



OTAGO
Community Trust



CHAIRPERSON'S AND CHIEF EXECUTIVE'S REPORT 2015



We are pleased to present the annual report of the Otago Community Trust for the year ended 31 March 2015.

The Trust has experienced a very positive year, with the Investment Portfolio returning 13.8% or \$30.95m. As a result, the total Trust Investment Portfolio at the end of the year rose to \$263.6m.

The Trust's investment goals are to return as much as possible to the Otago Community through donations, as well as preserving the real value of the initial capital of the Fund. This is achieved through careful investment activity, with the Trust making use of a reserving graphing tool to guide decisions around the level of donations it can provide to the community year-on-year. This ensures the real value of the original capital of the Trust is protected whilst endeavouring to maintain equity between different generations of beneficiaries.

Last year the Trust processed nearly 400 applications from donation applicants from all over Otago. The online application process we introduced this year saw 11% of applications come to us online, something that will continue to grow.

DONATIONS FOR 2014-2015

In the 12 months to 31 March 2015 Trustees approved donations totalling \$4.3m.

The Trust continued its commitment to three main priority areas during the year, being Warm Homes, the region's Cycle Ways and Youth Health and Wellbeing. These donations amounted to over \$500,000.

The Trust contributed \$400,000 to insulating low-income households in Otago through the Warm Up New Zealand: Healthy Homes programme. This brings the number of Otago homes insulated to around 1,000, directly impacting on the lives of several thousand residents. It is widely acknowledged that improving the energy efficiency of homes has a direct impact on health and wellbeing.

Once again the Trust was able to donate funding towards strengthening systems of service delivery in community wellbeing organisations. In 2014, 14 organisations received funding for IT upgrades, policy and resource development and staff training initiatives.

Other significant donations during 2014-2015 included \$290,000 towards the upgrade of the Sunnyvale Sports Centre, \$200,000 towards the purchase

of the Dunedin Night Shelter buildings, \$100,000 to the Otago Museum towards the development of its new Planetarium, and \$90,000 to help with pest eradication in Martins Bay on the West Coast. The Trust makes a significant contribution towards sport, donating over \$800,000 to regional sporting organisations in 2014-2015. The region's Social Service Agencies and Community Wellbeing Organisations collectively also received a significant donation of over \$450,000 to help fund the various programmes they provide to assist our communities.

THE COMING YEAR

Conscious of the need to safeguard the assets of the Trust, the donations budget for the 2015-16 year has been set at \$6.9m. This is an increase on recent years, and is a return to a level more in line with donations budgets pre the 2008 Global Financial Crisis. \$1.4m of this budget is being set aside to fund the Trust's priority areas which include Warm Homes, Cycle Ways and Youth Health and Wellbeing (focusing on employment, education and training).

The Trust continues to monitor with interest the impact that our funding makes within our communities.

TRUST COMPOSITION

Our Chair Lauren Semple stood down in May to concentrate on other activities; we are grateful that she has agreed to stay on as a Trustee as she brings a wealth of knowledge to the Trust Board. Ross McRobie has taken over the role of Chair, and Stephen Kornyei was appointed as Deputy Chair. The Trust Board comprises 11 Trustees who represent the various

areas of the Otago Region. We are appreciative of all our Trustees for their commitment, enthusiasm and hard work.

Trustees continue to be well supported by a small but dedicated team of staff who are always willing and able to assist community groups. We continue to strive to fulfil our mission to support, encourage and enhance Otago communities by responsibly managing and wisely sharing the resources which have been entrusted to us.

The Trust ends the 2015 year positively and we look forward to working with members of the community on a wide range of projects in the year to come.

Ross McRobie, Chairperson

Barbara Bridger, Chief Executive

Notice of Annual Public Meeting

The 27th Annual Public Meeting of the Otago Community Trust is to be held on Tuesday, 25 August 2015 at 4.30pm at the Barclay Theatre, Otago Museum, 419 Great King Street, Dunedin.

BUSINESS:

To report on the operations of the Trust for the financial year ending 31 March 2015 and on the financial statements for that year.

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ART AND CULTURE



What better way to showcase Central Otago’s art to out-of-town visitors than to have it in the cafes and hotels located near the Otago Rail Trail.

Thirty nine venues opened their doors to local artists during the inaugural Art on the Rail Trail exhibition from February to April 2015, and it’s now planned to become an annual event.

Organiser Maxine Williams said the artists, musicians and poets, the venue owners and the many thousands of cyclists and walkers using the track were all very enthusiastic about the initiative.

“The collaboration has been fantastic. It’s a new way to support local artists, many of who sold their art, and it’s given the venues another attraction and some fresh new art to look at.”

“We’re very grateful to the Otago Community Trust for its donation towards organising the event and printing brochures – we couldn’t have done it without that initial support.”

performers, producers, writers, audio engineers, managers and others involved in the music industry together to better understand how to manage music talent. Musicians aged from 10 to 68 from around New Zealand attended the event, which included a workshop from well-known New Zealand artist Dave Dobbyn.

Organiser Lynne Christie said the feedback was very enthusiastic, and it’s expected this will become an annual event. “Thanks so much to the Community Trust for being one of the first to put their hands up to help – it made it so much easier to attract further support.”

MAKING MUSIC IN WANAKA

Wanaka played host to the first music career workshop for the New Zealand music industry, thanks to support from the Otago Community Trust.

The Youth and Adult Music Industry (YAMI) summit in May bought



CELEBRATING WRITERS IN DUNEDIN



The Dunedin Writers and Readers Festival (DWRf) 2015 built on the success of the inaugural festival in 2014 and has secured its place on the Dunedin events calendar.

The event attracted international guests and much loved New Zealand writers as well as drawing on a wealth of literary talent from Dunedin, New Zealand’s UNESCO City of Literature.

Attendees were treated to nearly 40 events over six days, including many free events such as the DWRf literary lunch series. Sell-out and capacity events included the Story-time train to Port Chalmers library for kids, the Slam Poetry competition and the mass book launch “Chain Reaction” at the historic Athenaeum Library. Additional writers’ workshops for young adults and adults were slotted in to meet demand.

SHAKESPEARE IN DUNEDIN

The Otago Community Trust helped Dunedin host a residential course for Shakespearean secondary school students this year, something that was so successful it’s likely to return to the city again.

The students took part in the national annual University of Otago Sheilah Winn Shakespeare Festival at Queen’s Birthday weekend. Organised by the Shakespeare Globe Centre New Zealand, Festival participants attended talks and workshops to learn performance skills, then produced and costumed a Shakespeare play.

The festival in Dunedin also fitted in a mystery tour of the city, ending at Larnach’s Castle.

The Festival is open to the winners of 23 regional Shakespeare competitions, where secondary students perform a five minute student-directed and 15 minute adult or student-directed scene.

A group of 24 students who attended the Festival have since gone on to train with the Young Shakespeare Company at the Globe Theatre in London, to put on two public performances.



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For more stories visit www.oct.org.nz

DONATIONS
ART AND CULTURE

Ake Ake Theatre Company	4,000
Central Coast Country Music Assn Inc	500
Central Otago District Arts Trust	2,000
Central Otago Regional Choir	5,000
Central Otago Regional Orchestra	1,000
Chamber Music New Zealand Trust	4,000
Choirs Aotearoa NZ Trust	2,000
Dance & Physical Theatre Trust	1,600
Dance Aotearoa NZ Ltd	3,500
Dunedin Burns Club	1,500
Dunedin Choral Society	3,500
Dunedin City Council -	7,500
Puaka Matariki Celebrations	

Dunedin Civic Orchestra Inc -	55,000
t/a Southern Sinfonia	
Dunedin Fringe Arts Trust	35,000
Dunedin Harmony Chorus Inc	300
Dunedin Midwinter Celebrations Trust	7,000
Dunedin Opera Company t/a Opera Otago	10,000
Dunedin Performing Arts	4,000
Competitions Society Inc	
Dunedin Pride Organising Committee 2013	500
Dunedin Returned Services Choir	2,500
Dunedin Tap Dancing Society	2,000
Dunedin Youth Orchestra Inc	4,000
Fortune Theatre Trust	45,000
Friends of the Forrester Inc	7,500
Friends of the Globe Theatre Inc	85,000
Harbour Street Jazz - Oamaru	4,000
id Dunedin Fashion Inc Soc	30,000
Lake Wanaka SouNZ Inc	4,000

Metonymic Trust	800
Mosgiel Ballet Competitions Society	500
New Zealand Book Council	800
New Zealand Dance Advancement Trust	5,000
New Zealand Symphony	1,500
Orchestra Foundation	
NZ Chinese Assn of Otago & Southland Inc	500
NZ Mountain Film Festival Charitable Trust	5,000
Oamaru Tap Dancing Assn	750
Otago Secondary Schools	1,500
Music Festival Society Inc	
Otago Symphonic Band Inc	300
Outspoken Charitable Trust	5,000
Royal New Zealand Ballet	15,000
Shakespeare Globe Centre New Zealand	4,000
Short Film Otago	42,500
Show Me Shorts Film Festival Trust	700
Society of Women Musicians of Otago Inc	2,500

Southern Lakes Arts Festival Trust	45,000
Southern Youth Choir	1,000
Spring Chamber Music	1,000
Taieri Competitions Society	500
Taki Rua Productions Society Inc	3,000
The Dunedin Writers and	10,000
Readers Festival Trust	
The NZ International Early	2,500
Music Festival Trust	
The Otago Early Childhood & Schools	7,500
Maori & Pacific Island Festival Trust	
Waikouaiti Amateur Music	6,000
& Drama Society Inc	
Waitaki District Schools Pipeband	1,520
Waitaki Summer Music Camp	2,000
Waitaki Tourism Association	4,000
	502,270

KAPA HAKA TEAM LOOKING GOOD



The Alexandra School kapa haka group looked very smart at the Polyfest in Invercargill last year, thanks to some timely funding from the Otago Community Trust.

The Trust provided funding towards uniforms for the 40 senior students performing at the event.

Teacher Anne Batchelor said the group had formed in 2012, and performing at the large Polyfest for the first time was “huge” for the students, as was staying overnight on a marae in Bluff. “The uniforms made a difference to us, and we’re pleased that they’ll be there for students for many years to come.”



LEARNING ABOUT ROBOTICS

Robotic equipment is proving a popular new purchase for South Otago High School.

The Otago Community Trust helped to fund robotic lego sets for a lunchtime club at the school, designed for interested students to make and to programme robotic objects.

Co-ordinator Amanda Smith said it’s an enrichment opportunity with an engineering and programming component but it’s also lots of fun. “It’s opening new concepts for the school, and it’s been really exciting to see what the students have been able to make in the few weeks we’ve had the equipment. We’re really looking forward to taking it to a new level with learning about programming – the sky’s the limit.”

LEARNING VALUABLE LIFESKILLS

The support of the Otago Community Trust helped reduce barriers so people could attend a LifeSkills programme run by REAP-Central Otago, to learn new skills.

The Otago Community Trust helped to fund the 2015 Life Skills programmes held in Cromwell, Wanaka and Alexandra. These targeted second chance learners or people who needed help in running a home on a limited budget.

Programmes were offered on preserving summerfruit, cooking on a budget and basic sewing. The Otago Community Trust’s support meant the course could be offered at no cost and included childcare when required.

There were many successful outcomes to this programme, with heart-warming stories of learners gaining confidence, meeting new friends and developing a range of useful everyday skills.



LEARNING



WAREPA SCHOOL CELEBRATES NEW FACILITY

The Warepa School just south of Balclutha is so proud of its new outdoor court, its pupils wrote music and created a school dance specifically to celebrate its opening.

Established in 1858, Warepa School is one of the oldest schools in South Otago.

The Otago Community Trust donated funds towards the new AstroTurf court, which Warepa School Principal Sue Adcock said will be used for everything including netball, tennis, hockey, basketball, and football. As well, it will be a good wet day alternative for play, an outdoor extension to the classroom during fine weather, and the community will make full use of it outside school hours.

“We have a roll of 53, growing to 59 by the end of the year, so it was a huge effort for a small school to fundraise - the opening was a huge celebration. We appreciate the support of the Trust and the community”.



DONATIONS LEARNING

Abbotsford School	400	Grants Braes School	3,000	Otago Chamber of Commerce	40,000	South Otago High School	2,110
Alexandra Primary School	2,440	Green Island School	2,668	Otago Girls High School	4,200	St Bernadette’s School	6,500
Andersons Bay School	80	Hawea Flat School	1,000	Otago Life Education Trust	12,000	St Brigids School	160
Arthur Street School	340	Hawea Playgroup	2,500	Otago Medical Research Foundation	60,000	St Clair School	230
Balclutha Primary School	435	Heartland Otago/Southland	7,600	Otago Polytechnic - Dunedin School of Art	750	St Gerards School	754
Balmacewen Intermediate School	230	Life Education Trust		Otago Polytechnic - Pacific	7,500	St Josephs School	190
Bathgate Park School	2,410	Holy Family School	4,300	Island Scholarships		St Leonards School	1,420
Big Steps Educare	500	Kaikorai Valley College	2,770	Otago Polytechnic - Turning Point Bridge	26,250	St Marys School - Mosgiel	260
Bradford Primary School	1,280	Kakanui School	700	Otago University Medical Students Assn	1,000	St Marys School Kaikorai	175
Brockville School	1,200	Karitane School	600	Outram School	240	St Mary’s School Milton	2,100
Carisbrook School	4,905	Kavanagh College	1,675	Outward Bound	67,500	St Peter Chanel School	1,000
Clutha Valley Primary School	360	King’s High School	4,460	Papakaio School	505	Taieri College	4,895
Clyde Primary School	8,545	Logan Park High School	1,450	Peninsula Toy Library	5,000	Tainui School	50
Concord School	350	Macandrew Bay School	1,580	Pine Hill School	1,075	Te Runanga O Otakou	500
Cromwell Primary School	1,665	Maori Hill School	120	Portobello School	200	The Parenting Place - Attitude Division	5,384
Dunstan High School	2,005	Mornington School	400	Queens High School	10,510	The Terrace School	1,640
East Otago High School	1,360	Mt Aspiring College	1,500	REAP - Central Otago	6,000	Waitaki Boys High School	210
Elmgrove School	680	Musselburgh School	1,150	Reid Park Kindergarten	5,000	Waitati School	360
Fairfield School	20,860	North Otago Primary Principals Assn	4,000	Rosebank Kindergarten	300	Wakari School	210
Flag Swamp School	470	Oamaru Intermediate School	1,805	Rosebank Primary School	1,100	Wanaka Preschool Early Childhood Centre	1,000
Grants Braes Kindergarten	600	Omakau School	10,120	Roslyn Kindergarten	750	Wanaka Primary School	7,300
		Opoho Primary School	2,200	Roslyn Maori Hill Playcentre	6,807	Warepa School	7,000
		Otago Boys High School	17,800	Sacred Heart School	750	Weston School	680
		Otago Careers Festival	30,000	Sawyers Bay School	440		451,178
		(Mayors Taskforce for Jobs)		Silverstream School	660		



The Otago Community Trust is pleased to be a long-time supporter of Kids Camp New Zealand.

The Trust provided \$5000 towards the camp, which gives 30 marginalised children from Dunedin a week of fun-filled activities at Camp Columba at Pukerau in Southland.

Kids Camp spokesman Paul Barham said the focus is very much on the child, with one-to-one support from a caregiver.

“We have a bunch of activities that are fun and challenging, often exposing the kids to new things and taking them out of their comfort zone, like abseiling. It gives a great sense of achievement and hope.”

“It’s a week off from reality, and the emphasis is on treating the children as special and giving positive examples of working with others. We’re grateful for the funding support to help organise it and provide transport.”



TRAINING SEARCH AND RESCUE VOLUNTEERS

Preparation is a crucial aspect of search and rescue, which is why the Otago Community Trust donated money to Marine Search and Rescue (MSAR) for volunteer training.

Dunedin Marine Search and Rescue is a not-for-profit organisation made up of highly skilled volunteers from many groups including surf lifesaving. It assists the New Zealand Police in Dunedin with search and rescue operations on the water - covering a huge area of local coastline, harbour and inland waterways.

The group includes a specialist water rescue squad of 10 who are trained for rescue from a helicopter.

Regular training is a prerequisite for Search and Rescue, and MSAR welcomes the funding of the Otago Community Trust to assist in training and skills development.



STRAIGHT UP TRUST

The key to the programmes being offered by the Straight Up Trust are focusing on the strengths of the young people they work with.

The Trust has youth development programmes in South Dunedin that help with leadership and life skills in young people. It runs several youth clubs and also has youth workers managing programmes in Dunedin schools that help children to build social and emotional resilience.

The Otago Community Trust provides funds towards community programmes.

“Everything we do is strength-based, so that each young person has the opportunity to understand what they’re good at, not just what they get wrong,” organiser Kristin Jack said. “Over the 12 years we’ve been running we’ve had positive feedback from teachers, caregivers and adults who’ve attended a youth group as a young person, that this empowers and is making a difference in the community.”

DUNEDIN YOUTH ON-AIR

The Youth Zone programme is giving Dunedin young people the opportunity to produce radio shows.

Otago Access Radio (OAR) is hosting the Youth Zone programmes, made for and about young people. So far 43 people have hosted programmes across five hours of radio time a week, and they’ve interviewed 162 guests. Programmes include Global Kids, where young people



interview youth from different cultures, and a musicology slot.

OAR Manager Lesley Paris said it’s worked exceptionally well. “We’re providing opportunities for young people to develop a range of skills, including interviewing, and the programmes they produce are what young people are interested in. We’re thrilled that the kids are choosing to be involved more with the radio station and volunteering in other areas. We’re very grateful to have the Community Trust’s support to make this happen.”

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DONATIONS COMMUNITY ACTIVITY			
Acts of Kindness Charitable Trust	1,500	Clutha District Council - Aspiring Leaders	1,583
Alexandra and Districts Youth Trust	3,000	Cromwell Youth Worker Trust	2,500
Alexandra Blossom Festival Inc	3,000	Deacons Court of Knox Church	3,500
Alexandra Toy Library	1,400	Dunedin City Baptist Church	40,000
Berwick Pool Trust	800	Dunedin City Council - Anzac Day	2,884
Catlins Search & Rescue	13,000	Dunedin City Council -	1,000
Catlins Senior Citizens Club Inc	4,000	Dunedin Public Library	
Cavalcade Host Town Comm Inc	3,000	Dunedin City Council - New Year	2,500
Central Otago District Council	6,400	Dunedin Curtain Bank	1,500
Church of St Columba	8,500	Dunedin Marine Search & Rescue Inc	4,000
		Dunedin North Community	1,000
		Patrol Charitable Trust	
		Dunedin Poultry, Pigeon & Cage Bird Club	400
		Dunedin Santa Parade Trust	15,000
		Dunedin Senior Chinese Assn	1,500
		Equippers Church Dunedin	4,000
		Flagstaff Community Church	1,000
		Grey Power - Otago Inc	500
		Hills Radio Trust	6,000
		Historic Clyde Incorporated	2,500
		Japanese Culture and Language Group	750
		Jennys Companionship Group Inc	3,500
		Kahu Youth Trust	4,000
		Kaikorai Grays Sport & Travel Inc	2,000
		Kati Huirapa Runanga ki Puketeraki	2,000
		Keep Dunedin Beautiful Committee	2,000
		Kids Camps NZ	5,000
		Oamaru Combined Churches - Outreach	2,000
		Oamaru Wine & Food Festival Inc	3,000
		Otago Malaysian Students' Association (OMSA)	500
		Otago Presbyterian Campsite Committee	15,000
		Our Hut Tahakopa Committee	2,300
		Owaka Swimming Baths Committee Inc	2,600
		Queenstown Lakes District Council - Summerdaze Festival	5,000
		Roxburgh Entertainment Centre	18,000
		Improvements & Promotions Inc	
		Saddle Hill Foundation Trust	7,500
		Scout Assn - St Patricks Scout Troop	1,000
		Straight Up Trust	10,000
		Strath Taieri Community Centre Society Inc	4,000
		Taieri Christian Care Trust	2,000
		Teviot Valley Community Christian Trust	2,500
		Waitati-e!	1,000
		Wingatui Community Hall Society	2,500
			234,117



DUNEDIN'S CHATBUS - MAKING A DIFFERENCE

Dunedin's ChatBus is making a difference in the lives of the city's young people.

Now in its eighth year, the free mobile counselling service for children under 14 regularly visits 16 primary and intermediate schools to offer a friendly ear to children who need someone impartial to talk to. Organiser Averil Pierce started the service to help reduce New Zealand's alarming suicide rate and instances of child abuse, working on the premise that early intervention achieves the best results.

It now has three buses, with the Otago Community Trust helping to fund the latest vehicle refit.

The counsellor in each bus talks issues through with individual children, and

refers or seeks assistance if necessary. "What we're doing is helping each young person to deal with their burden, whatever it may be, so they are more resilient and equipped to cope the next time they encounter anything that challenges them."

"It's also important to empower and celebrate what is going well – success breeds resilience."

They have talked to many hundreds of youngsters since starting, discussing problems big and small, everything from friendship dilemmas, to abuse at home and trauma.

LOOKING FOR WORK? TRY THE CLUTHA DISTRICT

The Clutha district has been running a scheme to help match the employment needs of the area with youth in Dunedin who are looking for work.

The Clutha District Council Work Scheme was originally set up five years ago to assist young people to fill job vacancies in the area, developing a system of getting employers and people looking for work in the same room.

Mayor Brian Cadogan said it's proved very successful in reducing the unemployment rate in the Balclutha area, and meeting the needs of their

youth. "It would be fair to say it's been transformational - it has economic benefits but we're doing the right thing for our kids – many of whom just needed someone to give them a break."

However there are still more jobs than workers in the Clutha district. Mr Cadogan felt they were doing themselves and the wider region a disservice by not opening it up wider, so in 2014 helped set up a programme that transported some young unemployed Dunedin people into the area to look at a range of job opportunities.

He approached the Otago Community Trust to fund a bus to bring Dunedin young people into Balclutha.

Several jobs have been filled as a result, and a modified scheme will be rolled out again this year to continue the good work. "It has such potential to help Dunedin's high youth unemployment and to support businesses in the region."

"We're very grateful to the Community Trust to support us in what we're doing – it was a leap of faith but we're all on the same page and determined to get in and support our youth."

LITERACY NORTH OTAGO

The Otago Community Trust is supporting literacy projects in North Otago.

It works with Literacy North Otago, a community-based organisation focused on providing adult literacy skills to anyone needing to improve communication skills at any level.

The help they offer is many and varied, but includes assisting people with requirements of their workplace, and with functional literacy such as helping gain a learners drivers licence. It is also increasingly involved in assisting people with digital literacy.

An important part of Literacy North Otago's work is assisting people who have English as a second language. It is currently using Otago Community Trust funding to develop a capability project with the Tongan community to assist with communication skills.



HELP DUNEDIN'S ONLY NIGHT SHELTER

The Dunedin Night Shelter has been fundraising to purchase the buildings it uses in central Dunedin, and has until October 2015 to reach its goal of \$600,000.

The Shelter has one building offering accommodation to those who find themselves without anywhere to stay overnight, and also a building providing transitional lodgings for people who for various reasons are struggling to find mainstream accommodation.

The Otago Community Trust has pledged \$200,000 towards the appeal.

Chair David Brown said owning the building will give the Dunedin Night Shelter Trust security and reduce costs.

The Shelter operates seven days a week. It doesn't receive government funding, operating entirely on donated funds and grants. It employs a Night Shelter Manager,

supported by trained volunteers who stay overnight to supervise and support. All meals are supplied by church groups.

"We rely heavily on the generosity of these people and value their contribution. We are very grateful to the Community Trust for its support towards the building appeal – it has given us so much hope and helped us to go on."

Mr Brown said there are many different circumstances that lead people to need to use the Night Shelter, but the shelter is never empty. It has provided over 4000 bed nights to people in need since starting in 2007. There is now a growing demand in Dunedin for its emergency dinner, bed and breakfast services, and it is presently averaging 60+ bed nights a month. The Shelter is also seeing an increase in female clients with nowhere to go.



For more stories visit www.oct.org.nz

DONATIONS COMMUNITY WELLBEING

Alpine Community Development Trust	3,500
Alzheimers Society Otago Inc	6,080
Amputee Society of Otago & Southland Inc	500
Anglican Family Care	62,500
Barnardos Otago	20,000
Camp Quality South	2,500
Carers Society Otago	10,000
Catholic Social Services	32,500
CCS Disability Action Otago Inc	8,000
CCS Disability Action Waitaki Inc	10,000
Chairpersons Fund	1,000
ChatBus	19,500
Citizens Advice Bureau - Dunedin	10,000
Citizens Advice Bureau - North Otago	3,500

Clutha District Council	4,305
Disability Information Service	5,000
Disabled Citizens Soc (Otago) Inc	20,000
Dunedin City Council - Youth	1,000
Action Committee	
Dunedin Community Care Trust	2,000
Dunedin Community House Trust Inc	12,000
Dunedin Community Transport Trust	10,000
Dunedin Council of Social Services Inc	2,400
Dunedin Friend-Link Trust	5,000
Dunedin Multi Ethnic Council	2,500
Dunedin Night Shelter Trust	200,000
Dunedin Parents Centre Inc	500
Dunedin Returned And Services Assn Inc	6,000
Epilepsy Assn of NZ Inc - Otago	1,700
Habitat for Humanity Dunedin Ltd	5,000
Ignite Trust	4,980
Institute for Child Protection Studies	5,000
Literacy North Otago Inc	2,281

Malcam Charitable Trust	34,750
Methodist Mission Southern	49,000
Otago Community Hospice Trust	15,000
Otago Diabetes Research Trust	3,000
Otago Down Syndrome Assoc	5,000
Otago Healthcare Chaplaincy Support Trust	1,000
Otago Youth Wellness Trust	47,500
Parent to Parent - Otago Branch	2,000
Pregnancy Counselling Services Inc	1,000
Presbyterian Support Otago	50,000
RMH Auckland Trust	7,725
RMH South Island Trust	3,500
Robbie White Charitable Trust	400
Roxburgh District Medical Services Trust	17,000
Salvation Army New Zealand Trust	30,000
Schizophrenia Fellowship Otago Branch Inc	25,000
Servants Health Centre Trust	3,960
Shakti Dunedin	2,700
South Dunedin Voice	750

Southern District Health Board	2,500
Stopping Violence Dunedin Inc	15,000
Stroke Foundation Southern Region Inc	10,000
Taieri Parents Centre Inc	5,000
TalkLink Trust	2,500
Te Whare Pounamu Dunedin	20,000
Womens Refuge Inc	
The House of Breakthrough Trust Oamaru	1,000
The NZ Howard League for Penal Reform	7,500
The South Otago Health Support Trust	1,299
Tuapeka Community Health Company	7,500
Waitaki District Council - Safer	2,704
Waitaki Coalition	
Waitaki Multicultural Council Inc	2,500
Warm Homes Programme	400,000
Wheels to Dunstan Charitable Trust	9,000
Youthline Otago Inc	10,000

1,324,404

SPORT & RECREATION



PROUD TO HELP HOST FIFA UNDER 20 WORLD CUP GAMES

Otago Community Trust funding over the last year has helped Football South with everything from grassroots football to hosting FIFA Under 20 world cup games. Football South Chief Executive Bill Chisholm said it was a thrill for Dunedin to be in a position to host four teams for the FIFA Under 20 World Cup games in

May 2015, particularly given that one of the teams – Serbia - went on to win the tournament. “We’re grateful to the Trust for its donation towards this; it provided aspiration for many young players.” But equally important is that the Otago Community Trust funding supports a full range of programmes each year, including football and futsal in schools, talent development, coach education and representative and elite programmes. “It’s part of our leverage and legacy approach that encourages all players, from grassroots through to nurturing the elite players currently coming out of Dunedin.”



POSITIVE SPORTING BEHAVIOUR

Children’s sport should be both positive and enjoyable, which is why the Otago Community Trust has helped fund the Positive Sporting Behaviour Project. Run by Sport Otago, the new initiative is aimed at reducing poor behaviour by spectators at children’s sporting events, and encouraging positive comments around children’s achievements. Sport Otago Chief Executive John Brimble said negative comments impact on the self-esteem of players, and they discourage children from sport.

“We want to make it clear that sport is about enjoyment, and it’s not ok to be negative to your own child, other children, supporters, or the coach or referee who are all volunteers. “They’re kids not the All Blacks – they’re there to have fun.” The Project involves positive sideline packs for schools, clubs, sporting organisations and sporting venues, and posters for schools relating to sportsmanship. There is also information available on-line.



SUNNYVALE SPORTS CENTRE

A major redevelopment of the Sunnyvale Sports Centre in Dunedin has begun, with the Otago Community Trust pledging funds towards the project. Green Island Combined Sports Bodies spokesperson Graeme Wylie said the facility is being adapted from a sports centre to a community centre, to better serve the needs of the whole community. The changes will improve changing, playing and social facilities for the existing sports groups, and at the same time upgraded function areas will allow many local groups, big and small, to meet or hold events. The major revamp includes a new lounge area, adding two squash courts and a hospitality area, an office, replacing the gym floor, and renovating existing facilities. It will be able to cater for functions for around 200 people when complete. It’s hoped work will be finished by early 2016.



 **OTAGO**
Community Trust
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AUDI QUATTRO WINTER GAMES NZ 2015

Once again the world’s best winter athletes have been attracted to New Zealand’s Southern Alps for elite sporting competition for the fourth Audi quattro Winter Games NZ from August 21-30. The Otago Community Trust has supported the Winter Games NZ since the inaugural event in 2009, and has again donated funding towards running the Games. Audi quattro Winter Games NZ CEO Arthur Klap said even though it is a large international event, the event runs on a very tight budget, so the Otago

Community Trust’s continued support is hugely appreciated. “The funding we receive from the Otago Community Trust not only ensures that curling and cross-country skiing remain a core part of our programme, it also helps these sports develop their own initiatives for grass-roots participation and elite competition.” Both curling and cross-country are run by non-paid committees drawn mostly from the local communities around Naseby (curling) and the Southern Lakes (cross-country skiing).

DONATIONS SPORT & RECREATION

Alexandra BMX Club Inc	6,000
Alexandra Croquet Club	1,300
Alexandra Hockey Club	400
Bannockburn Indoor Bowling Club	400
Basketball Otago Inc	60,000
Central Otago Dance Development	300
Central Otago Hockey Assn	6,000
Central Otago Softball Assn	7,500
Challenge Wanaka Sports Trust	10,000
City of Dunedin Pipe Band	3,000
Cromwell Bike Park	65,000
Cromwell Bowling Club	25,000
Dunedin Archery Club	1,000
Dunedin City Council - South	20,000
Dunedin Cycling Project	
Dunedin Ice Hockey Association	2,450
Dunedin Ice Skating Club Inc	10,000
Dunstan Equestrian Centre	2,500
Dunstan Golf Club Inc	7,000
Football South	90,000

Sunnyvale Sports Centre	290,000
Bodies Inc (GICSB)	
GymSports NZ - Southern Region	5,000
Harbour Rugby Football Club Inc	500
IPMS Central Otago Model Society Inc	500
Kaikorai Rugby Football Club Inc	4,000
Kaitangata & District Promotions Inc	20,000
Kiwi Swim Club Inc	1,000
Macandrew Netball Club	320
Moa Creek Clay Target Club Inc	600
Moana Gow Pool Trust	12,000
Mosgiel Brass Band Inc	3,000
Netball South Zone Inc	100,000
New Zealand Ice Hockey Federation	2,500
New Zealand Olympic Luge Assn Inc	6,000
North Otago Rugby Football Union Inc	20,000
NZ Competitive Aerobics	1,500
Federation - Otago Branch	
NZ Curling Assn Inc	7,500
NZ Salmon Anglers Assn Otago Branch	4,000
NZ Special Olympics South	8,000
Island Regional Council	
Oamaru Multisport Club	1,200
Oamaru Old Boys Rugby Football Club Inc	5,000

Oamaru Poultry Pigeon & Canary Society	1,000
Otago Academy of Sport	25,000
Otago Badminton Assn Inc	15,000
Otago Country Cricket Assn	2,000
Otago Cricket Assn Inc	55,000
Otago Hockey Assn (1990) Inc	20,000
Otago Radio Control Car Club Inc	700
Otago Rowing Assn Inc	25,000
Otago Rowing Club	4,000
Otago Rugby Football Union Inc	50,000
Otago Rugby League Inc	15,000
Otago Secondary Schools Sports Assn	10,000
Otago Softball Assn Inc	15,000
Otago Sports Car Club Inc	15,000
Otago Synchronised Swimming Club	5,000
Otago Touch Assn Inc	25,000
Otago University Debating Society	3,000
Otago University Rowing Club	10,000
Port Chalmers Golf Club Inc	600
Port Chalmers Rowing Club	3,000
RNZ Coastguard Boating Education Ltd	1,350
Roxburgh Golf Club	4,500
Royal New Zealand Plunket - East Otago	1,000
Royal NZ Pipe Band Assoc - Otago Centre	1,200

Skeggs Foundation	50,000
Snow Sports NZ Inc	35,000
South Island Sporting Clay Shooters Inc	4,830
Sport Central	20,000
Sport Clutha	20,000
Sport Otago - Coachforce Athletics	25,000
Sport Otago - Coachforce Golf	25,000
Sport Otago - Fundamental Skills	7,500
Sport Otago Director	26,000
Sport Waitaki	20,000
Squash Otago Inc	25,000
Surf Life Saving New Zealand Inc	35,000
Tennis Otago Incorporated	7,500
The Otago Golf Club Inc	1,500
Tokomairiro A & P Society	7,000
Tri Pounawea	500
Volleyball Otago	7,500
Waitaki Community Recreation	1,000
Centre Trust	
Wanaka Golf Club Inc	11,000
Wanaka Tennis Club Inc	5,000
Winter Games NZ Trust	80,000

1,532,150



HERITAGE & ENVIRONMENT

NEW TRACK FOR THE CATLINS



Part of the old Catlins railway line has been given a new lease of life.

A 1.5 kilometre section of the former track has been turned into a walking and cycle track, in a partnership between Catlins Promotions Inc and the Department of Conservation. It includes a donation from the Otago Community Trust, used to help clear the overgrown reserve, repair a bridge and put up panels.

Officially opened in May, the track near Table Hill – half an hour's drive south of Owaka – runs through beautiful native bush. It incorporates access off the Matai Falls track.

The original Catlins railway line was built in the early 1900's, and ran from Balclutha to Tahakopa. It was retired in 1971, and is now predominantly farm land.



SAVING PRECIOUS FLORA AND FAUNA



Photo courtesy of Dave Comer

The Otago Community Trust is helping with a major pest control programme in the Hollyford Valley aimed at halting the decline of the area's flora and fauna.

It donated money to the Hollyford Conservation Trust to help restore and protect the native birds and bush ecology in an area of approximately 2500 hectares in the lower Hollyford Valley, and the Hollyford National Park.

The Hollyford Conservation Trust was formed in June 2014 to establish an 'island' sanctuary within the Lower Hollyford Valley in partnership with the

Department of Conservation (DoC) and other stakeholders.

The first stage is a comprehensive pest control programme targeting possums, rats and stoats. DoC initiated a control programme, then the Conservation Trust followed-up with ground work across a 900 hectare area designed to lock-in and sustain gains made through the poisoning.

Once pest populations are maintained at negligible levels there are plans for a translocation programme to return native species.



SAVING MONEY AND THE ENVIRONMENT



Dunedin sports organisations are embracing a nation-wide initiative to reduce their impact on the environment.

The Project Litefoot Trust is helping sports clubs by checking their electricity, water use and waste management, then making any changes needed to improve their environmental impact. Improvements are free, and could include installing energy-saving lightbulbs, water-saving devices, hot-water cylinder insulation and waste-sorting stations.

The aim is to reduce environmental waste, including landfill waste, and to encourage all sports club members to reduce and recycle. There are other benefits beyond reducing their environmental footprint, with the clubs involved in the Litefoot project also seeing lower running costs for their clubrooms.

Twenty six Otago clubs have already made changes, and many more are signed up to have an environmental checkup over the coming months.



HELPING OTAGO SCHOOLS TO HELP THE PLANET

The Otago Community Trust is helping Otago schools to reduce the amount of paper going into landfills.

It continues to support the Environmental Education for Resource Sustainability Trust with its national programme that provides bins for school classrooms to recycle cardboard and paper. These recycling efforts are then rewarded annually with a native tree donated to the school for each two cubic metres of recycling.

The charitable trust aims to involve young people in minimising waste and helping the environment.

154 schools and early childhood centres in Dunedin are now involved, last year diverting 921 cubic metres of paper and cardboard from the landfill, while planting 540 native trees. Nationally over 4,000 schools have recycled 36,000 tonnes of paper waste.



For more stories visit www.oct.org.nz

DONATIONS HERITAGE

Alexandra District Museums Inc	2,500
Central Otago District Council	1,500
Dhargyey Buddhist Centre Inc	40,000
Dunedin Gasworks Museum Trust	8,000
Janet Frame Eden Street Trust	2,500
NZ Institute of Surveyors	1,400
(Coastal Otago Branch)	
Oamaru Victorian Heritage	10,000
Celebrations Committee	
Otago Museum	100,000
Paradise Trust	30,000
Pukehiki Church Trust	7,500
South Otago Historical Soc Inc	10,000
St Martin Island Community Inc	7,000
St Paul's Cathedral	3,000
Total	223,400

DONATIONS ENVIRONMENT

Catlins Promotions Inc	5,200
Coal Creek Cycleway Trust Inc	10,000
Environmental Education for Resource Sustainability Trust	3,000
Hawea Food Forest	3,500
Hollyford Conservation Trust	90,000
Lindis Pass Conservation Group Inc	2,000
Otago Fish & Game Council	1,500
Pisa Alpine Charitable Trust	4,000
Project Litefoot Trust	20,000
Upper Clutha Tracks Trust	22,000
Yellow-Eyed Penguin Trust	7,000
Total	168,200



2015 Trustees: Back Row (L to R) Susie Johnstone, Peter Chin, Pip Laufiso, Gina Huakau, Colin Jackson, Stephen Kornyei (Deputy Chairperson), Noeline Munro, Lauren Semple, Kate Hazlett. Front Row (L to R) Helen Webster, Ross McRobie (Chairperson), Barbara Bridger (Chief Executive)

SUMMARY CONSOLIDATED FINANCIAL STATEMENTS

For the Year Ended 31 March 2015

SUMMARY STATEMENT OF COMPREHENSIVE INCOME

For the year ended 31 March 2015

	2015 (\$000's)	2014 (\$000's)
Revenue	31,098	18,535
Expenditure	(987)	(1,119)
Surplus before donations	30,111	17,416
Donations approved during the year	(4,321)	(4,454)
Surplus before taxation	25,790	12,962
Income tax (expense)/refund	3	(3)
Surplus for the year	25,793	12,959
Other comprehensive income	-	-
Total comprehensive income for the year	25,793	12,959

SUMMARY STATEMENT OF CHANGES IN TRUST FUNDS

For the year ended 31 March 2015

	2015 (\$000's)	2014 (\$000's)
Total trust funds at the beginning of the year	238,887	225,928
Plus total comprehensive income for the year	25,793	12,959
Total trust funds at the end of the year	264,680	238,887

SUMMARY BALANCE SHEET

As at 31 March 2015

	2015 (\$000's)	2014 (\$000's)
Assets		
Property, plant and equipment	1,584	1,616
Other investments	263,593	237,673
Other non-current assets	5	14
Total non-current assets	265,182	239,303
Cash and cash equivalents	1,190	753
Other current assets	41	44
Total current assets	1,231	797
Total assets	266,413	240,100

Trust funds	264,680	238,887
Trade and other payables (including donations)	1,581	1,049
Total current liabilities	1,581	1,049
Deferred tax liability	152	164
Total non-current liabilities	152	164
Total liabilities	1,733	1,213
Total trust funds and liabilities	266,413	240,100

Approved on behalf of the Trustees:

 Chairperson, 23 June 2015
 Trustee, 23 June 2015

SUMMARY STATEMENT OF CASHFLOWS

For the year ended 31 March 2015

	2015 (\$000's)	2014 (\$000's)
Net cash outflow from operating activities	(4,559)	(5,651)
Net Cash from/(used) in investing activities	4,996	5,996
Net cash from/(used) in financing activities	-	118
Net (decrease)/increase in cash and cash equivalents	437	463
Cash and cash equivalents at 1 April	753	290
Cash and cash equivalents at 31 March	1,190	753

NOTES TO THE SUMMARY FINANCIAL STATEMENTS

For the year ended 31 March 2015

These are the summary financial statements of Otago Community Trust for the year ended 31 March 2015.

The specific disclosures included in these summary financial statements have been extracted from the full annual financial statements dated 23 June 2015. The full annual financial statements dated 23 June 2015 have been prepared in accordance with the New Zealand Equivalents to International Financial Reporting Standards (NZ IFRS).

This summary financial report cannot be expected to provide as complete an understanding as provided by the full financial statement of the financial performance, financial position and cash flows of the Trust.

An unqualified audit opinion has been received on the full financial statements for the year ended 31 March 2015. A copy of the full Trust financial statements for the year ended 31 March 2015 may be obtained by contacting the Trust on (03) 479 0994.

This summary financial report has been examined by our auditor for consistency with the full financial statements. An unqualified audit opinion has been received. These summary financial statements were approved for issue by the Trustees on 23 June 2015.

Basis of preparation

Otago Community Trust is a public benefit entity and was incorporated as a Charitable Trust in accordance with the provisions of the Community Trusts Act 1999.

These are the summary consolidated financial statements of Otago Community Trust and its wholly owned subsidiary Fillmor House Limited and they comply with FRS 43: Summary Financial Statements. The presentation currency is New Zealand dollars, rounded to the nearest thousand dollar.

The full consolidated financial statements upon which these Summary Financial Statements are based, have been prepared to comply with the NZ GAAP and the Financial Reporting Act 2013.

Specific accounting policies

All specific accounting policies have been applied on the same bases as those used in the full consolidated financial statements of the Trust.

Changes in accounting policies

The accounting policies have been applied consistently to all periods presented in these summary financial statements, there have been no changes in accounting policies during the year.

INDEPENDENT AUDITOR'S REPORT

On the Summary Financial Statements to the Trustees of Otago Community Trust

Deloitte

Report on the Summary Financial Statements

The accompanying summary financial statements of Otago Community Trust and subsidiaries ('the Group') on page 8, which comprise the summary consolidated balance sheet as at 31 March 2015, and the summary consolidated statement of comprehensive income, summary consolidated statement of changes in trust funds and summary consolidated statement of cash flows for the year then ended, and related notes, are derived from the audited consolidated financial statements of the Group for the year ended 31 March 2015. We expressed an unmodified audit opinion on those financial statements in our report dated 23 June 2015.

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 consolidated financial statements of the Group.

This report is made solely to the Trustees, as a body, for the purpose of expressing an opinion on the summary financial statements for the year ended 31 March 2015. Our audit has been undertaken so that we might state to the Trustees those matters we are required to state to them in an auditor's report on summary financial statements and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Trustees as a body, for our

Related parties

Several Trustees of the Community Trust and key management personnel have a key relationship with organisations which were recipients of donations during the year. The details are as follows:

Trustee	Recipient Organisation	Donation Amount (\$) 2015	Donation Amount (\$) 2014
Mr Stuart Walker (retired May 2014)	Musical Theatre Dunedin	0	36,000
	Taieri Musical Society	0	40,000
	WOW! Productions	0	3,000
		0	79,000
Mr Ross McRobie	Queenstown Lakes District Council – Summerdaze Festival	5,000	5,000
	Warbirds Over Wanaka	0	5,000
	Snow Sports (NZ)	0	35,000
		5,000	45,000
Ms Gina Huakau	Pacific Trust Otago	0	5,000
	Te Hou Ora Otepoti Inc.	0	45,000
	Dunedin City Council – Youth Action Committee	1,000	0
	Dunedin City Council – Puaka Matariki Celebrations	7,500	5,000
Mr Colin Jackson		8,500	55,000
	Oamaru Old Boys Rugby Football Club Inc.	5,000	0
	North Otago Rugby Football Union Inc.	20,000	20,000
	North Otago Primary Principals Association	4,000	0
Mr Stephen Kornyei		29,000	20,000
	For Trades (Chamber of Commerce)	22,000	15,000
	The Otago Early Childhood & Schools Maori & Pacific Island Festival Trust	7,500	5,000
	Pacific Trust Otago	0	5,000
Ms Pip Laufiso	Te Hou Ora Otepoti Inc.	0	45,000
	Otago Polytechnic – Dunedin School of Art	750	750
	Otago Polytechnic – Pacific Island Scholarships	7,500	7,800
		15,750	63,550
Mrs Kate Hazlett	Roxburgh District Medical Services Trust	17,000	0
	Roxburgh Golf Club	4,500	0
		21,500	0
Mr Peter Chin	Age Concern Otago Inc.	0	10,000
	Alzheimers Society Otago Inc.	6,080	0
		6,080	10,000
Mrs Noeline Munro	Wanaka Tennis Club	5,000	0
	Wanaka Golf Club	11,000	0
		16,000	0
Mrs Susie Johnstone	Dunedin City Council	34,884	13,200
	Otago Polytechnic	34,500	8,550
	Roxburgh District Medical Services Trust	17,000	0
	Tuapeka Community Health Company	7,500	0
Mrs Helen Webster		93,884	21,750
	North Otago Rugby Football Union Inc.	20,000	20,000
	Waitaki District Council – Safer Waitaki Coalition	2,704	0
		22,704	20,000

Key Management Personnel

Mrs Carol Melville	Otago Theatre Trust	0	20,000
	Disabled Citizens Society (Otago) Inc.	20,000	500
	Special Olympics NZ	0	40,000
	NZ Special Olympics South Island Regional Council	8,000	5,000
	Otago Down Syndrome Association	5,000	1,500
		33,000	67,000

Mr Stuart Walker, trustee of the Otago Community Trust, was a consultant and partner with Anderson Lloyd, the law firm engaged by the Trust. The value of services obtained from Anderson Lloyd to 31 March 2015 was \$5,059 (GST excl). (2014: \$5,363).

audit work, for this report, or for the opinions we have formed.

Trustees' Responsibility for the Summary Financial Statements

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

Auditor's Responsibility

Our responsibility is to express an opinion on the summary 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*.

Other than in our capacity as auditor, we have no relationship with or interests in Otago Community Trust or any of its subsidiaries.

Opinion

In our opinion, the summary financial statements derived from the audited consolidated financial statements of Otago Community Trust and subsidiaries for the year ended 31 March 2015 are consistent, in all material respects, with those financial statements, in accordance with FRS-43: *Summary Financial Statements*.

 **Chartered Accountants**
23 June 2015
Dunedin, New Zealand