



Otago Community Trust

STRATEGY

Te Rautaki – Te Rakatōpū ā-Hapori ki Ōtākou

Our Vision – **Tā Mātau Arokanui:**

Empowered People
He iwi whai mana

Thriving Communities
He Hāpori Ora

Sustainable Environments
He Ao Mauroa

This vision reflects what communities across Otago told us matters most – people with the capability and opportunity to participate and lead, strong and connected communities, and healthy natural environments that support long-term wellbeing.

The three parts of the vision are interconnected. Human capability, community wellbeing, and environmental stewardship reinforce each other and must be supported together over time.

Our Mission – **Tā Mātau Whāika:**

We invest, grant and collaborate so Otago can thrive – today, tomorrow and forever
**Ka haumia, ka whakaratoa, ā, e mahi pakihiwi tahi ana kia ora rā ia a Ōtākou –
mai i te inamata, ki te anamata, ki te āke āke**

Our mission describes what OCT does and how we do it.

- We invest – as stewards of a perpetual community asset.
- We grant – through fair and robust processes.
- We collaborate – through partnership, relationships and shared insights.



Our Values – Ō Mātau Uara:

Our values guide how we work, how we make decisions and how we show up for Otago communities.

People and Place – He tākata, he whenua

- We demonstrate manaaki, empathy and respect.
- We care for each other and the places we live.
- Communities, whānau and individuals matter – your wellbeing and voice guide our decisions.

Equity of Opportunity – Mana Taurite

- We make it easy for people and groups to seek support.
- We support initiatives that address inequality and help people reach their potential.
- We prioritise fairness by directing funding to where need is greatest.

Relationships – Whakapirika

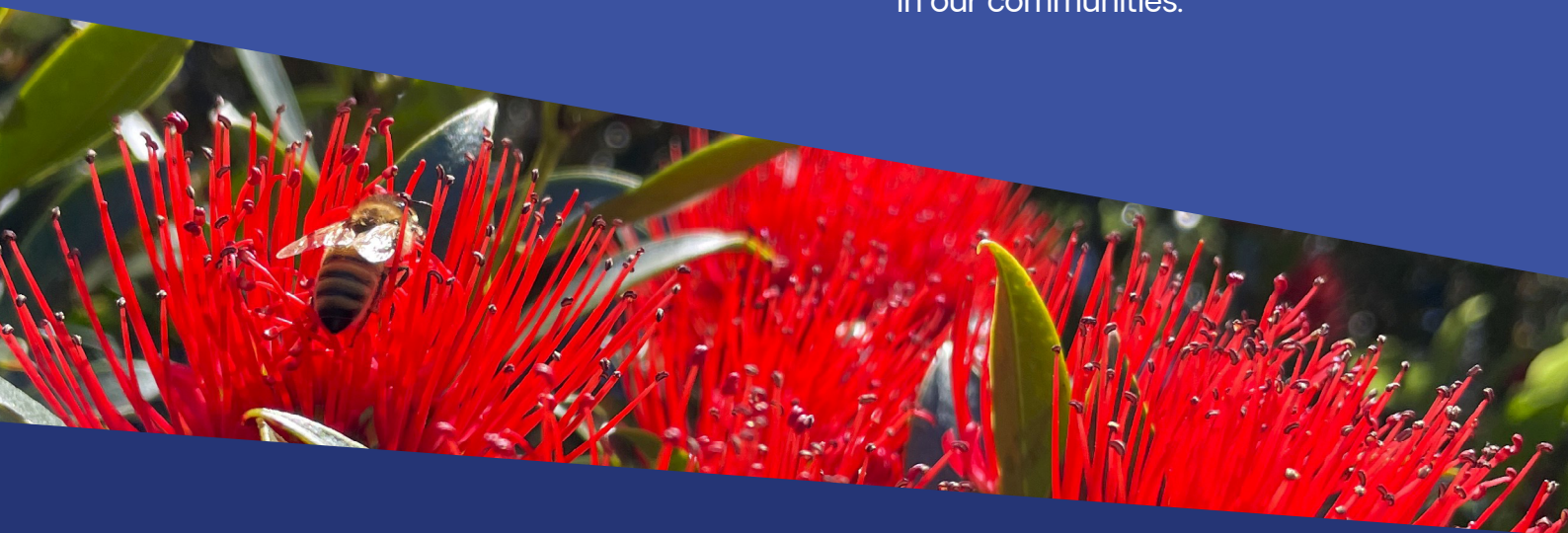
- Relationships are central to impact.
- We listen and include to build strong, respectful relationships.
- We value collaboration and shared learning.

Integrity – Pono

- We act with honesty and openness.
- We earn and maintain trust through sincerity and our actions.
- We ask: would we be proud to tell our community about this decision?

Stewardship – Tauwhirotaka

- We are kaitauwhiro of the Trust's pūtea as a perpetual asset belonging to the Otago community.
- We plan, act and invest intergenerationally.
- We support intergenerational wellbeing in our communities.



How we work – **Ā mātau whanoka mahi**

Otago Community Trust plays several roles

We are a FUNDER –

He KAITUKU PŪTEA mātau.

- We invest in people, organisations and initiatives that strengthen community wellbeing across Otago – supporting both immediate needs and long-term outcomes.

We are a PARTNER –

He HOA PĀTUIA mātau.

- We work alongside communities, mana whenua, organisations and leaders to support shared priorities, enable collaboration and strengthen collective impact.

We are a CONNECTOR –

He RIKA WHIRIWHIRI mātau.

- We bring people, organisations and ideas together. We connect communities to opportunities, organisations to each other, and funding to where it can make the greatest difference, helping to strengthen relationships and support more connected responses to complex challenges.

We are a STEWARD –

He KAITAUWHIRO mātau.

- We are kaitauwhiro of community capital. We act with care and discipline to ensure the Trust's resources are used wisely, balancing the needs of communities today with our responsibility to future generations.

To do this well, Otago Community Trust works across three areas:

- **Funding** – this is central to what we do – investing in people, organisations and initiatives that strengthen community wellbeing.
- **Asset Management** – protecting and growing community capital for long-term impact and to support our mission.
- **Effective organisation** – ensuring we have the people, systems and ways of working needed to serve communities well.

Our commitment to mana whenua – **Tō mātau tautoko tauraki ki te mana whenua**

The Otago Community Trust recognises Kā Papatipu Rūnaka o Araiteuru – being Te Rūnanga o Moeraki, Kāti Huirapa Rūnaka ki Puketeraki, and Te Rūnanga o Ōtākou – and Hokonui Rūnanga within South Otago, as primary mana whenua within our funding boundary. The Trust commits to collaborating with Kā Papatipu Rūnaka o Araiteuru as reflected in our Relationship Agreement.

The Trust recognises the constitutional importance of Te Tiriti o Waitangi and we take into account its principles in interpreting and fulfilling our Trust Deed. In so doing, we are guided by the Ngāi Tahu Claims Settlement Act 1998 and seek to give effect to the promise of a 'new age of cooperation' with Kāi Tahu.

Our funding pillars – **Kā pou tuku pūtea**

To provide clarity and focus, OCT will organise its funding activity through three pillars in future. These pillars align directly with OCT's vision and reflect what communities across Otago told us matters most for long-term wellbeing and resilience. These pillars are not silos. Community challenges and opportunities are interconnected, and many initiatives will contribute to more than one pillar.

The three pillars are designed to work together, not separately. We acknowledge that many projects and services will contribute to all three pillars. Trustees will consider the full contribution of applications across pillars, rather than forcing artificial categorisation.

We intend to continue funding across a wide range of sectors under these pillars, as we currently do.

01

Empowered People – He Iwi Whai Mana

People, whānau and organisations with the capability to thrive

Purpose: to support people and whānau to be well, connected, capable and able to participate fully in community life.

Our community engagement highlighted growing pressure on wellbeing systems, increasing demand for support services, and the importance of investing in people, not only programmes. Communities also emphasised youth wellbeing, leadership development and organisational capability as critical long-term investments.

This pillar recognises that strong communities depend on supported people, capable organisations and confident leaders.

02

Thriving Communities – He Hapori Ora

Connected, resilient and locally-led communities

Purpose: to support strong, connected and resilient communities where people can participate, belong and contribute.

Communities across Otago told us that connection, participation and local leadership are essential foundations for wellbeing. They highlighted the depth of commitment and contribution made by community organisations and volunteers, while also noting the growing demands they are carrying.

This pillar recognises social, cultural and civic community infrastructure as vital to long-term wellbeing and resilience.

03

Sustainable Environments – He Ao Mauroa

Healthy environments supporting long-term wellbeing

Purpose: To protect and restore Otago's natural environment and support communities to adapt and respond to environmental change.

Across Otago, communities expressed strong commitment to environmental stewardship and concern about climate and environmental pressures. Natural environments are central to regional identity, wellbeing and long-term resilience.

This pillar recognises that environmental wellbeing and community wellbeing are interconnected, and that local environmental action contributes to long-term community strength.

Our funding framework – Tā mātau aka pūtea

The needs of Otago communities continue to evolve. Through this strategy review, communities highlighted changing social, environmental and economic challenges, alongside new opportunities for impact.

As part of implementing this strategy, the Trust will review its funding framework to ensure it remains aligned with community aspirations, emerging opportunities and long-term impact, and the vision and values we are committing to through this strategy.

We are committed to developing a funding framework that is informed by the community.

We are advancing this work as quickly as possible – but also taking great care. We acknowledge the importance of our funding framework to the community and organisations.

We hope to share an update with the community by the end of the 2026 calendar year.

Our investment strategy – Tā mātau rautaki haumi

Otago Community Trust are kaitiaki of an investment portfolio which is designed to serve Otago communities in perpetuity by providing income for community grants.

Our investment activity is guided by our Statement of Investment Principles and Objectives (SIPO). The SIPO is approved by Trustees and sets out the beliefs, objectives and policies governing decisions about investment of the Trust's assets.

Our three primary investment objectives are:

- to maintain a consistent and sustainable level of distributions which can be financed by the investment of the Fund over the long term; and
- to preserve the real value of capital; and
- to maintain equity between present and future generations with respect to the amounts available for distribution.

Our SIPO also allows for Impact Investments, which have the specific intention of generating a measurable community benefit (social, environmental or other) to the OCT region, alongside some financial return. Trustees will ensure the SIPO continues to align with the vision, mission and values set out in this strategy.

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