



**THE COMMUNITY TRUST OF OTAGO**

**EDUCATION**

**ARTS**

**RECREATION**

**COMMUNITY**

## Chairperson's Annual Report

On behalf of the Board of Trustees, I am pleased to present the Annual Report on the activities of the Trust for the year ended 31 March 2006.

### The Trust Fund

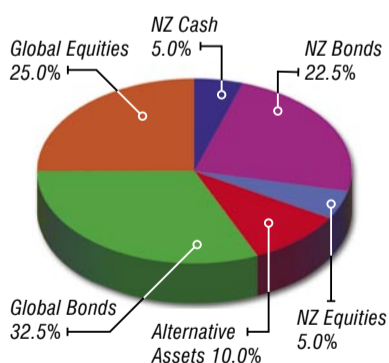
The original capital was derived from the sale of shares in Trust Bank New Zealand in the mid 1990's. The sale of shares at that time yielded \$131 million and that amount has been inflation adjusted in order to preserve its real value.

At balance date the position of the Fund was as follows:

Inflation adjusted value of original capital	<b>\$167 million</b>
Invested funds at 31 March 2006	<b>\$189 million</b>
Excess reserves at 31 March 2006	<b>\$22 million</b>
Total donations made over past 12 years	<b>\$75 million</b>

The donations budget for the year was set at \$5.5 million and was fully utilised. Due to the fact that the reserves are in a healthy state the trustees have set the donations budget for 2006-2007 at \$6 million.

### Current Asset Allocation



### Financial Performance

The investments of the Trust returned 14.4% or about \$24 million for the year which is a very pleasing result. Global shares returned 35% and New Zealand shares 22%. This return practically doubled the return of the previous year and is significantly higher than one would expect to earn for the mix of investments which the Trust currently holds. However, world markets remain volatile and while the current year has been particularly successful there is always the possibility of a reversal of fortunes in the future.

During the final quarter of the year the Trust decided to diversify 10% of its holdings into alternative assets. An amount of 5% was allocated to Collateralised Commodities Futures and of 5% was allocated to Fund of Hedge Funds. Alternative assets such as these tend to produce returns which are uncorrelated to our more traditional asset classes, thereby reducing the risk profile of the total portfolio. These investments were

made from funds withdrawn from New Zealand bonds.

The Trust utilises the services of five managers for its six assets classes including AMP for New Zealand cash and bonds and Tower for New Zealand shares and global bonds. The remaining global investments are managed by overseas companies. The Trust continues to engage the international firm Russell Investment Group as its investment advisor.

### Outlook

As previously indicated it is practically impossible to accurately predict returns in future years. Over the long term our current investments are assumed to return 7-8% per annum. However, the volatility of our portfolio is such that a return anywhere between 2% and 13% could be expected. Statistically, there is one chance in 14 of a negative return.

### Donations

Trustees approved donations of \$5,545,000 during the year. These donations were distributed throughout the Otago region and across all sectors of activity including education, community welfare, recreation, heritage and the arts. Major recipients included the Cromwell Community Board \$500,000 for the extensions to the town's swimming centre, \$200,000 towards the fitout of the Clyde Hospital, \$150,000 to further develop the Otago Central Rail Trail, \$125,000 for the new curling rink at Ice Sports Dunedin and \$120,000 for the Performing Arts Centre at Kings High School. In addition, under the Trust's assistance for sports development and participation as part of more healthy active lifestyles, \$667,000 was distributed to 21 regional sporting associations including \$146,000 to Sport Otago. Some 400 organisations received a donation during the year.

In addition to responding to unsolicited applications trustees continue to look across the

community for opportunities where Trust funding will make a positive difference. The Trust believes that it has a role to play in community development and, in collaboration with others, is exploring opportunities to fulfil that role.

### Trustee Appointments

Trustees are appointed or re-appointed by the Minister of Finance for a term of four years. It is generally permissible to serve two terms and in some instances a trustee may be appointed for a third term. It is pleasing to report that in May 2005 two of our current trustees, Mr Russell Hendry of Dunedin and Mrs Sally Hope of Oamaru were reappointed during the year for a second term of office. A third appointment was made to fill a vacancy created when a trustee resigned two years ago. Mrs Nicola Taylor, of Dunedin was appointed during the year and brings to the Trust her considerable experience in the areas of social services and community support.

Last month the 2006 appointments round was announced and it is pleasing to report that current trustees, Mr Bill Thomson of Balclutha and Mrs Raewynne Pedofski of Dunedin were re-appointed. Mr Alan McLay of Oamaru retired after serving as a trustee for eight years. Alan made a very significant contribution to the work of the Trust through his extensive knowledge of the North Otago community. His practical and innovative approach to community issues added much to the quality of the Trust's decision making. Trustees acknowledge with gratitude his service to the Trust. Mr Stuart Walker of Dunedin is welcomed as a new trustee appointment.

### Trustees and Staff

All trustees have made a valuable contribution to the operation of the Trust and the interests and concerns of the entire Otago community are well represented by the diligent

and hard working representatives from the city of Dunedin and the provincial districts.

I am indebted to Hilary Allison for acting as deputy chair whenever called upon to do so.

Her assistance and co-operation are sincerely appreciated.

The Trust is very well served by its chief executive Keith Ellwood, donations manager Carol Melville and support staff Fay Jackson and Megan Jackson. On behalf of all the trustees I wish to thank Keith and his team for their effective and dedicated service to the Trust.

For and on behalf of the Board of The Community Trust of Otago.

**JOHN FARRY** Chairperson  
27 June 2006

## NOTICE OF ANNUAL PUBLIC MEETING >

The 18th Annual Public Meeting of The Community Trust of Otago Inc is to be held on Tuesday 29 August 2006 at 4.30pm. Members of the public are welcome and encouraged to attend.

**VENUE:** Conference Room, 2nd floor, Dunedin Public Art Gallery, The Octagon, Dunedin.

**BUSINESS:** To report on the Trust's activities and its financial performance for the year to 31 March 2006.

**K G ELLWOOD**  
Chief Executive  
PO Box 5751, Dunedin  
Phone 03 479 0994  
or 0800 101 240 toll free.



Chairperson **John Farry**

## SUPPORT FROM THE COMMUNITY TRUST OF OTAGO



Outrageous street performance group, *The Psycho Poms*, from Dunedin, who will be performing at this year's Fringe Festival.

### THE ARTS ON SHOW >

Bringing the arts to the people is a key driver in the Community Trust of Otago's support for arts festivals in Otago.

The 'light bulb idea' for a biennial Otago Festival of the Arts – now a major cultural event - was floated by the Trust in the late 1990s, says festival director, Nicholas McBryde.

"The Trust provided the seeding funding for a feasibility study. It continues as the festival's principal partner and its contribution is integral to the festival's ongoing success."

The Otago Festival of the Arts this year runs from 6-14 October, showcasing 100 regional, national and international performers. The Trust has given \$175,000 towards festival administration and artists' costs.

"Without the Community Trust of Otago, there would not be a festival," says Mr McBryde.

Staged prior to the Otago Festival of the Arts is the Dunedin Fringe Festival, which also receives Trust backing.

The largest festival of its kind in the South Island, the fringe festival presents innovative and experimental performances from local, national and international artists.

"For many of our artists, it is a first-time opportunity to show their talents before a larger audience," says Dunedin Fringe Festival director, Paul Smith.

"The Community Trust of Otago is our largest funder and their donation for promotion and publicity enables us to connect with a wider audience."

### A TRAIL FOR EVERYONE >

Better surfaces, new shelter huts and new facilities mean the Otago Central Rail Trail is becoming increasingly accessible for everyone.

"When the trail was first being developed during the mid-1990s, it was used mostly by experienced pioneering cyclists. Today all sorts of people use it, including schools, recreational cyclists and tourists on multi-day adventures. Often they are less experienced and require better standards," says Owen Graham, the Otago Central Rail Trail Trust's executive officer.

This year's \$150,000 donation from the Trust has been used to construct 12 shelter huts, purchase an environmentally-friendly toilet to cater for people with disabilities, and for trail resurfacing work.

As part of an enabling project, the six-kilometre section from Hyde to Tiroiti and the 11-kilometre Poolburn Gorge section are being investigated for use by people with disabilities who are suitably equipped, Mr Graham says.

Accommodation bookings by rail trailers have sky-rocketed over the past three summers, with an estimated 6,500 visitors undertaking three to five-day journeys end-to-end and an estimated 80,000 day and casual users annually.

Community Trust funding, which has been ongoing since the trail was first being developed, has played

Rail trail cyclists crossing the Manuherikia No 1 Bridge at the start of the Poolburn Gorge.



a vital role in getting the trail to the level where it's now managed as a sustainable community asset, Mr Graham says.

In particular a \$100,000 donation in 1995 funded the upgrade of the Poolburn Viaduct and the Manuherikia No 1 Bridge. The work opened up the Poolburn Gorge section of the trail, described as the trail's 'jewel in the crown', he says.



THE COMMUNITY TRUST OF OTAGO

### SCHOLARSHIP STUDENTS GET RESULTS >

Otago scholarship students gained a flying start in 2005 thanks to funding from the Community Trust of Otago.

The Trust supported the Otago Secondary Schools Principals' Association's scholarship programme, which provided one hour a week of extra subject tuition for scholarship students beyond their usual schooling.

One such student is former dux of St Hilda's Collegiate, Naomi White, who achieved an outstanding pass in scholarship chemistry. She is now studying for a Bachelor of Science at Otago University.

"The programme was really helpful as it provided us with the opportunity to work on more difficult problems, compared with those we did in our Level 3 NCEA classes. It was also great to be able to access a top teacher in our subject area."

Of the 126 Dunedin students who took part in the programme in 2005, 85 gained a scholarship, a 40% increase compared with 2004. In rural Otago, 74 students received extra tuition with 29 gaining scholarships, a 93% increase. These rural students accessed tuition via OtagoNet, which also received Trust funding.

Otago Secondary Schools Principals' Association secretary, Gordon Wilson, says the programme's success is due to the Trust's willingness to support it and to the secondary schools' successful coordination of resources.

The Trust is also supporting the programme in 2006.



Caversham School students were some of 8,000 Otago students who experienced a life education lesson in the Life Education Trust's mobile classroom last year. The Community Trust of Otago has contributed to major upgrades of the mobile classrooms and to annual programme costs.



The 2005 Otago provincial rowing team at the national provincial championships held at Lake Karapiro.

### SPORT DEVELOPMENT IN TOP FORM >

Twenty-five Otago sports benefited from the Trust's Regional Sports Fund in 2005, ensuring that sport development in Otago remains in good heart.

A total of \$667,000 was distributed to support regional sport development programmes.

"The Community Trust of Otago's continued funding for the development of Otago sport is significant and extremely valuable to our regional sport organisations, allowing them to continue to provide a range of coaching and support services," says Sport Otago CEO, Paul Allison.

The sport development programmes encourage participation in sport and offer pathways to improvement at all levels, and enable sport codes to provide robust administration support.

One of the sports to benefit in 2005 was rowing, and Otago/Southland Regional Rowing Manager, Dean Horo, says the \$25,000 donation makes a huge difference to the support the region's rowers get.

"The money goes towards the cost of employing a coach education director who provides much needed guidance and advice for the region's 300 rowers. The funding means that this position is sustainable over the long-term, something that is vital to fostering the skills and talents of Otago's rowing club, and school coaches and crews."

### DIGGING UP THE PAST AT LAWRENCE >

Over the past year around 20 Otago postgraduate anthropology students have delved into the rich social and spatial history of the historic Lawrence Chinese camp.

They've taken part in three archaeological digs at the site of the town (which had its heyday in 1891), unearthing materials such as nails, celadon ware, pottery, coins, metal tools and textiles to piece together the social structure and lives of the people who lived there.

The archaeological digs - directed by the University of Otago's Anthropology Department in partnership with the Historic Places Trust - have been funded by the Community Trust of Otago via the Lawrence Chinese Camp Charitable Trust, which plans to develop a Chinese heritage interpretation centre and to reconstruct a replica village at the site. Today, only a grassed paddock, fruit trees and parts of the Chinese Empire Hotel and its stable, remain.

While the digs have fulfilled the Chinese Charitable Trust's legal requirement for a conservation plan and site interpretation before reconstruction begins, they've also created a huge learning opportunity, say dig supervisors, Associate Professor Richard Walter and Chris Jacomb.

"From our viewpoint, the project has provided local opportunities for practical student training in archaeological digging, coding and drawing methods. From a heritage perspective, the site is internationally unique, representing an intact Chinese town."

Located on the outskirts of Lawrence, the town's position at the gateway to the Central Otago goldfields makes it one of New Zealand's most important and varied early Chinese settlements.



Waitaki Youth Council members meet monthly to discuss civic issues that affect young people. The Council was established last year and received funding support from the Community Trust of Otago.

# SUMMARY CONSOLIDATED FINANCIAL STATEMENTS

**DIRECTORY >**  
For the year ended  
31 March 2006

## SUMMARY STATEMENT OF FINANCIAL PERFORMANCE

For the year ended 31 March 2006

	2006 \$000	2005 \$000
Revenue	24,130	11,865
Expenditure	(1,327)	(1,271)
Surplus Before Tax	22,803	10,594
Taxation	-	-
Net Surplus	22,803	10,594

This Net Surplus has been allocated to Uncommitted Surplus

## SUMMARY STATEMENT OF MOVEMENT IN TRUST FUNDS

For the year ended 31 March 2006

	2006 \$000	2005 \$000
Net Surplus for the Year	22,803	10,594
Total Recognised Revenues and Expenses	22,803	10,594
Less Donations Approved	(5,545)	(4,694)
Movements in Trust Funds for the Year	17,258	5,900
Trust Funds Opening Balance	171,916	166,016
Trust Funds Closing Balance	\$189,174	\$171,916

## SUMMARY STATEMENT OF FINANCIAL POSITION

As at 31 March 2006

	2006 \$000	2005 \$000
<b>SOURCE OF FUNDS</b>		
TRUST FUNDS	189,174	171,916
<b>CURRENT LIABILITIES</b>		
Accounts Payable	104	70
Donations Payable	4,139	3,667
	\$193,417	\$175,653

### EMPLOYMENT OF FUNDS

<b>CURRENT ASSETS</b>		
Current Account	171	170
Short Term Bank Deposits	1,450	371
Debtors	-	2
	1,621	543
<b>NON CURRENT ASSETS</b>		
Managed Funds	190,441	173,726
Fixed Assets	1,107	1,136
Advance to Dunedin Community House Trust	248	248
	191,796	175,110
	\$193,417	\$175,653

## SUMMARY STATEMENT OF CASHFLOWS

For the year ended 31 March 2006

	2006 \$000	2005 \$000
Net Cash (Outflow) from Operating Activities	(1,086)	(1,110)
Net Cash Inflow from Investing Activities	7,239	7,483
Net Cash (Outflow) from Funding Activities	(5,073)	(7,096)
Net Cash Inflow / (Outflow) from Activities	1,080	(723)
Add Opening Cash Brought Forward	541	1,264
Ending Cash Carried Forward	\$1,621	\$541
Cash Comprises:		
Cash at Bank	171	170
Term Deposits	1,450	371
	\$1,621	\$541

## NOTES TO THE SUMMARY FINANCIAL STATEMENTS

For the year ended 31 March 2006

These are the summary financial statements of the Community Trust of Otago for the year ended 31 March 2006. The specific disclosures included in this summary financial report have been extracted from the full financial report dated 27 June 2006.

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

An unqualified audit opinion has been received on the full financial report for the year ended 31 March 2006. A copy of the full Trust financial statements for the year ended 31 March 2006 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 report. An unqualified audit opinion has been received. These summary financial statements were approved for issue by the Trustees on 27 June 2006.

### Basis of Preparation

The Community Trust of Otago 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 The Community Trust of Otago and its wholly owned subsidiaries, The Community Trust Amateur Sports Co Ltd, The Community Trust District Improvement Co Ltd and Fillmor House Limited.

The consolidated financial statements upon which these Summary Financial Statements are based, have been prepared to comply with the Financial Reporting Act 1993.

The Financial Statements are prepared on the basis of historical cost, except for the revaluation of Managed Funds.

### 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

There have been no changes in accounting policies during the year.

**Polson Higgs**  
BUSINESS ADVISORS

### AUDIT REPORT

To the Readers of the Community Trust of Otago, Summary Financial Statements for the Year Ended 31 March 2006.

We have audited the summary group financial statements of The Community Trust of Otago for the year ended 31 March 2006 as set out on this page.

### Responsibilities of the Board and the Auditor

The Board is responsible for preparing the summary group financial statements in accordance with generally accepted accounting practice in New Zealand. It is our responsibility to express to you an independent opinion on the financial statements presented by the Board.

### Basis of Opinion

The audit was conducted in accordance with New Zealand Auditing Standards and involved carrying out procedures to ensure the summary group financial statements is consistent with the full financial statements on which the summary group report is based. We also evaluated the overall adequacy of the presentation of information in the summary group financial statements against the requirements of FRS-39: Summary Financial Reports.

Other than in our capacity as auditor we have no relationship with or interests in The Community Trust of Otago.

### Unqualified Opinion

In our opinion, the information reported in the summary group financial statements complies with FRS-39: Summary Financial Reports and is consistent with the full group financial statements from which it is derived and upon which we expressed an unqualified audit opinion in our report dated 31 March 2006.

We completed our work for the purposes of this report on 10 July 2006.

  
Polson Higgs  
Chartered Accountants  
Dunedin

### Trustees:

John Farry (Chairperson)	Dunedin
Hilary Allison (Deputy Chairperson)	Dunedin
Duncan Butcher	Cromwell
Sally Hope	Oamaru
Russell Hendry	Dunedin
Alan McLay	Oamaru
Barbara Payton	Dunedin
Raewynne Pedofski	Dunedin
Mark Ryan	Dunedin
David Shepherd	Dunedin
Nicola Taylor	Dunedin
Bill Thomson	Balclutha

### Chief Executive:

Keith Ellwood

### Registered Office:

2nd Floor, Community Trust House  
Cnr Filleul Street & Moray Place  
Dunedin

### Auditor:

Polson Higgs, Dunedin

### Solicitor:

Anderson Lloyd Caudwell, Dunedin

### Investment Advisors:

Russell Investment Group, Auckland

### Bankers:

Westpac, Dunedin

**THE TRUST'S  
ORIGINS >**  
The Community  
Trust of Otago's  
origins date back  
to 1863 when the  
Dunedin Savings  
Bank opened in  
Princes Street.

The Bank's goal was to encourage thrift among Otago citizens and to distribute surpluses in a way that benefited the community. Over the next 135 years, the bank fulfilled its mission, and in later years became known as Trust Bank Otago.

In the banking industry restructuring of 1988, the Trust Bank Otago Community Trust was established to own and manage Trust Bank Otago shares on behalf of the people of Otago. Dividends from Trust Bank profits funded donations, thus continuing the philosophy and culture of the bank's founders.

In 1990, Trust Bank Otago merged with other regional trust banks to create Trust Bank New Zealand, which operated as a mainstream bank competing with major overseas-owned banks. Prudential concerns eventually led to the sale of Trust Bank New Zealand to Westpac in 1996.

Otago's \$131 million share of the sale proceeds is the fund that today's Community Trust trustees are responsible for preserving and using for the benefit of Otago communities. The income generated pays for donations the Trust makes. Since 1988, the Trust has paid out over \$80 million in donations, with its original \$131 million in capital expanding to \$189 million.

## DONATIONS

### ALEXANDRA

Alexandra Croquet Club Inc	\$1,000
Alexandra Golf Club	\$7,500
Alexandra Senior Citizens Club	\$1,500
Catholic Social Services - Central Otago	\$1,700
Central Otago Cricket Assn Inc	\$5,000
Central Otago Health Inc	\$200,000
Central Otago Hockey Assn - Regional Sport Development	\$6,000
Central Otago Softball Assn - Regional Sport Development	\$7,500
Dunedin College of Ed - Central Otago Education Centre	\$20,000
Dunstan Golf Club Inc	\$7,500
Iceinline Sports Complex Inc	\$2,500
Living Options Charitable Trust	\$200,000
Order of St John - Vincent Area	\$15,000
Rotary Club - Alexandra	\$20,000
St Patricks Catholic Church	
St Bathans - Omakau Parish	\$12,000
Tarras School	\$2,700

**Alexandra Total: \$509,900**

### BALCLUTHA

Allan Grange Golf Club	\$2,000
Balclutha Bowling Club Inc	\$3,000
Balclutha Genealogical Soc	\$450
Balclutha Pipe Band Inc	\$3,000
Clinton Netball Club	\$400
Clutha Country Music Club	\$1,500
Clutha District Council - Clutha Revitalisation	\$20,000
Heartland Otago/Southland Life Education Trust	\$51,400
Hillend Community Centre - CDC	\$5,000
Kaka Point Writers Group	\$500
Pukeawa Hall Committee	\$1,000
Scout Assn - Balclutha	\$1,000
South Otago Agricultural & Pastoral Soc	\$6,000
South Otago Principals Assn	\$15,000

**Balclutha Total: \$110,250**

### CROMWELL

Central Otago District Council	\$517,000
Cromwell Combined Churches Trust	\$1,000
Cromwell Patchwork Group - Cromwell Comb Soc of Arts	\$1,000
Fine Thyme Theatre Company	\$2,500

**Cromwell Total: \$521,500**

### DUNEDIN

AFS NZ Otago Chapter	\$1,000
Amputee Society of Otago & Southland Inc	\$500
Anglican Family Care	\$63,000
Anglican Family Care	\$2,860
Arai Te Uru Whare Hauora	\$5,000
Araiteuru Marae Council Inc	\$2,860
Aroha Ki Te Tamariki Trust	\$5,000
Arthritis Foundation of NZ - Dunedin Branch	\$3,000
Arthur Barnetts Smallbore Rifle Club	\$350
Athletics Otago Inc	\$1,500
Autism New Zealand - Otago Branch	\$500
Bargain Barn Dunedin Charitable Trust	\$2,860
Barnardos Otago	\$25,000
Basketball Otago Inc - Regional Sport Development	\$70,000
Blue Oyster Arts Trust	\$2,860
Bone Marrow Cancer Trust	\$150,000
Bowls New Zealand Inc - Regional Sport Development	\$30,000
Carers Soc (Otago)	\$8,000
Chairpersons Fund	\$6,000
Chamber of Commerce - Otago	\$23,000
Chisholm Park Golf Club Inc	\$15,000
Citizens Advice Bureau - Dunedin	\$5,000
City of Dunedin Pipe Band Inc	\$4,500
Cleveland Living Art Centre Charitable Trust	\$5,000
Cleveland Living Art Centre Charitable Trust	\$2,860
Collegiate Orchestra	\$900
Columba College	\$75,000
Congregational Christian Church of Samoa	\$7,500
Connections Education & Development Trust	\$350
Corstorphine School	\$4,000
Cycling NZ - Otago Centre	\$8,000
Daniel Belton and Good Company	\$5,000
Disability Information Service	\$5,000
Disabled Skiing NZ Inc	\$5,000
Drug Arm NZ Foundation - Dunedin	\$1,500
Dunedin Amenities Soc Inc	\$3,000
Dunedin Archery Club	\$2,000
Dunedin Brass Inc	\$15,000
Dunedin Budget Advisory Service	\$4,000
Dunedin City Council - Dunedins Collected Stories	\$5,000
Dunedin City Council - Industry Training	\$2,000
Dunedin City Council - NZ Masters Games	\$30,000
Dunedin Civic Orchestra Inc - t/a Southern Sinfonia	\$50,000
Dunedin College of Education	\$7,500
Dunedin Community Care Trust	\$16,000
Dunedin Community Transport Trust	\$2,860

Dunedin Composers Group	\$1,000
Dunedin Council of Social Services Inc	\$2,860
Dunedin Environment Centre	\$2,860
Dunedin Friend-Link Trust	\$5,000
Dunedin Fringe Arts Trust	\$35,000
Dunedin Fringe Arts Trust	\$2,860
Dunedin Horticultural Soc Inc	\$3,000
Dunedin Hospital Childcare Centre Assn Inc	\$45,000
Dunedin Kindergarten Assn	\$2,860
Dunedin Kindergarten Assn	\$2,700
Dunedin Marine Search & Rescue Advisory Committee Inc	\$11,900
Dunedin Methodist Mission - Methodist Connect	\$50,000
Dunedin Methodist Mission - Methodist Connect	\$2,860
Dunedin Midwinter Celebration	\$5,000
Dunedin Midwinter Celebration	\$2,860
Dunedin Multi Ethnic Council Inc	\$2,860
Dunedin Open Gardens Assn	\$500
Dunedin Opera Co Inc t/a Opera Otago	\$15,000
Dunedin Parents Centre Inc	\$1,500
Dunedin Public Libraries - Dunedin City Council	\$2,860
Dunedin Repertory Soc Inc	\$2,000
Dunedin Returned Services Choir	\$3,000
Dunedin Rhododendron Festival Trust	\$5,000
Dunedin Santa Parade Trust	\$15,000
Dunedin Senior Chinese Assn	\$1,000
Dunedin Stroke Club	\$4,000
Dunedin Town Hall Organ Trust	\$1,000
Dunedin Youth Orchestra Inc	\$3,000
Eagles Golfing Soc of Otago	\$200
East Otago Smallbore Rifle Assn Inc	\$2,000
Employment Scholarship Trust - Launchpad	\$5,000
Epilepsy Assn of NZ Inc - Otago	\$5,000
ESOL Home Tutors Dunedin Inc	\$1,000
Fairfield School	\$4,000
Fire Performing Club - OUSA	\$500
Fortune Theatre Trust	\$25,000
Fortune Theatre Trust	\$2,860
Friends of the Globe Theatre Inc	\$2,860
Geological Society of NZ	\$7,250
George Street Normal School	\$800
Girl Guides Assn - 21st Otago Wakari Brownie Pack	\$315
Go Otago Expo Trust	\$18,000
Grants Braes Kindergarten	\$1,500
Green Island Toy Library	\$500
Halberg Trust - Sport Otago - Regional Sports Development	\$20,000
Halfway Bush Primary School	\$2,000
HealthCare Otago Charitable Trust	\$3,000
Hearing Dogs for Deaf People NZ	\$4,000
Heritage Roses NZ Inc	\$3,000
Ice Sports Dunedin (Inc)	\$125,000
IDEA Services Otago	\$16,500
India NZ Dunedin	\$500
Indonesian Community Assn - OUSA	\$850
International Festival Environment Science & Technology	\$50,000
Kaikorai Grays Sport & Travel Inc	\$1,000
Kaikorai Presbyterian Church	\$2,000
Keep Dunedin Beautiful Committee	\$1,000
Kings High School	\$120,000
La Leche League - Mornington	\$200
Liberton Christian School	\$1,000
Lifeline Christchurch	\$7,500
Logan Park High School	\$13,500
Macandrew Bay School	\$890
Malcarn Charitable Trust	\$35,000
Maori Hill AFC Junior Club	\$2,500
ME Information and Support Service Otago Inc	\$2,000
Mid Otago Federation Country Women's Institute	\$3,000
Mopanui Ecological Environmental Soc	\$2,860
Mornington Kindergarten	\$5,000
Mornington Playcentre	\$750
Mornington Roslyn Lawn Tennis Club Inc	\$6,000
Mountainbiking Otago Inc	\$3,000
National Science Technology Roadshow Trust	\$4,500
Netball Otago Inc - Regional Sports Development	\$60,000
Netball Otago Inc	\$5,500
New Zealand Opera Ltd	\$15,000
North East Valley Baptist Community Trust Board	\$4,000
North End Rowing Club Inc	\$3,500
NZ Academy of Sport - South Island	\$39,000
NZ Book Council	\$3,000
NZ CCS Otago Inc	\$4,000
NZ Foundation for Character Education Inc	\$1,000
NZ Marine Studies Centre	\$2,860
NZ National Youth Choir	\$2,500
NZ Special Olympics South Island Regional Council	\$6,000
NZ Tree Crops Assn - Coastal Otago Branch	\$2,000
One-80 Degrees South	\$5,000
Otago Amateur Weightlifting Assn	\$7,500
Otago Amateur Weightlifting Assn - Regional Sports Development	\$5,000
Otago Badminton Assn Inc - Regional Sports Development	\$15,000
Otago Boxing Assn	\$1,000
Otago Central Rail Trail	

Charitable Trust	\$150,000
Otago Centre - Piping & Dancing Assn of NZ Inc	\$1,500
Otago Chinese Culture Assn - OUSA	\$1,000
Otago Cricket Assn	\$60,000
Otago Diabetes Research Trust	\$43,600
Otago Embroiderers Guild Inc	\$300
Otago Employment Trust - Youth Works	\$2,860
Otago Festival of the Arts	\$225,000
Otago Girls High School	\$2,000
Otago Hockey Assn (1990) - Sport Otago - Regional Sports Development	\$45,000
Otago Hockey Assn (1990) - Sport Otago	\$2,860
Otago Life Education Trust	\$14,800
Otago Medical Research Foundation	\$80,000
Otago Model Engineering Soc Inc	\$4,000
Otago Museum	\$200,000
Otago Officers Club Inc	\$10,000
Otago Pacific Peoples Health Trust	\$2,860
Otago Playcentre Assn	\$4,000
Otago Playcentre Assn	\$2,860
Otago Polytechnic - Fashion & Design	\$2,000
Otago Postgraduate Medical Soc Inc	\$45,000
Otago Rowing Assn - Regional Sports Development	\$25,000
Otago Rowing Assn	\$6,440
Otago Rugby Football Union Inc - Regional Sports Development	\$50,000
Otago Salmon Hatchery Trust	\$2,860
Otago Samoan Students Assn	\$850
Otago Secondary Principals Assn	\$40,000
Otago Secondary Schools Music Festival Soc Inc	\$3,000
Otago Secondary Schools Sport Assn	\$5,000
Otago Softball Assn Inc - Regional Sports Development	\$15,000
Otago Spinning & Weaving Assn	\$700
Otago Sports Car Club Inc	\$17,500
Otago Surf Life Saving Assn	\$28,000
Otago Surf Life Saving Assn - Regional Sports Development	\$17,500
Otago Tennis Assn - Regional Sports Development	\$25,000
Otago Theatre Trust	\$7,000
Otago Theatre Trust	\$2,860
Otago Touch Assn - Regional Sports Development	\$25,000
Otago University Rowing Club	\$32,000
Otago University Squash Racquets Club	\$3,000
Otago University Students Assn - International Students	\$850
Otago Water Ski Club Inc	\$5,000
Otago Yachting Assn Inc - Regional Sports Development	\$10,000
Otago Youth Adventure Trust Inc	\$10,000
Outward Bound Trust of NZ	\$62,500
Panache Inc	\$3,000
Parenting with Confidence Inc	\$1,000
Philanthropy NZ	\$3,000
Pikiake Te Rito Trust	\$2,860
Pine Hill School	\$2,000
Port Chalmers Early Settlers Historical Soc	\$5,000
Port Chalmers Town Hall Soc Inc	\$5,000
Port Chalmers United Rowing Club	\$3,000
Portobello Community Inc	\$15,000
Portobello Volunteer Fire Brigade	\$3,500
Presbyterian Support Services	\$150,000
Presbyterian Support Services	\$2,860
Prisoners Aid & Rehabilitation Soc Inc	\$3,000
Quilters and Patchworkers of Otago Inc	\$7,500
Ravensbourne Environmental Trust	\$1,000
Really Authentic Gilbert and Sullivan Performance Trust	\$10,000
Roslyn Kindergarten	\$7,500
Royal New Zealand Ballet	\$25,000
Royal NZ Foundation for the Blind	\$20,000
Royal NZ Pipe Band Assn Otago Centre Inc	\$2,600
Rudolf Steiner School Trust (Otago) Inc	\$1,500
Salvation Army	\$50,000
Samoan Advisory Council Dunedin Inc	\$2,000
Schizophrenia Fellowship Otago Branch Inc	\$100,000
Scorpion Club Inc	\$5,000
Scout Assn - Fairfield	\$1,000
Scout Assn - Opoho	\$500
Skeggs Foundation	\$60,000
Soccersouth - Regional Sports Development	\$20,000
Soccersouth	\$2,860
South Dunedin Christian Network	\$1,000
Southern Area Judo Assn - Regional Sports Development	\$2,000
Southern Brass Academy Trust	\$15,000
Southern Festival of Speed Inc	\$7,500
Southern Festival of Speed Inc	\$2,860
Southern Gymnastics Academy	\$3,000
Southern Heritage Trust	\$2,860
Southern Youth Choir	\$1,500
Special Olympics Otago	\$3,000
Sport Otago - Coachforce - Regional Sports Development	\$100,000
Sport Otago - Sport Waitaki - Regional Sports Development	\$16,000
Sport Otago - Sport Central - Regional Sports Development	\$10,000
Squash Chamber Music	\$1,000
Squash Otago Inc - Regional Sports Development	\$25,000

## HOW TO APPLY FOR A DONATION

### Who may apply

Any not-for-profit organisation which carries out charitable, cultural or recreational activity or which provides a benefit to a significant sector of our community. Individuals and commercial businesses do not qualify.

### What to apply for

Eligible projects cover a wide range of activities including programmes, amenities and equipment, which provide benefits for Otago people. The Trust generally does not contribute to debt reduction, travel costs or endowments.

### When to apply

Anytime. There are no close-off dates.

Just remember that only one donation will be approved to any organisation during the Trust's financial year which ends 31 March. It takes about two months before a decision is notified.

### How to apply

Use our standard application form, which we can send to you on request or which you may download from our website: [www.cto.org.nz](http://www.cto.org.nz)

Application forms are also available from branches of Westpac, Information Centres and Libraries.

### For more information

Visit our website: [www.cto.org.nz](http://www.cto.org.nz) or phone us on 479 0994 or toll free on 0800 10 12 40.

St Bernadettes Gymnastics Club	\$750
St Clair School	\$24,000
St Johns Parish - Roslyn	\$19,000
St Kilda Brass Band Inc	\$8,000
St Kilda Kindergarten	\$1,400
State Highway 88 Beautification Trust	\$2,000
Stop Trust	\$10,000
Straight Up Trust	\$2,500
Taieri Mouth Amenities Soc	\$10,000
The Lost Tribe	\$300
Tomahawk School	\$295
Trust Waikato	\$4,201
University of Otago - Human Performance Centre	\$10,000
University of Otago - Humanities Division	\$50,000
University of Otago - NZ Marine Studies Centre	\$50,000
Willing Workers Ltd	\$3,000
Willing Workers Ltd	\$2,860
Yellow-eyed Penguin Trust	\$125,000
YWCA of Dunedin	\$2,860
YWCA of Dunedin	\$1,000
Zero	\$1,000

**Dunedin Total: \$3,942,201**

### MILTON

Clutha District Council - Lovells Flat Recreational Reserve	\$3,000
Clutha Valley Christian Trust	\$2,000
Kaitangata Bible in School	\$500
Lawrence Area School	\$6,000
Lawrence Chinese Camp Charitable Trust	\$70,000
Lawrence Heritage & Cultural Charitable Trust	\$30,000
Milton Coronation Hall Soc Inc	\$2,500
Milton Elder CARE Trust	\$685
Milton Primary School	\$1,500
Moanariri Crib Owners Assn	\$2,000
Order of St John - Lawrence	\$15,000
St Patricks Church	\$6,000
Toko Golf Club	\$3,000
Toko Rugby Football Club	\$25,000
Tokomairiro High School	\$3,000
Tokomairiro Historical Society Inc	\$2,860
Waihola Looking Forward Inc	\$40,000
Waitahuna Collie Dog Club	\$1,000
Waitahuna War Memorial Hall	\$2,500

**Milton Total: \$216,545**

### MOSGIEL

Arahina Community House Trust	\$7,000
Arthur Burns Early Learning Centre	\$250
Berwick Pool Trust	\$2,000
Dunedin Kart Club Inc	\$17,000
East Taieri Preschool Inc	\$985
Green Street Early Childhood Centre	\$10,000
Kids Art	\$750
La Leche League - Taieri	\$300
Mosguel Central Kindergarten	\$3,000
Mosguel Coronation Hall Development Trust	\$3,000
Mosguel Memorial RSA Bowling Club	\$400
Outram Public Library	\$500
Outram School	\$18,000
St Chads Anglican Church Parish	\$2,000
St Marys School - Mosgiel	\$6,000
Strath Taieri School	\$4,500
Taieri Christian Care Trust	\$2,000
Taieri College	\$7,500
Taieri Competitions Society	\$500
Taieri Dramatic Soc	\$1,000
Taieri Historical Society Inc	\$2,000
Taieri Musical Society Inc	\$3,000

**Mosguel Total: \$91,685**

### OAMARU

45 South Television Inc Soc	\$2,860
Aoraki Secondary Schools Sports Directorate	\$2,000
Arthritis Foundation of NZ - North Otago	\$1,000
Boys Brigade 2nd Oamaru Company	\$600
Citizens Advice Bureau - North Otago	\$3,000
Dunroon & Dist Development Assn Inc	\$1,430
Herbert Heritage Group	\$1,000
Janet Frame Eden Street Trust	\$6,000

Literacy North Otago Inc	\$3,000
Mental Health Oamaru Combined Network	\$200
Miniature Horse Club of North Otago	\$500
North Otago Asthma Society Inc	\$1,000
North Otago Budget Advisory Service	\$3,000
North Otago Cat Fanciers Club Inc	\$500
North Otago Rugby Football Union	\$3,500
North Otago Special Olympics	\$3,000
NZ CCS Waitaki Inc	\$7,000
NZ Oamaru Live Stone Art Inc	\$7,500
NZ Riding for the Disabled - North Otago	\$5,000
Oamaru Combined Churches	\$1,000
Oamaru Multisport Club	\$500
Oamaru North School	\$750
Oamaru Pacific Island Community Inc	\$4,000
Oamaru Performing Arts Society Inc	\$150
Oamaru Poultry Pigeon & Canary Soc	\$200
Oamaru Rowing Club Inc	\$3,000
Oamaru Steam & Rail Restoration Soc Inc	\$8,000
Oamaru Stroke Support Group	\$2,500
Oamaru Tap Dancing Assn	\$750
Oamaru Victorian Heritage Celebrations Committee	\$5,600
Omarama Gliding Club Inc	\$1,500
Orwell Street Gospel Chapel Oamaru	\$2,000
Otematata Golf Club Inc	\$11,000
Scout Assn - St Patricks	\$750
St Kevins College	\$12,000
St Thomas Church Omarama	\$1,000
Valley Rugby Football Club Inc	\$3,000
Waitaki Dist Council - Waitaki Development Board	\$80,000
Waitaki District Council - Youth Council	\$5,000
Waitaki Girls High School	\$10,000
Waitaki Summer Music Camp	\$1,000
Waitaki Woodturners Guild	\$3,000
Weston Playcentre	\$1,700
Whitestone Artists Collective	\$2,860
Whitestone Waitaki Cultural Group	\$2,000

**Oamaru Total: \$215,350**

### OTAGO

Otagonet	\$12,500
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**Otago Total: \$12,500**

### RANFURLY

Cambrian Valley Trust	\$20,000
Cavalcade Host Town Comm Inc	\$2,000
Maniototo Curling International Trust	\$7,500
NZ Curling Assn Inc - Regional Sports Development	\$7,500
Rural Art Deco Maniototo Inc	\$6,000

**Ranfurlly Total: \$43,000**

### WAIKOUAITI/ PALMERSTON

Big Steps Educare	\$1,500
East Otago Woodturners	\$750
Flag Swamp School	\$800
Katiki Point Penguin Trust	\$1,000
Palmerston Mini Show	\$750
Palmerston Primary School	\$35,000
Palmerston Toy Library	\$500
Purakau	