

Wellington Community Trust Annual Review 2016/2017

Active people, resilient communities
and sustainable environments





2016/17 has been a year of change and growth at Wellington Community Trust.

In February we said farewell to our CE of 4 years, Mark Cassidy; we thank him for everything he contributed to Wellington Community Trust. We will welcome our

new CE, Georgie Ferrari, in August. Georgie has a strong community background and is returning to Wellington from Melbourne where she served as the Chief Executive Officer for the Youth Affairs Council of Victoria.

This year we also reviewed our vision and granting framework; a summary of this is available on page 4. We are very pleased with the positive feedback we have received on our more focussed approach and streamlined processes.

We are also pleased to report good investment returns and an increase in grant making. Our investment returns in the 2016/17 year was 9.8% (gross) and total grants given increased from \$1,443,367 last year to \$1,66,740 in the 2016 /17 year.

It is a privilege to have spent my first year as chair of Wellington Community Trust. My heartfelt thanks to our hard-working trustees and staff who make all our good work possible, and a special thanks to outgoing trustee Ross Graham for his many contributions and dedication.

I also want to acknowledge the help and support we have received from Bev Gatenby, Kate Frykberg and Jenny Gill. At various times this year they have each contributed to the development of WCT. Those who are part of the philanthropic sector will know the formidable reputation for excellence and achievement that these three women have. We are honoured to have had their input to our business.

Finally, my very best wishes to Wellington Community Trust grantees and the many diverse communities of the Wellington region. We look forward to continuing our journey with you in the coming year.

Gerardine Clifford-Lidstone
Chair

Financial Information

Our financial performance	2017	2016
During the year we received income from:		
Investments	5,578,188	2,834,658
Other Income	176,837	220,236
	5,755,025	3,054,894
We used this income for:		
Administration	-595,396	-466,473
Investment Management	-365,582	-374,178
Donations paid	-1,667,740	-1,443,367
Donations committed	-360,000	0
Leaving a balance to be added to Trust Capital	2,766,307	770,876

Our financial position	2017	2016
We began the year with:		
Total Equity	62,630,138	61,859,262
added the surplus for the year	2,766,307	770,876
finished with total equity of	65,396,445	62,630,138
This amount is represented by:		
Current Assets	4,500,294	5,025,664
New Zealand Fixed Interest	5,661,462	5,810,601
International Fixed Interest	14,010,769	13,759,717
International Shares	24,081,989	19,696,231
Trans Tasman Shares	7,799,707	8,195,003
Global Property	4,551,224	4,843,114
Infrastructure Fund	5,084,658	5,007,123
Karori Sanctuary Trust	99,880	333,334
Property, plant, equipment and intangibles	26,769	12,429
Database Project – Loan Advance	5,000	10,000
	65,821,751	62,693,216
Less Current Liabilities	-65,306	-63,078
Less Non-current Liabilities	-360,000	0
	65,396,445	62,630,138

Please see our website for more information and a copy of the full financial statements for 2016/2017.

In late 2016, Wellington Community Trust trustees agreed on a new strategy to guide 2017/18 funding. This is summarised below.

Vision:

Active people, resilient communities and sustainable environments

Key target groups:

- Children 0 - 5
- Young people 4 - 14
- Youth at risk 15 - 24
- Isolated elderly
- Māori
- Pacific
- High deprivation communities

Grant programme:

Community Awards

Partnership with local government authorities and Wellington Airport held annually

Quick Response Grants

Grants up to \$5,000
5 application rounds each year

Community Grants

Grants between \$6,000 - \$100,000
3 application rounds each year

Multi-year Targeted Grants

Funding over 5 years for a small group of organisations aligned to key priority areas

People

Developing our people



Participation

Engaging in our community



Places

Protecting our environment



Arts & Culture	
African Communities Council of Wellington	2,500
Arcade NZ Live Art Trust	5,000
Asia NZ Foundation	2,500
Asian Events Trust	8,000
Barbershop Harmony NZ	3,000
BATS Holdings Ltd	5,000
Brass Bands Association of NZ	3,000
Chamber Music NZ Trust	5,000
Choirs Aotearoa NZ Trust	8,000
Creative Capital Arts Trust	40,000
Everybody Cool Lives Here Trust	2,000
Expressions Arts & Entertainment Trust	6,000
Footnote Dance Trust Board	15,000
Indian Ink Trust	5,000
LUX Light Festival	5,000
Mujeres in Aotearoa Inc.	1,420
Multicultural Council of Wellington	5,000
New Zealand Choral Federation – Wellington Region	5,000
New Zealand Deaf Film Inc.	5,000
New Zealand Festival	200,000
New Zealand Film Festival Trust	10,000
New Zealand Portrait Gallery	8,000
New Zealand Symphony Orchestra	20,000
Newtown Residents' Association	8,000
NZ National Myanmar Ethnic Council Inc.	5,000
Orchestra Wellington	20,000
Paekakariki Station Precinct Trust	2,500
Porirua Community Arts Council	10,000
Royal New Zealand Ballet	20,000
Shakespeare Globe Centre NZ	5,000
Show Me Shorts Film Festival Trust	5,000
Songleaders Network Aotearoa	2,504
SOUNZ Centre for NZ Music	5,000
Sri Lankan Dance Academy	2,500
Storylines Children's Literature Charitable Trust	5,000
Summer Shakespeare Trust	2,500
Supertonic Inc.	2,000
Taki Rua Productions Society	6,000
Te Kura Toi Whakaari: NZ Drama School	5,000
Te Rakau Hua O Te Wao Tapu Trust	10,000
The Community Performing Arts Trust	5,000
The Documentary NZ Trust	5,000
The Orpheus Choir of Wellington	5,000

Upper Hutt City of Song Charitable Trust	2,500
Wellington District Brass Band Association	3,000
Wellington Independent Arts Trust	15,000
Wellington Jazz & Music Festival Trust	5,000
Wellington Malayalee Association Inc.	2,500
Wellington Museums Trust	15,000
Wellington Sculpture Trust	20,000
Wellington Treasure Trust	5,000
Young & Hungry Arts Trust	5,000
Youthdance Education Trust	3,050

Community Wellbeing	
Age Concern Wellington Inc.	5,000
Arts Access Aotearoa Whakahaau Katoo o Hanga	8,000
Big Buddy Mentoring Trust	10,000
Birthright Kapiti Inc.	5,000
Birthright Wellington Inc.	6,000
Cannons Creek Youth Charitable Trust	10,000
Challenge 2000	15,000
Changemakers Refugee Forum Inc	10,000
Community Law Wellington & Hutt Valley	10,000
Connect Media Charitable Trust	8,000
Dress for Success – Wellington	3,100
Drug-ARM Wellington Inc.	15,000
Eastern Southern Youth Trust	10,000
English Language Partners Hutt	2,000
English Language Partners Porirua	5,000
Father & Child Trust	3,000
Graeme Dingle Foundation	10,000
Grandparents Raising Grandchildren Trust NZ	8,000
Healthy Future Families Trust	5,082
Hui E! Community Aotearoa	5,000
Ignite Consultants Wellington	1,000
Inclusive NZ, Inc.	7,209
Kaibosh Food Rescue	15,000
Kapiti Women's Health Collective Inc.	6,628
Kids Camps NZ Wellington	5,000
Kidz Need Dadz Wellington	7,800
Life Flight Trust	25,000
Literacy Aotearoa Porirua	4,800
Literacy Aotearoa Wellington Inc.	10,000
Moera Community House Inc.	5,000
Multicultural Learning & Support Services Inc.	10,000
Naenae Youth Charitable Trust	15,000

NZ Centre for Gifted Education Ltd	5,000
NZ Federation of Family Budgeting Services	10,000
NZ Council of Christian Social Services	637
NZ Council of Victim Support Groups	5,000
NZ Howard League for Penal Reform Inc.	10,000
NZME Special Children's Christmas Party	4,000
Orongomai Marae	4,800
Parent to Parent Wellington Region	5,000
Parents Centres NZ Inc.	6,000
Pomegranate Kitchen	5,000
Porirua Living Without Violence	6,000
Porirua Whanau Centre Trust	10,000
Pregnancy Help Inc. Greater Wellington Branch	10,000
SADD Aotearoa	9,500
Samaritans of Wellington	10,000
Sexual Abuse Prevention Network	10,000
Shakti Ethnic Womens Support Group (WGN) Incorporated	10,000
Skylight Trust	5,000
Stage Challenge Foundation	5,000
Te Ara Korowai	4,700
The Centre for Science & Citizenship Trust	5,000
The Common Unity Project	15,000
The House of Grace Trust Inc.	10,000
The Parenting Place	10,000
Thumbs Up Trust	10,000
Tu Kotahi Māori Asthma Trust	10,000
Upper Hutt Community Rescue Inc.	5,000
Upper Hutt Community Youth Trust	10,000
Vincent's Art Workshop	5,000
Virtuoso Strings Charitable Trust	10,000
Wellington Night Shelter	10,000
Wellington Rape Crisis	10,000
Wellington Somali Council	5,000
Wellington Volunteer Centre	10,000
Whare Manaaki Inc.	10,000
Youth Quest Trust Kapiti	10,000
Youthline Wellington Inc.	10,000

Heritage & Environment	
Asert-Tatou Development Trust	5,000
Atafu Tokelau Community Group	10,000
Conservation Volunteers NZ	15,000
EERST	5,000
Friends of Mawaihakona Stream	7,500
Kapiti US Marines Trust	5,000

Lilburn Residence Trust	1,400
Onslow Historical Society	2,910
Pipitea Marae Charitable Trust	30,000
Sustainable Coastlines Charitable Trust	10,000
Wahine 50 Charitable Trust	8,000
Wellington Marine Conservation Trust	15,000
Wellington Natural Heritage Trust	1,665
Wellington Vintage Machinery Inc.	8,000
Wellington Zoo Trust	15,000

Sports & Recreation	
Athletics NZ	5,100
Bikes Welcome Charitable Trust	200
Capital Zone Basketball Trust	8,000
College Sport Wellington Inc.	20,000
Cricket Wellington	6,500
Fraser Park Sportsville Inc.	5,000
Get Kids Active Charitable Trust	5,000
Hutt Valley Softball Association	1,000
Ignite Sport Trust	10,000
Lions Club of Kapiti	3,000
Makara Peak Mountain Bike Park Supporters Inc.	15,000
Netball Wellington Centre Inc.	8,000
New Zealand Federation of Multicultural Councils Inc.	5,000
Otaki Promotions Group Inc.	5,000
Porirua Grand Traverse Trust	5,000
Royal Port Nicholson Yacht Club	10,000
Sailability Wellington Trust Inc.	5,000
Scouts NZ	8,000
Sir Edmund Hillary Outdoor Pursuits Centre	5,000
Sport Wellington	65,000
Swimming New Zealand Inc.	15,000
Te Araroa Wellington Trust	6,370
Wellington Basketball Association	500
Wellington Circus Trust	10,000
Wellington Hockey Association	8,000
Wellington Rugby Football Union	8,000

Multi-year	
Women of Worth (WoW)	40,000
Wesley Community Action	40,000
Sustainability Trust	40,000

Contact

Wellington Community Trust

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Our Trustees

Gerardine Clifford-Lidstone (Chair),
Jan Dowland, Dawn Sanders QSM, ONZM,
Liz Kelly, Nick Thomas, Norrey Simmons,
Clare Needham, Ross Graham, Barry Lindsay

Our Staff

Mark Cassidy (Chief Executive until
February 2017), Kate Hiatt, Community
Engagement & Funding Manager,
Marysia Collins, Communications
Coordinator & Funding Support
Accountants: Kendons

