included paid internships, mentoring and small grants funding.



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The pilot was evaluated over an 18-month period and the results showed outstanding employment rates, with 94.7% of emerging artists who completed internships securing ongoing employment. The paid internships fast-tracked skills, knowledge development and confidence, while all the interns increased their professional networks and increased their understanding of the “bigger picture” of the professional art world.

Internships worked well partly because the interns were paid. This ensured the commitment of the interns, and also meant that the providers felt a responsibility to the interns to provide a “real” work experience.

The evaluation also showed that mentoring was a key component. Mentors and mentees needed to be well matched and have a formal mentoring agreement. It was also clear from analysing the pilot results that they could not have been well funded from within the organisations’ existing operating budgets.

The Trust is now using the evaluation results to help guide the development of its high engagement model. However, it also wants to share those results with others looking to support emerging artists in their regions. To encourage this, a new publication, *Supporting Emerging Artists: A Practical Guide*, is now on our website and free to download.



The guide presents results and advice to other funders and arts organisations, based on what was learned from the pilot programme. The three pilot programmes are presented as case studies, followed by some practical tips on how to set up internship and mentoring programmes. There is also advice for funders considering how best to support emerging artists in their regions.

*Evaluation showed that mentoring was a key component in the project’s success.*

More on Artists Alliance:



More on The Depot:



## Emerging Artists



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## INDEPENDENT AUDITOR'S REPORT ON THE SUMMARY FINANCIAL STATEMENTS

### TO THE TRUSTEES OF ASB COMMUNITY TRUST

The accompanying summary financial statements on pages 44 to 49, which comprise the summary statements of financial position as at 31 March 2013, the summary statements of comprehensive income, changes in funds and cash flows for the year then ended and notes, for both the Trust and the Group, are derived from the audited financial statements of ASB Community Trust ("the Trust") and the Group, comprising the Trust and its subsidiaries, for the year ended 31 March 2013. We expressed an unmodified audit opinion on those financial statements in our report dated 18 June 2013.

The summary financial statements do not contain all the disclosures required for full financial statements under generally accepted accounting practice in New Zealand. Reading the summary financial statements therefore, is not a substitute for reading the audited financial statements of ASB Community Trust and the Group.

### TRUSTEES' RESPONSIBILITY FOR THE TRUST AND GROUP FINANCIAL STATEMENTS

The Trustees are responsible for the preparation of a summary of the audited financial statements, in accordance with FRS-43 Summary Financial Statements.

### AUDITOR'S RESPONSIBILITY

Our responsibility is to express an opinion on the summary Trust and Group financial statements based on our procedures, which were conducted in accordance with International Standards on Auditing (New Zealand) (ISA (NZ)) 810 Engagements to Report on Summary Financial Statements.

Our firm has also provided other services to the Trust and Group in relation to taxation services. Partners and employees of our firm may also deal with the Trust and Group on normal terms within the ordinary course of trading activities of the business of the Trust and Group. These matters have not impaired our independence as auditor of the Trust and Group. The firm has no other relationship with, or interest in, the Trust or Group.

### OPINION

In our opinion, the summary financial statements, derived from the audited financial statements of ASB Community Trust and the consolidated financial statements of the Group for the year ended 31 March 2013, are a fair summary of those financial statements, in accordance with FRS-43 Summary Financial Statements.

18 June 2013  
Auckland

# Auditor's Report



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## NOTES:

1. The information set out in these Summary Financial Statements has been prepared in compliance with FRS 43: Summary Financial Statements, and extracted from the Annual Financial Statements of the ASB Community Trust dated 10 June 2013. The Trust is a Public Benefit Entity which was formed on 30 May 1988 through the creation of a Trust Deed in compliance with the Trustee Banks Restructuring Act 1988. The Annual Financial Statements for the Group dated 10 June 2013 have been prepared in accordance with the New Zealand Equivalents to International Financial Reporting Standards (NZ IFRS) as appropriate for Public Benefit Entities.

that control ceases. The Group financial statements have been prepared using uniform accounting policies for like transactions. Intra-group balances and income and expenses arising from intra-group transactions are eliminated in preparing Group financial statements. The Trust subsidiary company, ASB Trusts Amateur Public Sports Promotion Limited has not operated since incorporation. ASB Community Trust Charitable Purposes Limited commenced operating during the 2009/10 financial year. ASB Community Trust Charitable Purposes Limited is a charity registered under the Charities Act 2005 (Registration # CC38999) with the Charities Commission.
2. Because of their summary nature, these Summary Financial Statements cannot provide a full understanding of the financial performance, financial position and cash flows of the Group. This understanding can only be obtained by reference to the Annual Financial Statements of the Group. A copy of the Annual Financial Statements may be obtained on request from the Trust's office (telephone 09 360 0291, mail PO Box 68 048 Newton Auckland) or downloaded from the Trust's website, [www.ASBCommunityTrust.org.nz](http://www.ASBCommunityTrust.org.nz)
3. Subsidiaries are entities controlled by the Trust. The financial statements of the subsidiaries are included in the Group financial statements from the date control commences until the date
4. Committed Grants are recognised as an expense and Grants Written Back and Grant Refunds Received are recognised as income in the Statement of Comprehensive Income. Grants to Community Organisations are classified in the Statement of Cash Flows as cash outflows from operating activities.
5. These financial statements are prepared in New Zealand Dollars which is the presentation and functional currency.
6. The Annual Financial Statements of the Group have been audited by KPMG, who has issued an unqualified audit opinion in respect of them. KPMG has audited these Summary Financial Statements and found them to be consistent with the Annual Financial Statements.

7. The Trustees authorised the publication of the Group's Summary Financial Statements on 10 June 2013.

Approved on behalf of the Board:



Chair  
10 June 2013



Audit, Finance and Risk Committee Chair  
10 June 2013

## 2013 Summary Financial Statements



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