



ANNUAL REPORT

Rīpoata-ā-Tau
2025 – 2026

Hutia te rito o te harakeke, kei hea rā te kōmako e kō?

Kī mai ki ahau, he aha te mea nui o te Ao?

Māku e kī atu, he takata, he takata, he takata.

If you were to pluck out the centre of the flax bush, where would the bellbird sing?

If you were to ask me, "What is the most important thing in the world?"

I would reply, "It is people, people, people."

Mihi

E te rau o tītapu, e te rau o huna,
Aku mōtoi kahotea, aku hai kahuraki,
Ka rere ko te reo whakamiha ki a
koutou katoa.

Kai kā mate o te tau, ko haoa rā ki te
kupeka nui o Taramainuku, ko manaakitia e
Pōhutukawa, ko titia ki te puhirere o te Waka
o Raki, hai ākuanei whetūrakitia ai, ko te tai
ao ki a mātou, ko koutou rā te manu pīrau o
Tiki, ko te tai pō ki a koutou. E moe i te moeka
roa, e moe i te moe tē oho. Haere atu rā ki tua
o Paerau.

E te kanohi ora, e pērā ana tāhaku mihi i te
rere o te waitī mai i kā poupuu whenua o uta,
heke iho rā ki kā mānia, ā, tae noa atu rā ki
kā karu papaki o tai. Ka rere taku mihi ki kā
mauka whakahī, ki kā roto whakaika, ki kā
awa e rere ana ki te nuku o te whenua, ā,
ki kā wai whakaora o te waitai.

Kai aku koteo mau kūpeka, kai aku whetū
ārahi, kai kā Rūnaka Papatipu o te akau o
Āraiteuru, Te Rūnaka o Ōtākou, Kāti Huirapa
Rūnaka ki Puketeraki, Te Rūnaka o Moeraki,
Te Rūnaka o Hokonui, nei mātau o te Otago
Community Trust e mihi nei, e mihi nei,
e mihi nei.

Kei aku rau takata, te tini makiu o te iwi,
tēnei te whakarewataka o te Pūroko ā-Tau o
te Otago Community Trust. Kai ōhona rau ko
kā kōrero hāpai o te tātāu hāpori whānui.
Ka whakaatuhia kā mata, kā kanohi o kā tini
hāpori, o kā iwi katoa o te tātāu takiwā, e tipu
haere ana, e pakari haere ana, e āwhina ana
a tētahi ki tētahi. Ko ēnei whatuka takata,
ko ēnei honoka rau, ko te whāriki o te noho
tahi, o te tū tahi hai hāpori whānui, arā, ko te
whakatinana o te kōrero, "he takata, he takata,
he takata".

To the illustrious and distinguished
members of our communities,

Our most precious and cherished,
This is our greeting to you all.

To those who have passed in the year, who
have been gathered into the great net of
Taramainuku, who have been cared for by
Pōhutukawa, who have been fastened to the
chiefly canoe of Raki, soon to be cast into
the sky as stars, we remain in the world of
light, you, the retinue of Tiki, remain in the
long night of death. May you sleep in the long
slumber of death, in the slumber of which
there is no awakening. Go to your place
beyond the hundred heavens.

To the living, my acknowledgements to you
are like the fresh flowing waters from the
inland pillars, that flow through the plains
and out to the crashing tides of the coast.
My acknowledgements to the many proud
mountains, to the lakes whose waters are

used in ritual, to the rivers that flow over the
face of the land to the life-giving waters of
the ocean.

To the great chiefs that stand in the rising of
the tide, to our guiding stars, the Papatipu
Rūnaka o Āraiteuru, Te Rūnaka o Ōtākou, Kāti
Huirapa Rūnaka ki Puketeraki, Te Rūnaka o
Moeraki, Te Rūnaka o Hokonui. This is our
acknowledgement to you.

To our communities, to the many different
people that make up our society, this is
the release of the Otago Community Trust
Annual Report. In its pages are the uplifting
stories of the wider community. It shows
the representatives and faces of the many
different parts of our community, all of the
different nations that reside in our area, their
progress, their development and their support
of one another. These woven relationships,
these many connections of living together
in a community are the embodiment of the
proverb, "it is people, it is people, it is people."

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Make, Share, Repair: Wānaka's Community Workshop

**Wānaka Community Workshop
Trust | \$9,600 | Central Otago**

The Wānaka Community Workshop is a place where people of all ages and backgrounds come together to make things, fix things, and learn from one another. Through woodworking and sewing programmes, after-school and holiday sessions for young people, and volunteer-led community projects, the workshop offers a shared space to work with your hands alongside others.

These are spaces where practical skills are taught, tools are shared, and knowledge passed freely between members. The community connections that form along the way - and the confidence that comes from making something with your own hands - are as much a part of what the workshop offers as anything that leaves the workbench.



Chair & Chief Executive Report

Tēnā koutou katoa,

The 2025–2026 financial year has been one of meaningful progress for Otago Community Trust - a year shaped by listening and the steady work of laying stronger foundations for the future.

Partnership with Mana Whenua

One of the most significant milestones of OCT's year was the signing of a relationship agreement with Otago's three Papatipu Rūnaka - Kāti Huirapa Rūnaka ki Puketeraki, Te Rūnaka o Ōtākou, and Te Rūnanga o Moeraki.

This agreement represents a new chapter in our history. It provides a strong foundation for collaboration and exploring areas of mutual interest. We look forward to the opportunities that lie ahead and the stronger outcomes our relationship agreement will help us achieve together.

Strategy Review

This year has also been defined by renewing our strategy. Last year, we asked Otago communities a simple but important question: he aha te mea nui - what matters most? The response was extraordinary. People gave generously of their time, their whakaaro, and their voices. The insights we gathered have directly informed a renewed vision, mission, and set of values for the Trust, which we are pleased to share on Page 5. Data gathered through that process is also available on our website as a resource for the region.

We know many of the organisations and communities we work with are eager to understand what this means for funding going forward. That work is still underway; updating our funding framework is the next significant step in the process, and we are approaching it carefully and with community input front of mind. We are committed to ensuring that how we work together evolves in a way that is transparent, considered, and genuinely shaped by the communities we serve.

Community Impact

This year, Otago Community Trust approved \$12.99 million across 666 grants. As always, the kaupapa supported ranged in breadth from sport and events, to environmental projects and community developments, support for tamariki and rangatahi, and so much more.

The Tamariki and Rangatahi Strategy entered its fourth year with a record number of Impact Fund initiatives approved. We supported four organisations doing transformative work for young people: Te Hauora Murikauhaka, to establish a counselling service for tamariki in the Balclutha area; Te Hā o Maru, to expand their Te Pōhā programme; Youthline Otago, to develop a sexual violence prevention initiative for rangatahi across Otago; and Netsafe, to pilot a digital safety programme led by young people in their own communities.

Together, these investments reflect our belief that the most powerful change happens when communities - and the young people within them - are trusted to lead.

Investment Performance

The Trust's funds ended the financial year valued at \$329.3 million, with an annual return of 8.79%. While uncertainty remains and global markets remain volatile, our long-term investment approach and relationship with advisers Mercer means we are well placed to make the most of opportunities as they arise.

Board Transitions

At Board level, this year we farewelled trustee Alofa Lale in November - we are grateful for the contribution she made during her tenure with us. We were pleased to welcome new trustee Toni Talijancich in December, and the Board was strengthened further by the re-appointment of Andy Kilsby for his second term.

Following the close of the financial year, the Board welcomed Stacey Honeywill (Kāi Tahu) as Chair and Rebecca Williams as Deputy Chair. The Board looks forward to the leadership and support they will bring to these roles.

Looking Ahead

Strategy remains front of mind as we look to the year ahead. Updating our funding framework will be the priority, and we are committed to doing that well in partnership with communities across Otago. We are particularly excited about what our deepening relationship with mana whenua will bring.

Despite the complexities of the current environment, the generosity of spirit we encountered throughout our community engagement process reminded us of what is possible when we listen well and work together - and we are optimistic for our region.



Kā mihi nui
Andy Kilsby
Jemma Adams

Otago Community Trust – Strategy

Te Rautaki — Te Rakatōpū ā-Hapori ki Ōtākou

During the year, we developed a new strategy informed by extensive engagement with our community. The key elements are outlined below, with the full strategy document and community engagement data available for download on our website.

Our Vision *Tā Mātau Arokanui:*

Empowered People | Thriving Communities | Sustainable Environments

He iwi whai mana | He Hapori Ora | 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

- 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

He tākata, he whenua | People and Place

- 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.

Mana Taurite | Equity of Opportunity

- 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.

Whakapirika | Relationships

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

Pono | Integrity

- 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?

Tauwhirotaka | Stewardship

- 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.

Governance

Tō mātou rōpū

Our Trustees | Ō Mātou Kaitiaki

Otago Community Trust is governed by up to 12 Trustees appointed by the Minister of Finance. Toni Talijancich was appointed in December 2025, alongside the reappointment of Andy Kilsby. Alofa Lale stepped down in November 2025.

Trustees meet monthly to consider grant requests, strategy and governance matters, bringing a broad range of skills, experience and knowledge to guide the Trust's activities.

For the period this Annual Report relates to, Andy Kilsby was our Chair and Barb Long our Deputy Chair. In May 2026 (which falls in our next financial year), Stacey Honeywill was appointed Chair, and Rebecca Williams as Deputy Chair.



Andy Kilsby
Chair /
Central Otago



Barb Long
Deputy Chair /
Greater Dunedin



Alofa Lale
Greater Dunedin



Bridget Tweed
South Otago



Carole Adair
Greater Dunedin



Jeremy Chang
Greater Dunedin



Dr Michael Stevens
Greater Dunedin



Rachel Bird
Greater Dunedin



Rebecca Williams
Central Otago



Robyn McLean
Greater Dunedin



Stacey Honeywill
North Otago



Toni Talijancich
Greater Dunedin

Our Kaupapa 2022-2027 | Ō Mātou Rautaki

Otago Community Trust is a community-owned charitable trust that provides grants to assist community groups and projects that make a significant and positive contribution to Otago communities.

Our Vision



Otago communities are vibrant and resilient, and protective of people, heritage and environment.

Our Values



- We are accessible, transparent and driven to make a difference;
- We are resilient, courageous and act with integrity, respect and prudence, valuing strong relationships;
- We are committed to the principles of Te Tiriti o Waitangi;
- We show leadership, wisdom and empathy.

What We Do:

To achieve our vision, we will:



Funding

Empower communities to realise their potential and goals.



Asset Management

As a trust in perpetuity, balance the interests of current and future generations by preserving capital and maximising granting.



Organisational Effectiveness

Ensure we have effective processes and resources to achieve our purpose.

Our Investments

Ō Mātou Haumi



\$329.2m

Value of the trust funds as at 31 March 2026



8.79%

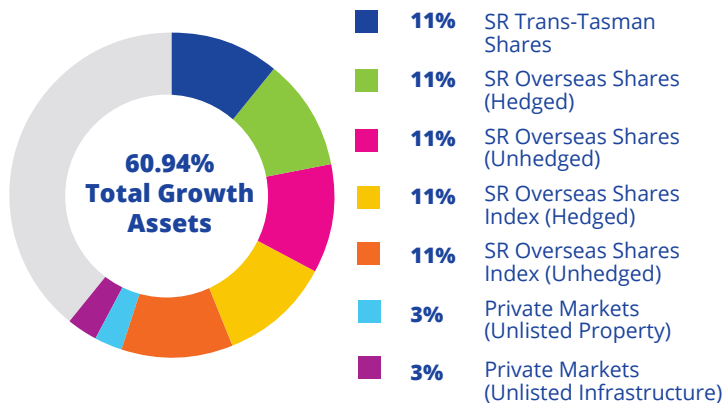
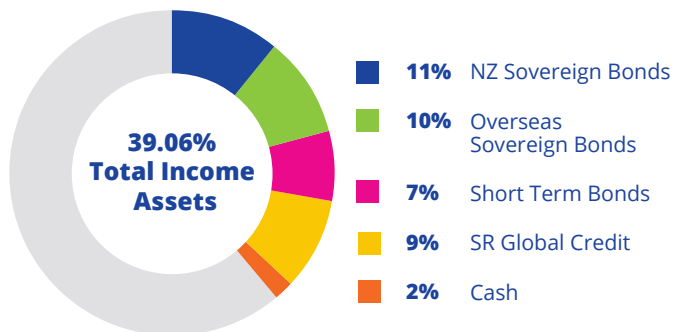
Return on investment as at 31 March 2026



\$243.9m

Funding approved across Otago since inception as at 31 March 2026

Strategic Allocation Of Financial Assets



Global financial markets were volatile for the year ended 31 March 2026, shaped by shifting monetary policy and heightened geopolitical tensions. The MSCI World Index (NZD Hedged) rose 18.0%, up from 7.0% the prior year.

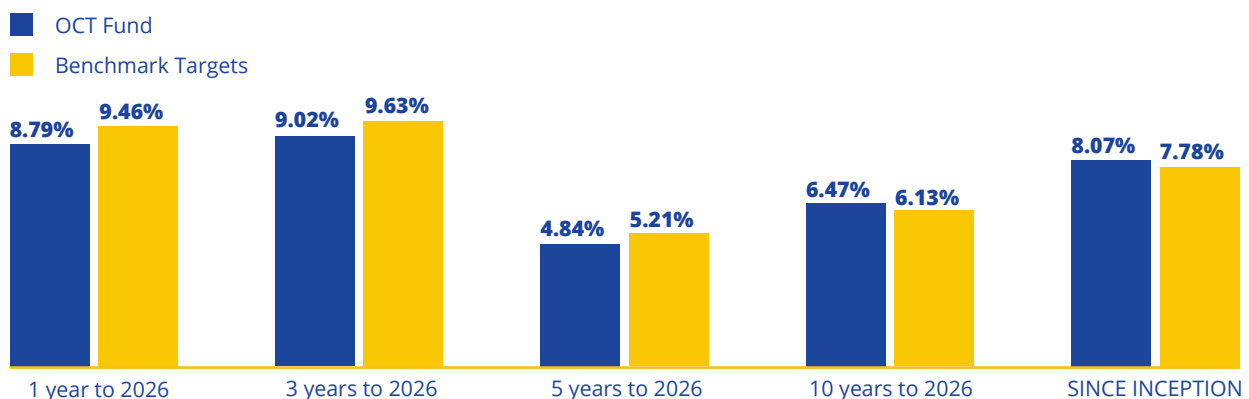
The year opened with U.S. "Liberation Day" tariff announcements, triggering sharp market swings before a 90-day deferral restored confidence. Strong earnings from Nvidia, Amazon, Google, and Meta supported U.S. markets, underpinned by ongoing AI optimism. As trade talks progressed, tariffs proved less damaging to growth and inflation than initially predicted.

Markets fell in March 2026 after U.S. and Israeli strikes on Iran disrupted roughly 20% of global oil and gas flows through the Strait of Hormuz, adding uncertainty to the growth and inflation outlook.

Global bonds returned a modest 2.0% for the year. Expectations of further rate cuts faded as the Middle East conflict escalated and inflation concerns resurfaced. The RBNZ cut rates from 3.5% to 2.25% before pausing amid geopolitical uncertainty. New Zealand bonds gained 3.8%.

New Zealand equities rose 5.9% amid mixed earnings and domestic headwinds, while Australian markets gained 11.7%, led by financials and materials sectors.

Otago Community Trust Annual Returns (Year to 31 March)



Tō Mātou Tahua Pūtea



Total Grants
Approved
2025-26



Total Number of Community Groups Funded



Total Grant Applications Processed

Our grant-making this financial year has continued to be guided by our current four strategic Funding Pillars, each with specific priorities that reflect our commitment to regional development. Through our Funding Sectors - Arts and Culture, Community, Environment and Heritage, Learning, and Sports and Recreation - we provide both small and large grants to support a wide spectrum of valuable community mahi throughout the Otago region.

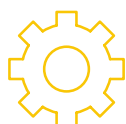
Granting By Funding Pillar



Empowered
Communities
\$2,323,474.00



Improved Health
& Wellbeing
\$5,808,416.00



Increased Access To Opportunities
\$1,587,306.00



Thriving Children &
Young People
\$3,271,132.25



Of grants supported
priority communities.

Granting By Funding Sector



Art & Culture
\$790,362.00



Community
\$5,956,781.00



Heritage
\$329,781.00



Environment
\$243,850.00



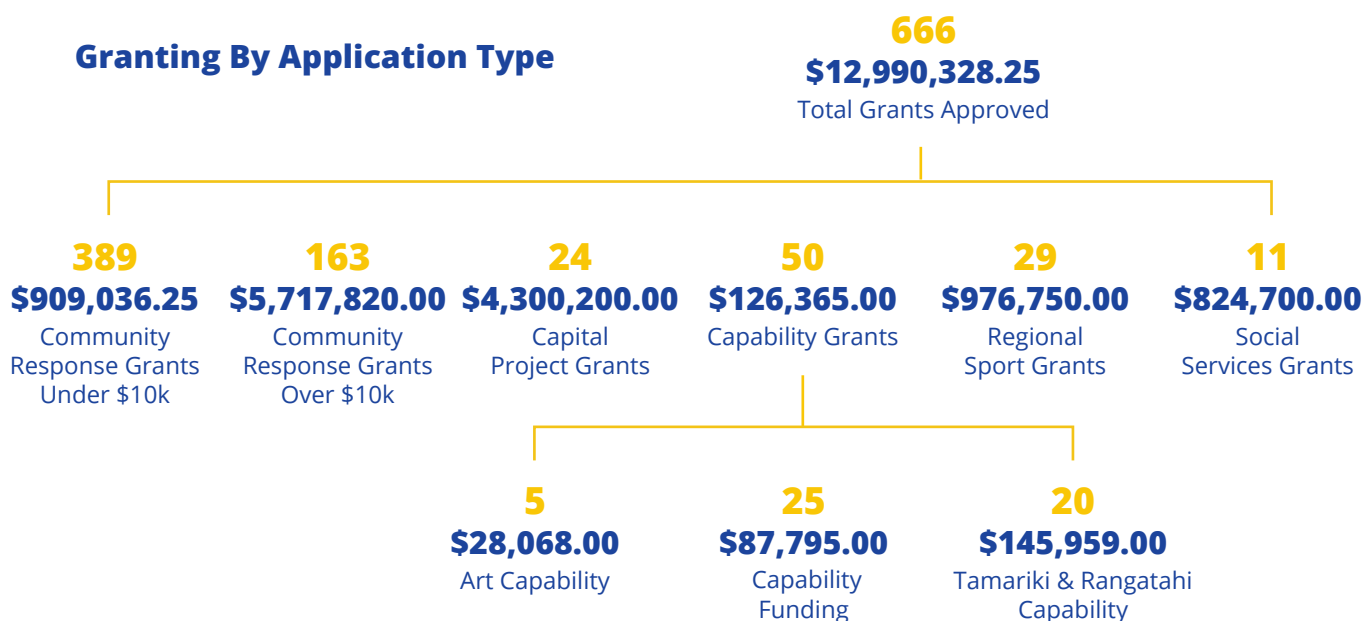
Learning
\$1,340,354.25



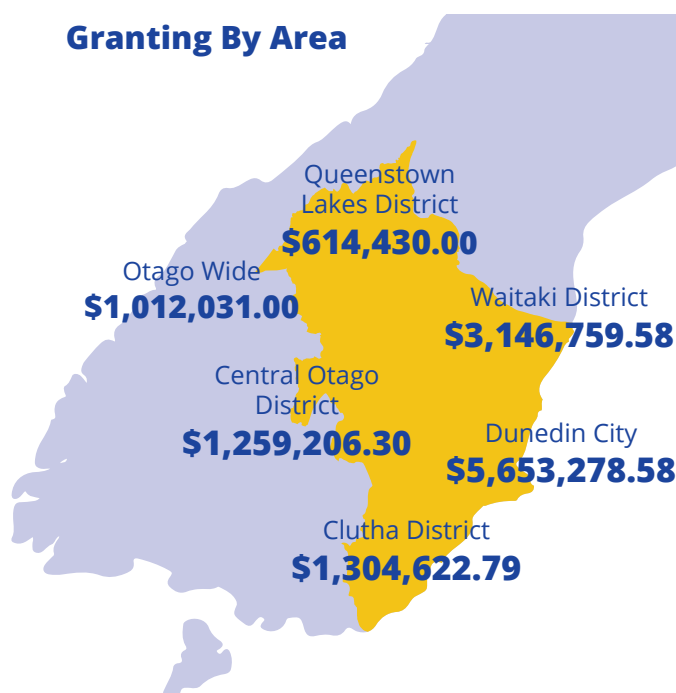
Sports &
Recreation
\$4,329,200.00

For further information on our funding priorities visit:
www.oct.org.nz/about-us/our-strategic-plan

Granting By Application Type



Granting By Area



Meat on the Move: Putting Kai on the Table

Wild Game Recovery Charitable Trust | \$14,173 | South Otago

In the Clutha district, hunters and farmers are turning surplus game meat and livestock into nutritious kai for families who need it most.

Wild Game Recovery Charitable Trust, acting on behalf of local initiative Meat on the Move, has created a direct pathway connecting those with food to give with food banks across South Otago. With funding helping to get the programme off the ground, Meat on the Move aims to donate 5,000 kg of high-quality meat to food banks within its first year - equating to thousands of meals reaching local families.

This project ensures that generosity from the region's rural communities is channelled directly into the hands of those who need it.

The project also doubles as meaningful pest management, ensuring that wild game harvested across the region is put to good use for the community rather than going to waste.



Climate Action

Te Mahi Whakatika i te Āhuaraki

Our Climate Commitment

Otago Community Trust recognises that anthropogenic climate change is a serious and immediate risk to our communities and requires urgent collective action to create positive change for future generations.

In 2024, we adopted our first Climate Action Plan, establishing a clear pathway for reducing our environmental impact while supporting our communities through climate challenges.

Building on this foundation, we developed our Climate Action Plan for 2025-2027. This plan continues our climate journey with science-informed targets and community-focused initiatives and is available on our website.

OCT will be guided by Te Tiriti o Waitangi throughout this journey. We remain committed to supporting a tika (just) and equitable transition across our region, recognising that climate impacts will not be felt equally among our communities.

Our Three Key Focus Areas:

1. Community Support

Through our granting and capability-building funding activities, support communities across Otago to understand and mitigate their climate change impacts and grasp opportunities.

2. Investment Portfolio Management

We aim to reduce emissions from our core operations by 20% by 2030, and we aim to reduce emissions from our investments by 43% by 2030.

For more detail on these targets and baselines please see our Climate Action Plan on our website..

Collective Action

As a signatory to the Funders Climate Commitment, we are working alongside other philanthropic organisations to address climate challenges. This year, we contributed \$25,000 to the Kaupapa of National Significance climate initiative, supporting collaborative climate action at a national level.

Our Climate Action Plan is a living document that will continue to evolve as we make progress and as new science, guidance, and technologies become available. We invite our communities to join us on this vital journey toward a more sustainable future.

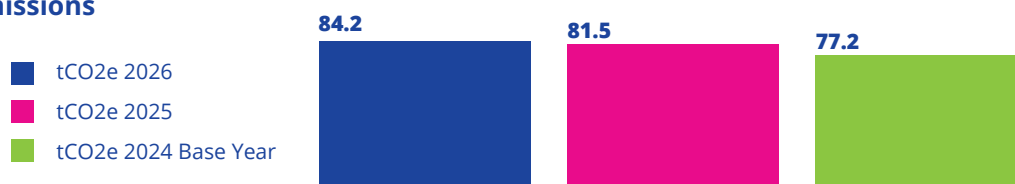
3. Internal Operations

Embed climate responsibility into our culture and ethos, starting with measuring our internal greenhouse gas footprint and setting and achieving targets to reduce emissions and achieve a carbon neutral position.

Our Carbon Footprint

OCT first measured its carbon footprint in 2024, and have done so again in 2026. The bar graph below shows the emissions from this year's core office operations, compared with our 2024 baseline year.

Operational Emissions



Operational emissions have increased by 9% since base year (2024). The team are working on ways to reduce this in line with our target.

A carbon footprint summary will be published on our website later this year.



Learning Under the Sun – A Renewable Future

Papakaio School | \$15,750 | North Otago

Serving its community for well over 150 years, Papakaio School sits at the heart of a broad rural catchment. In 2024, they received the Bronze Enviroschools Award from the Waitaki District Council, recognising their commitment to sustainability and cultural inclusivity. The installation of 77 solar panels was the next milestone on that journey.

Not only do the panels reduce the school's electricity costs and carbon footprint, they're also becoming part of the curriculum. Data from the inverter feeds directly into classroom learning, giving students a live window into how renewable energy works. Tracking output, measuring savings, and turning maths and science into something they can see, measure, and understand as they go about their daily lives. It's a remarkable hands-on teaching tool with real numbers, impact, and relevance to the world students are growing up in.

Whānau have already noticed changes in how their children talk about energy, recycling, and waste at home. For Papakaio School, solar panels are a practical investment in both the present and the future, reducing costs today while modelling the kind of environmental stewardship that will matter long after students have left the classroom.

Tamariki & Rangatahi Strategy

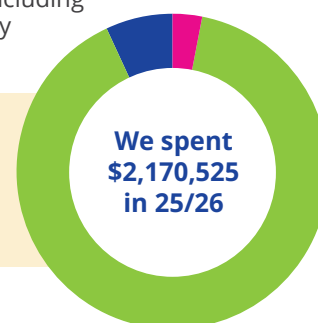
Te Rautaki mō kā Tamariki me kā Rakatahi

Now in its fourth year, the Otago Community Trust's Tamariki & Rangatahi Strategy represents a commitment of up to \$10 million over five years. This investment targets initiatives that support the strategy's core vision: ensuring all young people in Otago feel valued, accepted, and empowered to pursue fulfilled lives.

The initiative focuses specifically on youth from 0 to 24, with strategic priorities including enhancing social equity, fostering participation, and championing initiatives led by rangatahi themselves.

To support this, the Trust established three funds dedicated to enhancing the lives of young people throughout the region:

■ Rangatahi-Led Fund ■ Impact Fund ■ Capability Fund



Impact for Tamariki and Rangatahi Fund

The Impact for Tamariki and Rangatahi Fund offers a small number of high investment grants for projects that aim to create multi-generational positive change for tamariki, rangatahi, and whānau. This fund emphasises building close relationships between the Trust and the Community-Partner recipient organisations to maximise the impact of the investments.

1. Te Hauora Murikauhaka

A \$454,000 grant over three years is supporting the establishment of a sustainable counselling service for children aged 5-13 across the wider Balclutha area. Led by a cluster of 12 schools serving around 1,200 students, the initiative builds on a successful pilot running since 2021, which has already shown measurable improvements in school attendance across all participating schools.

The grant is funding the establishment of an independent trust to run the service outside the education system ensuring more equitable access to mental health support across rural South Otago.

2. Te Hā o Maru

A \$700,000 grant over three years is supporting the expansion of Te Pōhā, a rangatahi leadership programme run by Te Hā o Maru in the Waitaki district. The programme - the first of its kind in the region - connects young people to their cultural identity through mahika kai, te reo Māori, and hands-on environmental work, while remaining aligned to NCEA. This funding is doubling the programme's annual capacity and extending its reach into intermediate and primary schools across Waitaki.

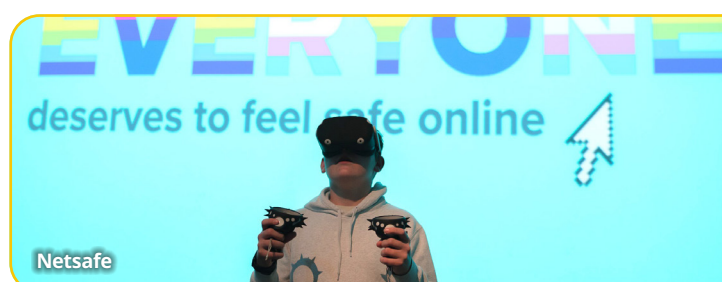


3. Youthline Otago

A \$450,000 grant over three years is supporting Youthline Otago's Sexual Violence Primary Prevention Initiative targeting rangatahi across Otago. The programme addresses a recognised gap in prevention education - particularly for Year 10 and 11 students - taking a comprehensive approach that tackles underlying social norms rather than focusing solely on consent education. A rangatahi advisory group and Community Advisory Group ensure the content remains youth-informed, culturally responsive, and reflective of the region's diversity.

4. Netsafe

A \$350,000 grant over three years is helping to fund Netsafe's Otago Young Digital Leaders Pilot, placing rangatahi at the centre of digital safety solutions across Central Otago, Dunedin, North Otago, and South Otago. Four rōpū are being established across the region, empowering young people to identify local digital challenges and design their own community responses - from educational resources to policy recommendations - with Netsafe facilitating while rangatahi remain the primary decision-makers.



Rangatahi-Led Fund:

Backing the Leaders of Today

When young people are trusted not just to participate, but to lead, extraordinary things happen, and the Rangatahi-Led Fund is proof of that.

Now in its fourth year, the Rangatahi-Led Fund was established with a simple but powerful premise: that the young people who understand their communities best should be the ones deciding how to invest in them. Launched in 2023, this distinctive funding stream places decision-making power directly in the hands of rangatahi aged 16–24, supporting youth-conceived and youth-led projects with grants of up to \$5,000.

At the heart of the fund are four dynamic regional rōpū, representing Ōtepoti/Dunedin, South Otago, North Otago, and Central Otago. Each rōpū works closely with Otago Community Trust to shape the fund's purpose, set its criteria, and make the final call on which projects receive funding. These young leaders engage their communities to spread the word, review applications, and deliberate together to ensure funding reaches the ideas that matter most to their peers.

In 2025, that collective effort resulted in 19 grants distributed across the region!

The impact of the Rangatahi-Led Fund reaches beyond the grants themselves to the rangatahi who are part of each rōpū. These are young people who give their time, bring their ideas, and draw on their knowledge of the communities they love, to make real decisions that create real change for their peers.

Through attending hui, assessing applications, and navigating the responsibilities of governance, they are developing skills that will serve them, and Otago, for decades to come. Rōpū members gain first-hand leadership, critical thinking, collaborative decision-making skills, and a deep understanding of philanthropy.



St Kevin's College



Maheno School



Lawrence Area School

A heartfelt mihi to all our rangatahi rōpū that spearheaded this kaupapa!

2025 Rangatahi-Led Fund Rōpū members

Central Otago

Chloe Murray
Noah Moody
Amelie Sutherland-Harris
Kasey Brooks
Caitlin Shea

Ōtepoti/Dunedin

Sophie Notman
Isabella Miscisco
Zoe McElrea
Meg Threlfall
Abby Golden
Tia Fleming
Charlotte Smith

South Otago

Nancy Turner
Alex Anderson
Jerico Gerida
Hannah Madayag
Ollie Tunnah

Waitaki

Sara Harding
Sophia Sam
Siara Sam
Jacob Yeates
Tessa Wright
Adrianna Dowling
Franz Lauglaug



Upper Clutha Agricultural & Pastoral Society



Mosgiel Scouts



Kākā Point Playground



He Waka Eke Noa Charitable Trust, Ugly Shakespeare Company



Chinese Cultural Festival



Winterstellar Charitable Trust, Victoria Bowman



Ōamaru Victorian Heritage Celebrations



Central Otago Ecological Trust



The Wildlife Hospital



Te Hauora Murikauhaka

Our Community

Tō Mātou Hapori

At the heart of a thriving community lies the collective effort of its rōpū (members).

The following pages highlight just some of the mahi undertaken by people in the Otago region, and the impact they are making under our four pillars: Empowered Communities, Improved Health & Wellbeing, Increased Access to Opportunities, and Thriving Children & Young People.

Schools Coaching and Youth Development Programme

North Otago Rugby Football Union Inc
\$25,000 | North Otago

Across the Waitaki District, rugby is bringing tamariki and rangatahi together, and North Otago Rugby Football Union (NORFU) is making sure every young person has a place in the game.

Through junior coaching clinics, school partnerships, and mentorship programmes, NORFU are building meaningful pathways that connect grassroots participation all the way through to senior levels. Better facilities, coaching resources, and equipment are helping ensure that geography or background is no barrier to pulling on a jersey.

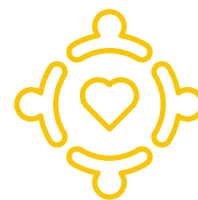
Guided by six core values - Inclusion, Fun, Excellence, Integrity, Bravery, and Respect - NORFU's junior programme is as much about developing good people as it is good players. This shows up in how coaches engage with young players and how clubs welcome new families.

With a goal of 15% participation growth by 2030, NORFU is investing in the next generation of North Otago - on and off the field.



Empowered Communities

Hapori whaikaha



Where Streets Become Galleries - Walls Worth Stopping For

**South Dunedin Community Network Inc on behalf of
South Dunedin Street Art Trail | \$29,000 | Greater Dunedin**



South Dunedin Community Network Inc

South Dunedin has been getting more colourful by the day. Along King Edward Street and across the wider suburb, blank walls have been transformed into large-scale works of art - vibrant, thought-provoking murals that reflect the history, ecology, and identity of the community that lives there. Organised by the South Dunedin Street Art Trail, a dedicated volunteer group, The EBB & FLOW Street Art Festival brought together local and national street artists to create eight new works across eight different walls. Artists were matched with walls, designs were developed with landlords and tenants, and the process was open to the public from the first brushstroke to the last.

Artist talks, workshops, and a youth street art programme gave community members the chance to engage directly with the artists and the craft - turning the festival into something far more than a series of finished walls.

The results speak for themselves. Community members have said that the street art trail and festival has dramatically changed the look and feel of the suburb, building a genuine sense of pride and belonging among residents. Works representing Māori, Pasifika, rangatahi, and the disability community have added to a streetscape where, as one observer put it, everyone is celebrated.

Consider Yourself at Home - 70 Years on the Stage

**Musical Theatre Ōamaru Inc
\$8,900 | North Otago**

Musical Theatre Ōamaru has been staging productions at the Ōamaru Opera House for seven decades, bringing Broadway and West End musicals, light opera, and theatre restaurant experiences to the Waitaki District. Their 2025 major production of *Oliver!* was another chapter in that long story, and a memorable one at that.

Based on Charles Dickens' *Oliver Twist* and packed with some of the most recognisable songs in musical theatre, the show drew together a large cast, orchestra, and backstage crew for months of shared rehearsal and problem-solving, ending in a run of public performances. For many involved, that process is as meaningful as the nights on stage: the friendships formed and the confidence built along the way.

Musical Theatre Ōamaru has always opened its doors to anyone with a passion for the art form.



Musical Theatre Ōamaru Inc

Its strong junior division means that for many young people in the district, this is where a lifelong love of performance begins. And for audiences, there's something particularly special about watching people you know take the stage, transformed under the lights of a beautiful historic theatre.

Improved Health & Wellbeing

Ka pakari ake te oraka



More than a Race - Challenge Wānaka Shows Up

Challenge Wānaka Sports Trust | \$12,500 | Queenstown Lakes

February 2026 marked a milestone for a beloved sporting event: the 20th anniversary of Challenge Wānaka. What began in 2007 as a triathlon on the shores of Lake Wānaka has grown into a three-day festival that draws over 2,800 competitors from across Aotearoa and around the world.

What makes Challenge Wānaka truly special is who those competitors are. Of the 2,800+ participants, around 1,800 are children or individuals with a physical or intellectual disability - a reflection of the festival's deep commitment to inclusive, community-centred sport.

The Junior Challenge, embedded in the local primary school curriculum, gives tamariki the rare experience of competing in a large-scale triathlon event. For many, it's their first encounter with organised sport at this level, and the goal is simple: make it positive, make it memorable, and plant the seed of an active life. The Adaptive Challenge extends that same spirit to participants with physical or intellectual disabilities.

The Saturday middle distance triathlon continues to attract returning athletes alongside first-timers, with relay options ensuring that friends, whānau, and colleagues can cross the finish line together.

Twenty years on, Challenge Wānaka remains proudly part of the community, shaped by local schools and volunteers, while welcoming the world to one of Aotearoa's most spectacular settings.



Challenge Wānaka Sports Trust, Lennon Bright

Creating Space to Breathe, One Bead at a Time

The CanInspire Charitable Trust | \$3,000 | Otago

For people navigating illness, loss, or trauma, the simple act of making something beautiful can be quietly transformative. That's the heart of CanBead Otago, a free creative therapy programme that brings jewellery-making workshops to some of the community's most vulnerable members.

Run by the CanInspire Charitable Trust, CanBead works alongside trusted organisations including the Cancer Society, Hospice, Able Minds, and the MS Society to reach people who might otherwise feel isolated in their struggles. Rather than operating from a single venue, the programme meets people in the spaces of organisations they trust, removing additional barriers for those with limited energy or mobility.

Over 44 workshops held across Dunedin, Alexandra, Wānaka, and Ōamaru, participants learn to create necklaces, bracelets, earrings, and seasonal crafts in relaxed, supportive two-hour sessions facilitated by experienced tutors. The shared table becomes a place of connection, where conversation flows naturally alongside the creative work.

First-time participants receive a full kitbag of professional tools and materials to take home, meaning the workshop doesn't end when they leave. The skills and resources travel with them, offering a personal coping tool accessible on hard days, quiet evenings, or whenever distraction or calm is needed.

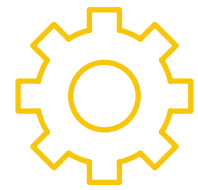
CanBead serves people living with illness, trauma, loss, and disability - proof that healing can happen in many forms, and that creativity and community are powerful medicines.



The CanInspire Charitable Trust

Increased Access To Opportunities

Ka nui ake te whai wāhi



Te Puna Mahara: Cromwell Memorial Events Centre Opens Its Doors

Central Otago District Council | \$200,000 | Central Otago

Nestled on the edge of Lake Dunstan, a long-anticipated community vision has now been brought to life. The new Te Puna Mahara - Cromwell Memorial Events Centre stands as a testament to the rich and layered heritage of Cromwell and Central Otago.



Central Otago District Council

The new facility opened in July 2026, offering a modern, contemporary space that proudly respects its memorial status while offering a warm and welcoming environment for the whole community.

Designed to meet the needs of residents and visitors now and for generations to come, inside visitors can take an immersive journey through the region. From the history of Māori influence in the area to the Mahika Kai Digital Interface, the museum weaves together stories of Chinese miners and settlers, gold rush history, and the agricultural traditions that shaped the landscape. A mini theatre, interactive rock and Moa displays, and hands-on children's activities ensure there is something for every generation.

Outside, carefully considered landscaping include garden areas, feature rocks, and landscape walls. The result is a welcoming, accessible space that honours Cromwell's roots while embracing a contemporary vision for the future.

The gifted name Te Puna Mahara can be translated as a repository of memories or a centre of remembrance. It speaks to memory, connection, and gathering - everything this space is designed for.

A Space to Learn, Connect and Grow – Ōamaru Pacific Island Trust's New Learning Hub

**Ōamaru Pacific Island Trust
\$75,000 | North Otago**

The Ōamaru Pacific Island Trust (OPIT) has been serving Pacific and wider Waitaki communities since its establishment in 2024, building on decades of work by the Ōamaru Pacific Island Community Group before it. Delivering health, cultural, educational, and workforce development programmes, the Trust has grown steadily, and its original premises could no longer keep pace with demand.

In April 2025, they transformed a neighbouring building into a dedicated community Learning Hub. The fitout includes a Digi-Hub providing computer and printer access for those without devices at home, a culturally responsive Fale meeting room, smaller breakout spaces, workshop equipment, furniture, and the finishing touches that make a space genuinely welcoming.



Ōamaru Pacific Island Trust

The Hub operates Monday to Friday, with evening and weekend availability for community groups, businesses, and other organisations. OPIT is delivering health, cultural, exercise, and workforce development programmes from the space, with a new Level Three Digital Tech Certificate in Manufacturing launched for Pacific learners.

For a community with big aspirations and growing needs, this Hub is far more than a building. It is a foundation for the future.

Thriving Children & Young People

Ka ora rawa atu ngā tamariki me ngā rangatahi



Alexandra's Giant Toy Box – Building Futures Through Play

Alexandra Toy Library
\$1,500 | Central Otago

Since 1991, the Alexandra Toy Library has been bringing the joy of play to Central Otago families.

The Toy Library premise is simple - families have an annual membership and borrow toys, returning them when their children are ready for something new. For families who find it difficult to keep pace with children's changing needs, the library provides access to a rotating range of quality toys that support cognitive, social, and emotional development. Problem-solving, confidence, resilience - these are skills built through play, and the toy library helps ensure they're accessible to all.

There's an environmental impact too - a toy borrowed, loved, and returned ready for the next child has a far longer lifespan than one bought new. By keeping toys circulating through the community, the library embodies a genuinely sustainable model of consumption, extending the useful life of every item in its collection and reducing waste by making the most of the resources already in existence.



Alexandra Toy Library

Currently serving 81 member families and 122 registered children, the library's reach extends further still. Home-based carers and educators borrow resources for the children in their care and grandparents take out casual memberships over summer when grandchildren come to stay.

After 34 years, the Alexandra Toy Library is still delivering joy, one borrowed toy at a time.

The Playground Stirling Built - A Place to Play

Stirling School | \$30,000 | South Otago

Earlier this year the tamariki of Stirling School ran out to their brand new playground for the very first time. For a school that had been without one, it was a moment worth celebrating.



Stirling School

Stirling School's story is one of remarkable growth. In 2022, the rural South Otago school had two classrooms and around 40 students. Today, with a fourth classroom newly opened, the school has more than doubled in just three years.

Through all of that growth, the school had no playground of its own. Previous equipment had been decommissioned on safety grounds, and rather than replace it the school made the thoughtful decision to transform the area into a native planting space. It's now a developing forest zone that supports nature play and protects an environmentally sensitive gully on the school grounds.

This new playground fills what had become a genuine gap. Teachers are already weaving use of the equipment into daily routines, recognising the well-established link between physical activity and learning readiness.

Beyond the school day, the playground is open to the wider Stirling community - families, preschoolers, and neighbours.

Grants List

Kā Takuhe

Central Otago District

Alexandra and Districts Youth Trust	\$32,972
Alexandra Blossom Festival Inc	\$6,000
Alexandra Community House	\$5,000
Alexandra Musical Society Inc	\$5,000
Alexandra Primary School	\$2,100
Alexandra Toy Library	\$1,500
Central Otago A & P Association	\$4,300
Central Otago Budgeting Services Inc	\$4,000
Central Otago District Arts Trust	\$5,000
Central Otago District Council	\$200,000
Central Otago District Council - Rural Travel Fund	\$10,000
Central Otago Ecological Trust	\$3,000
Central Otago Friendship Network	\$5,000
Central Otago Group Riding for the Disabled Association	\$16,000
Central Otago Heritage Trust	\$4,500
Central Otago Hockey Assn	\$15,000
Central Otago Regional Choir	\$2,500
Central Otago Rural Education Activities Programme (REAP)	\$12,500
Central Otago Whitewater Inc	\$3,000
Chamber Music at the World's Edge Foundation	\$5,000
Clyde Playcentre	\$7,000
Clyde Primary School	\$4,950
Cromwell and Districts Promotion Group Inc	\$25,000
Cromwell College	\$600
Cromwell Combined Society of Arts and Crafts Inc	\$6,000
Cromwell Kids Fun Club Inc	\$1,262
Cromwell Primary School	\$5,567
Cromwell Resource Centre Trust	\$20,000
Cromwell Scout Group	\$10,000
Cromwell Youth Trust	\$44,000
Dunstan Arm Rowing Club Inc	\$7,300
Dunstan Community Whare Trust	\$76,000
Dunstan High School	\$625
Goldfields Primary School	\$910

Grab the Reins	\$1,000
Journeys Charitable Trust	\$14,000
Life Education Trust Heartland Otago Southland	\$13,000
Mainland South BMX Assn Inc	\$18,000
Millers Flat School	\$700
Molyneux Turf Incorporated	\$375,000
NZ Curling Assn Inc	\$19,440
NZ Rural Games Trust	\$2,500
Old Cromwell Incorporated	\$2,600
Ōmakau Bowling Club	\$10,500
Poolburn School	\$2,550
Probus 14 Alexandra	\$1,000
Radio Charity	\$3,500
Ranfurly Bowling Club Inc	\$3,000
Roxburgh Area School	\$10,065
Roxburgh Golf Club Inc	\$11,794
Southern Ice Hockey League	\$2,000
Teviot Prospects	\$150,000
The Bannockburn Community Centre Inc	\$8,000
The Tarras Community Church Charitable Trust	\$11,500
The Terrace School	\$3,471.30
Up-Cycles Charitable Trust	\$8,000
Upper Clutha Hockey Club Inc	\$1,000
Upper Taieri Wai Incorporated	\$5,000
Uruuruwhenua Health Incorporated	\$20,000
Winterstellar Charitable Trust	\$10,000
Central Otago District Total	\$1,259,206.30

Clutha District

Balclutha Primary School	\$455,550
Catlins Historical Society Inc	\$12,000
Catlins Senior Citizens Club Incorporated	\$1,000
Clutha Country Music Club	\$1,000
Clutha District Council - Aspiring Leaders	\$2,000
Clutha District Council - Rural Travel Fund	\$10,000
Clutha Recreation Centre Inc	\$5,000
Clutha Valley Primary School	\$900
Kākā Point Community Group Inc	\$120,000
Kākā Point Surf Life Saving Club	\$450,000

Lawrence Area School	\$4,049.50
Milton Coronation Hall Society Inc.	\$2,600
Milton Elder Care Trust	\$7,000
Mount Zion Church	\$4,500
Project Bruce	\$1,548
Rosebank Primary School	\$880
South Otago Agricultural & Pastoral Soc	\$5,000
South Otago Athletic Club	\$6,000
South Otago High School	\$450
South Otago Historical Soc Inc	\$10,000
Stirling School	\$30,000
Taieri Mouth Amenities Soc	\$10,000
The Bruce Museum Trust	\$3,000
The Catlins Area School	\$4,348.29
The Clutha Budget Advisory Service	\$9,990
The Samoan Congregational Christian Church Trust Board (Balclutha)	\$3,000
Toko Rugby Football Club Incorporated	\$50,000
Tokomairiro Community Recreation Centre	\$5,000
Tokomairiro High School	\$75,150
Warepa School	\$484
Wild Game Recovery Charitable Trust	\$14,173
Clutha District Total	\$1,304,622.79

Dunedin City

Abbotsford School	\$12,641
Able - Southern Families Support	\$64,975
ADL	\$7,117
Age Concern Otago Inc	\$68,250
Alzheimers Disease and Related Disorders Society (ADARDS) Otago Incorporated	\$15,000
Andersons Bay Community Kindergarten Inc	\$2,596
Andersons Bay School	\$30,150
Andersons Bay Sea Scouts	\$12,000
Anglican Family Care	\$92,250
Aroha Ki Te Tamariki	\$20,000
Arthur Street School	\$600
Arts On Tour NZ	\$20,000
Athletics Otago Inc	\$28,400
Athletics Taieri Incorporated	\$500

Aukaha (1997) Ltd	\$56,550
Balmacewen Intermediate School	\$1,180
Basketball Otago Inc	\$60,000
Bathgate Park School	\$3,380
Bayfield High School	\$1,500
BIAS (Brockville) Charitable Trust	\$55,000
Big Rock Primary School	\$8,560
Blue Oyster Arts Trust	\$6,975
Brighton Gala Day	\$1,000
Brighton Surf Life Saving Club (Dunedin)	\$3,800
Broad Bay School	\$1,957
Brockville School	\$29,350
Business South Inc	\$90,000
Catholic Social Services	\$68,250
Cavalcade Host Town Committee Inc	\$7,000
Caversham Baptist Church	\$8,000
Chisholm Park Golf Club Inc	\$21,500
Christ Loves All Nations	\$3,000
Citizens Advice Bureau Dunedin Incorporated	\$10,000
Concord School	\$480
Cosy Homes Charitable Trust	\$351,530
Dhargyey Buddhist Centre Inc	\$50,000
Disability Information Service Inc T/A Livingwell Disability Resource Centre	\$28,850
Diving Ōtākou	\$15,000
Dunedin (NZ) Masters Games Trust	\$90,000
Dunedin Bird Club Inc	\$650
Dunedin Budget Advisory Service	\$6,000
Dunedin Choral Society	\$9,000
Dunedin Christmas Charitable trust	\$5,000
Dunedin City Council - Aspiring Leaders	\$2,250
Dunedin City Council - Chinese Cultural Week	\$9,000
Dunedin City Council - Puaka Matariki Celebrations	\$15,000
Dunedin City Jazz Orchestra Inc	\$1,632
Dunedin Clay Target Club Inc	\$10,000
Dunedin Community Care Trust	\$450
Dunedin Community House Trust Inc	\$1,089
Dunedin Community Mediation Trust	\$2,500
Dunedin Curtain Bank Trust	\$16,000
Dunedin Dragons Powerchair Football Club Ltd	\$10,000

Dunedin Edinburgh Sister City Society Inc	\$4,000	Heart Kids New Zealand Inc - Otago	\$2,595
Dunedin Friend - Link Trust	\$5,500	Holy Name Church	\$13,500
Dunedin Fringe Arts Trust	\$88,000	International Festival Environment Science Technology Dun NZ Inc	\$15,000
Dunedin Gasworks Museum Trust	\$12,000	John McGlashan College	\$8,000
Dunedin Group Riding for the Disabled Assn Inc	\$26,173	Just Atelier Trust	\$15,000
Dunedin Ice Hockey Assn Inc	\$2,240	K9 Medical Detection NZ	\$10,000
Dunedin Ice Skating Club Inc	\$15,000	Kaikorai Junior Cricket Club Inc	\$1,000
Dunedin Indian Association	\$7,350	Kaikorai Primary School	\$1,400
Dunedin Midwinter Celebrations Trust	\$25,000	Kaikorai Valley College	\$2,560
Dunedin North Intermediate School	\$6,145	Karitane School	\$1,131
Dunedin Pakistan Society Inc	\$10,000	Kāti Huirapa Rūnaka ki Puketeraki	\$2,300
Dunedin Philippine Club Inc	\$5,000	Kelsey Yaralla Kindergarten	\$2,500
Dunedin Poultry Pigeon & Cage Bird Club	\$2,717	Kings High School	\$3,640
Dunedin Punjabi Association	\$1,500	Liberton Christian School	\$220
Dunedin Returned Services Choir	\$925	Life Education Trust Coastal Otago	\$15,000
Dunedin Revival Centre Tongan Assembly of God	\$2,055	Life Matters Suicide Prevention Trust	\$5,000
Dunedin Rudolf Steiner School	\$2,826.58	Little Sisters of the Poor Trust board Limited	\$144,000
Dunedin Rugby Football Club Inc	\$9,524	Logan Park High School	\$2,475
Dunedin Santa Parade Trust	\$15,000	Macandrew Bay Playcentre	\$15,000
Dunedin Secondary Schools Partnership Charitable Trust	\$5,000	Macandrew Bay School	\$250
Dunedin Tai Chi Club Inc	\$3,840	Māori Hill School	\$370
Dunedin Wildlife Trust	\$20,000	Methodist Mission Southern	\$78,750
Dunedin Writers and Readers Festival	\$16,600	Metonymic Trust	\$2,785
East Otago Musical Theatre Inc	\$5,300	Moana Gow Pool Trust	\$9,674
East Otago Riding for the Disabled Association Incorporated	\$10,000	Mosgiel Ballet Society Inc	\$1,500
East Otago Smallbore Rifle Assn	\$1,200	Mosgiel Piping and Dancing Society	\$2,000
Elmgrove School	\$970	Mosgiel Scout Group	\$8,000
Enabling Love New Zealand	\$1,220	Music4Us Puoro Mō Taatou Music Education Trust	\$4,000
Fairfield School	\$1,390	Musical Theatre Dunedin Inc	\$15,700
Friends of Burns Reserve Trust	\$1,300	Musselburgh School	\$26,500
Friends of the Globe Theatre Inc	\$19,100	North End Rowing Club	\$38,000
George Street Normal School	\$165	Northern Junior Association Football Club Inc	\$2,000
Golf Otago Inc	\$30,000	NZ International Science Festival Inc	\$110,000
Greater Green Island Community Network Charitable Trust	\$49,950	OneCoast Incorporated	\$4,000
Green Island Rugby Football Club Incorporated	\$17,000	Orange Sky New Zealand Limited	\$10,000
Green Island School	\$4,690	Otago Academy of Sport Charitable Trust	\$35,000
He Waka Kotuia Trust	\$50,000	Otago Accommodation Trust	\$10,000
Hearing Association Dunedin Branch Inc	\$5,000	Otago Art Society Inc	\$3,620
		Otago Badminton Assn Inc	\$16,500
		Otago Boys High School	\$6,610
		Otago Bridge Club	\$15,000
		Otago Chess Club Inc.	\$1,000

Otago Chinese Professionals Association Incorporated	\$750	Port Chalmers Seafood Festival Incorporated	\$15,000
Otago Cricket Assn Inc	\$135,500	Portobello Bowling Club Incorporated	\$3,000
Otago Festival of the Arts Trust	\$187,553	Portobello Coronation Hall Society Inc.	\$30,000
Otago Fish & Game Council	\$2,362	Portobello School	\$5,000
Otago Gang Show - Scout Assn of NZ	\$15,500	Portobello Volunteer Fire Brigade	\$30,000
Otago Girls' High School	\$3,915	Pregnancy Help Inc Dunedin Branch	\$9,000
Otago Hockey Assn (1990) Inc	\$35,000	Presbyterian Support Otago	\$93,770
Otago Islanders Sport Trust	\$4,000	Prisoner Aid and Rehabilitation Society - Otago (PARS)	\$12,500
Otago Medical Research Foundation Inc	\$70,000	Pukehiki Hall Soc Inc	\$20,000
Otago Neighbourhood Support Charitable Trust	\$7,500	Pūrākaunui Primary School	\$1,150
Otago Polytechnic - Pacific Island Scholarships	\$10,000	Queens High School	\$61,500
Otago Rowing Association Inc	\$27,500	Reid Park Kindergarten	\$4,000
Otago Rowing Club	\$4,500	Rotary Club of Taieri Charitable Trust	\$33,600
Otago Rugby Football Union Inc	\$60,000	Royal New Zealand Pipe Band Assn - Otago Centre	\$2,760
Otago Rugby League Inc	\$30,000	Royal New Zealand Plunket Trust	\$21,030
Otago Secondary Schools Sports Ass Inc	\$30,000	Saddle Hill Foundation Trust	\$35,000
Otago Secondary Schools Sports Assn	\$8,055	Samoaan Advisory Council	\$4,000
Otago Society for Music Education, operating as Music Education Otago	\$1,200	Save the Otago Peninsula (STOP) Society Inc	\$25,000
Otago Softball Assn Inc	\$10,000	Shakti Woman's Refuge Trust	\$6,200
Otago Sports Car Club Inc	\$20,000	Silver Peaks Country Music Club Inc	\$2,500
Otago Table Tennis Assn Inc	\$5,000	Silverstream South Primary School	\$960
Otago Tertiary Chaplaincy Trust Board	\$2,000	Skeggs Foundation	\$42,800
Otago Touch Assn Inc	\$40,000	South Dunedin Community Network Inc	\$48,273
Otago Tramping and Mountaineering Club	\$5,000	South Pacific Rugby League and Sports Club	\$5,000
Otago University Rowing Club Inc	\$10,000	Southern Filmmakers Collective	\$1,000
Otago University Students' Assn Inc	\$2,500	Southern Football	\$85,300
Otago Vintage Machinery Club Inc	\$2,600	Southern Heritage Trust	\$3,000
Otago Youth Wellness Trust	\$168,432	Southern Youth Development	\$94,500
Ōtākou Māori Womens Welfare League (Branch)	\$1,800	Special Olympics Otago Trust	\$18,975
Our Food Network Dunedin (OFN) Incorporated Society	\$9,210	Spiritual Assembly Of The Bahai's Of Dunedin City	\$3,700
OUSA - The Peace Club	\$1,500	Sport Otago	\$175,750
Outram School	\$7,500	Sporting Chance c/- Sport Otago	\$25,000
Pacific Trust Otago	\$25,000	Squash Otago Inc	\$25,000
Pakistan Association of Otago Inc	\$11,500	St Bernadettes School	\$1,300
Parafed Otago	\$25,000	St Brigids School	\$2,200
Pine Hill School	\$10,340	St Clair Golf Club Inc	\$20,000
Port Chalmers School	\$600	St Clair School	\$1,360
		St Marys School - Mosgiel	\$600
		St Pauls Cathedral	\$70,000

Stage South Charitable Trust	\$13,672
Stopping Violence Dunedin Charitable Trust	\$30,000
SuperGrans Dunedin Charitable Trust	\$5,000
Swing Riot Dunedin Inc	\$4,000
Tahuna Normal Intermediate School	\$25,905
Taieri Age Connect	\$5,520
Taieri Blokes Shed Society Inc	\$4,600
Taieri College	\$5,290
Taieri Musical Society Inc	\$25,000
Taieri Network	\$3,500
Taieri Parents Centre Inc	\$15,000
Tainui School	\$1,265
Tamariki Together	\$4,347
Te Hou Ora Whānau Services Limited	\$94,000
Te Kupeka Umaka Māori ki Āraiteuru Inc (KUMA)	\$5,000
Te Mana Ahua Ake Charitable Trust	\$55,840
Tennis Otago Inc	\$21,030
The Brain Injury Assn (Otago) Inc	\$5,000
The Connections Education and Development Trust	\$5,200
The Landscape Connections Trust	\$40,000
The Methodist Church Of New Zealand Te Haahi Weteriana O Aotearoa Dunedin Methodist Parish	\$6,900
The Nest Collective NZ Charitable Trust	\$3,500
The Pinc and Steel Cancer Rehabilitation Foundation	\$3,000
The Valley Project	\$25,000
Trinity Catholic College	\$15,661
University of Otago Rugby Incorporated	\$2,000
Volleyball Otago	\$20,000
Volunteer South/ Kaitiāo o te Taitonga	\$30,000
Waikouaiti District Museum Soc Inc	\$2,581
Waikouaiti Golf Club Inc.	\$9,600
Waikouaiti School	\$2,810
Waitati School	\$300
Wakari Art Group Inc	\$800
Wakari Cubs & Scout Group - Scout Assn of NZ	\$2,250
Wakari School	\$990
Warrington Primary School	\$10,000
Wildlife Hospital Trust	\$7,000

WOW! Productions Trust	\$10,500
Youthline Otago Inc	\$515,000
Zone 5 - Musical Theatre NZ Inc.	\$4,000

Dunedin City Total \$5,653,278.58

Otago Wide

Anxiety New Zealand Trust	\$5,000
Aphasia New Zealand (AphasiaNZ) Charitable Trust	\$5,000
Baroque Music Community and Educational Trust of New Zealand	\$5,400
Blue Light Ventures Inc	\$3,051
Catalytic Foundation	\$2,500
CCS Disability Action Services Ltd	\$28,000
Chamber Music New Zealand Trust	\$11,800
Choirs Aotearoa NZ Trust	\$5,000
Community Colleges NZ Ltd	\$2,600
Daily Encourager Trust	\$1,500
Epilepsy Association of New Zealand Inc	\$5,000
Gymnastics New Zealand	\$6,200
Hauora Taiwhenua Rural Health Network	\$18,000
He Waka Eke Noa Charitable Trust	\$6,600
Hockey New Zealand Inc	\$20,000
Ice Speed Skating New Zealand	\$2,800
Indian Ink Trust	\$5,500
Inspiring Communities Trust	\$4,080
Institute of Directors in New Zealand Inc	\$7,600
Kenzie's Gift Charitable Trust	\$3,000
Kidney Health New Zealand Incorporated	\$4,500
Louise Perkins Foundation t/a Sweet Louise	\$3,000
Netball South Zone Inc	\$54,000
Netsafe Incorporated	\$350,000
New Zealand Choral Federation Inc	\$8,000
New Zealand Opera Limited	\$2,000
NZ Continence Assn Inc T/A Continence NZ	\$3,000
One Mother to Another	\$5,000
Outward Bound Trust of New Zealand	\$145,000
Play It Strange Trust	\$14,000
Presbyterian Support Northern T/A Lifeline	\$10,000
Red Frogs NZ	\$5,000

Rekindle Charitable Trust	\$1,500	Mt Aspiring College	\$3,660
Road Safety Education Limited	\$8,500	NZ Mountain Film Festival Charitable Trust	\$5,000
Rockquest Charitable Trust	\$9,000	One New Zealand	\$20,000
Royal New Zealand Ballet	\$14,000	Onstage Wānaka Society Incorporated	\$15,000
Salvation Army New Zealand	\$45,000	Path Wānaka Ara ki Wānaka Incorporated	\$16,800
Shakespeare Globe Centre New Zealand	\$4,000	Pisa Alpine Charitable Trust	\$31,000
Show Me Shorts Film Festival Trust	\$4,800	Predator Free Wānaka	\$10,000
Southern Cancer Society Trust	\$15,000	QLDC - Rural Travel Fund	\$7,500
Southern Cochlear Implant Programme (SCIP)	\$1,000	QLDC - Upper Clutha Libraries	\$5,000
SPELD NZ	\$10,500	Snow Sports NZ Inc	\$40,000
TalkLink Trust	\$5,000	Southern Lakes Arts Festival Trust	\$5,000
Tangata Whenua Community and Voluntary Sector Research Centre Inc	\$8,000	Tititea Performing Arts Trust	\$2,500
Te Hā Ora the Asthma and Respiratory Foundation Charitable Trust	\$10,000	Upper Clutha Agricultural & Pastoral Society	\$4,590
The Boys' Brigade in NZ Inc	\$17,000	Upper Clutha History Society Incorporated	\$9,000
The CanInspire Charitable Trust	\$3,000	Upper Clutha Presbyterian Parish	\$200,000
The Girl Guides Association New Zealand Inc	\$12,500	WAI Wānaka	\$28,800
The National Foundation for the Deaf & Hard of Hearing Manatapu Incorporated	\$7,500	Wānaka Arts Society	\$3,000
The Order of St John South Island Region Trust Board	\$50,000	Wānaka Community Workshop Trust	\$13,935
The Student Volunteer Army Foundation	\$6,200	Wānaka Musicians Incorporated	\$5,000
The UpsideDowns Education Trust	\$2,400	Wānaka Preschool Early Childhood Centre	\$50,000
Wellington Community Fund	\$25,000	Wānaka Primary School	\$2,340
Otago Wide Total	\$1,012,031	Wānaka Riding for the Disabled Inc (RDA)	\$3,418
		Wānaka Search and Rescue Inc	\$20,000
		Wānaka Snowsports Club	\$5,600
		Wānaka Tennis Club Inc	\$20,000
		Wānaka Wastebusters	\$5,000
		Queenstown-Lakes District Total	\$614,430
		Waitaki District	
		East Otago High School	\$6,340
		Excelsior Rugby and Associated Sports Club	\$44,500
		Friends of the Forrester Gallery Society Inc	\$51,700
		Harbour Street Jazz Inc	\$15,000
		Kakanui School	\$2,400
		Maheno School	\$5,000
		Musical Theatre Ōamaru Inc	\$8,900
		North Otago Cricket Assn Inc	\$10,000
		North Otago Group Riding for the Disabled Association Inc	\$14,625
Queenstown-Lakes District			
Alpine Community Development Trust	\$3,000		
Central Lakes Breastfeeding Charitable Trust	\$3,200		
Challenge Wānaka Sports Trust	\$12,500		
Good Bitches Trust	\$3,700		
Hāwea Charitable Trust	\$6,000		
Hāwea Flat School	\$17,144		
Holy Family Catholic School	\$300		
Kāhu Youth Trust	\$8,695		
Lake Hāwea Community Centre Inc	\$5,600		
Merino Muster Limited	\$5,000		
Mint Charitable Trust	\$14,148		
Mount Aspiring Outdoor Education Centre Trust	\$3,000		

North Otago Hockey Association	\$2,500
North Otago Recreational Turf Trust	\$20,000
North Otago Rugby Football Union Inc	\$25,000
North Otago Sports Bodies Assn Inc	\$1,500
Ōamaru Albion Cricket Club Inc	\$1,900
Ōamaru Athletic Marist Rugby Football Club	\$1,100
Ōamaru Chorale	\$700
Ōamaru Combined Churches Christmas Parcels Trust	\$2,000
Ōamaru Pacific Island Trust	\$75,000
Ōamaru Poultry Pigeon & Canary Society	\$600
Ōamaru Tongan Methodist Parish	\$8,000
Ōamaru Victorian Heritage Celebrations	\$8,000
Ōhau Conservation Trust	\$3,000
Ōtemātātā Residents Assoc Inc	\$3,000
Palmerston Primary School	\$580
Papakaio School	\$15,750
Special Olympics Nth Otago Trust (NZ Spec O Lwr Sth Is Rgnl Cncl)	\$10,000
St Kevin's College	\$4,387.25
Steampunk NZ Incorporated	\$8,000
Te Hā o Maru Health and Social Services	\$710,990
The Y Central South Island	\$2,000
Waitaki Community Gardens Trust	\$4,000
Waitaki District Council - Aspiring Leaders	\$2,242.33
Waitaki District Council - Rural Travel Fund	\$10,000
Waitaki Event Centre Trust	\$2,000,000
Waitaki Girls High School	\$5,740
Waitaki Summer Music Camp	\$3,300
Waitaki Valley School	\$6,700
Wānaka Lake Swimmers Incorporated	\$600
Weston Playcentre	\$3,000
Weston School	\$3,705
Whiria te Waitaki Ltd	\$45,000
Waitaki District Total	\$3,146,759.58

Total Grants Approved 2025/26	\$12,990,328.25
Less Grant Writebacks	\$258,569
Total	12,731,759.25



Financials

Rauemi Pūroko Ahumoni

Summary consolidated statement of service performance

For the year ended 31 March 2026

Who Are We?

The Otago Community Trust is a philanthropic organisation which applies its Trust funds for charitable and other purposes which are of benefit to the Otago community.

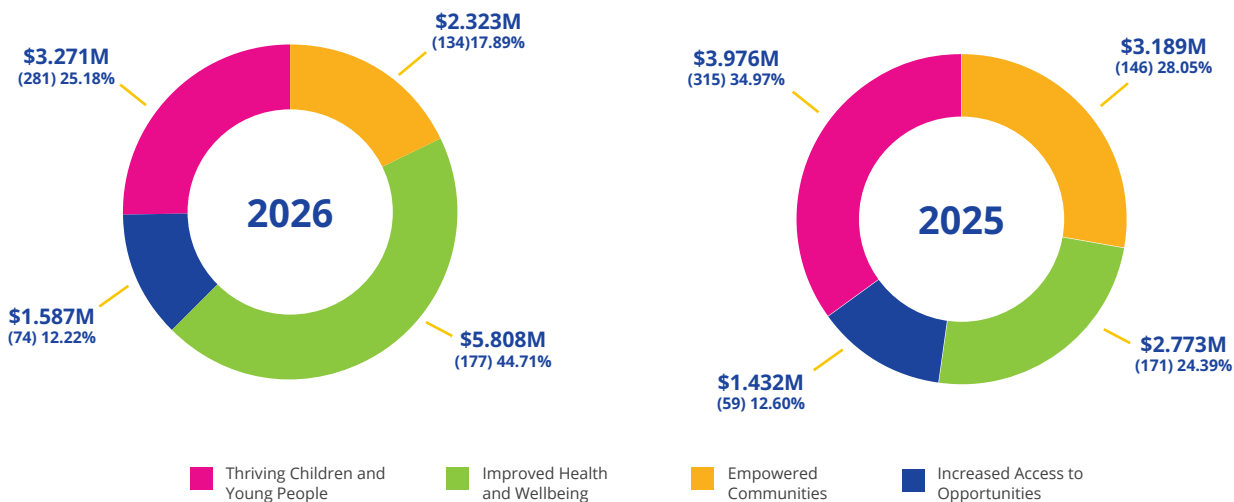
The Otago Community Trust has its origins in the Dunedin Savings Bank, established in 1864 by public spirited citizens seeking to encourage thrift within the community, and distribute surplus profits to charitable causes.

The Otago Community Trust aims to make wise investment decisions that preserve the original capital for future generations as well as having a significant grants budget each year.

Funding

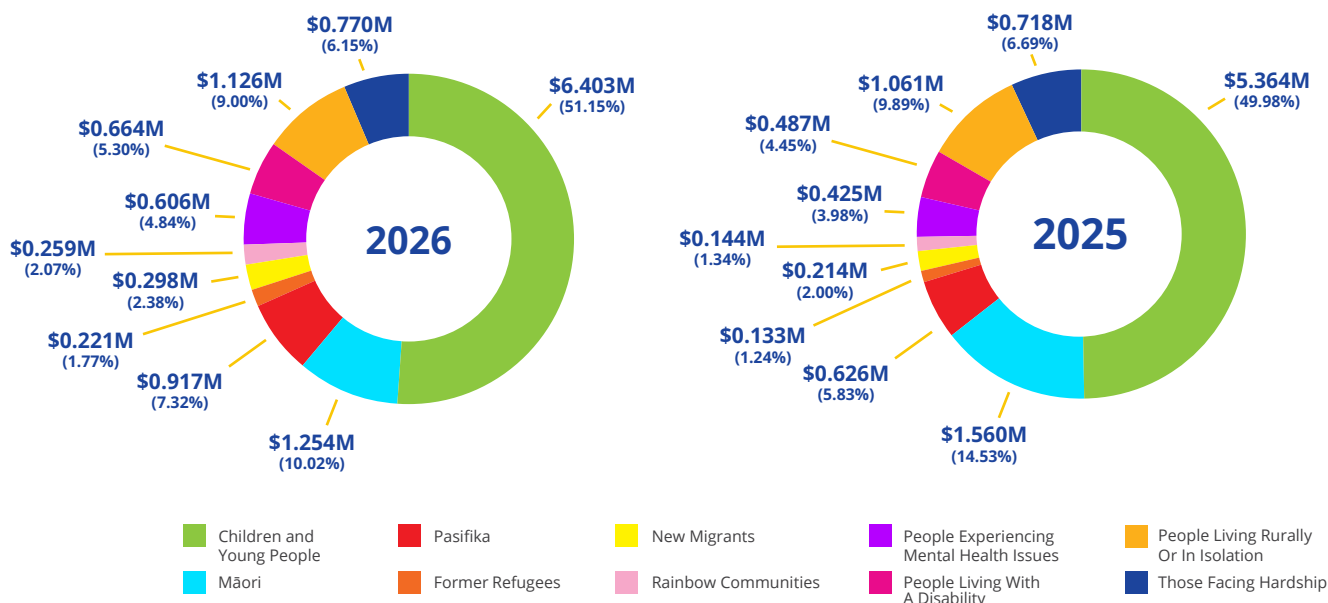
In 2026 we approved 666 grants totalling \$12.99 million (2025: 691 grants totalling \$11.37 million).

Funding was allocated to groups who aligned to our funding pillars, as follows:



How Have We Performed?

96% of grants supported priority communities, those most vulnerable (2025: 94%):



A list of all organisations funded during the year is available on the Trust's website.

In preparing the non-financial information presented in the Statement of Service Performance the Trustees in conjunction with management have sought to highlight several areas of importance and new initiatives which we consider to be of interest to our community. In doing so we acknowledge it is not possible to provide information on all our outcomes but have sought to provide information which we have considered relevant to reflect our overall results and significant outcomes for the year. During the coming financial year we plan to explore new measures for our organisational effectiveness activities, and ways to communicate these to the community in future.

Otago Community Trust Directory

For the year ended 31 March 2026

Trustees

Andrew Kilsby (Chairperson until May 2026)	Cromwell
Carole Adair	Dunedin
Rachel Bird	Dunedin
Jeremy Chang	Dunedin
Stacey Honeywill	Ōamaru
Alofa Lale (Resigned November 2025)	Dunedin
Barbara Long	Dunedin
Robyn McLean	Dunedin
Michael Stevens	Dunedin
Toni Talijancich (Appointed January 2026)	Dunedin
Bridget Tweed	Waitahuna
Rebecca Williams	Cromwell

Chief Executive

Jemma Adams

Registered Office

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

Auditor

Deloitte Limited
Dunedin

Solicitor

Anderson Lloyd
Dunedin

Investment Advisor

Mercer NZ Limited
Auckland

Bankers

Westpac Banking Corporation
Dunedin

Accountant

Findex NZ Limited
Dunedin

Summary consolidated statement of comprehensive revenue and expense

For the year ended 31 March 2026
in New Zealand Dollars (\$000's)

	2026	2025
Gains/(losses) from investments	25,685	17,354
Expenditure	(1,735)	(1,431)
Surplus / (Deficit) before grants	23,950	15,923
Grants approved during the year*	(12,732)	(11,138)
Other gains/(losses)	-	(2)
Surplus / (Deficit) before taxation	11,218	4,783
Income tax (expense)/refund	-	-
Surplus / (Deficit) for the year	11,218	4,783
Other comprehensive revenue and expenses	-	-
Total comprehensive revenue and expenses for the year	11,218	4,783

*after writebacks

Summary consolidated statement of changes in trust funds

For the year ended 31 March 2026
in New Zealand Dollars (\$000's)

	2026	2025
Total trust funds at the beginning of the year	313,150	308,367
Plus total comprehensive revenue and expenses for the year	11,218	4,783
Total trust funds at the end of the year	324,368	313,150

Summary consolidated statement of financial position

As at 31 March 2026
in New Zealand Dollars (\$000's)

Assets	2026	2025
Cash and cash equivalents	1,226	464
Other current assets	68	65
Total current assets	1,294	529
Other investments	329,283	318,747
Property, plant and equipment	1,422	1,475
Total non-current assets	330,705	320,222
Total assets	331,999	320,751

Summary consolidated statement of financial position continued...

Liabilities

Trade and other payables (including grants)	4,982	6,178
Total current liabilities	4,982	6,178
Trade and other payables (including grants)	2,649	1,423
Total non-current liabilities	2,649	1,423
Total liabilities	7,631	7,601
Net assets / Trust Funds	324,368	313,150

Approved on behalf of the Trustees



Stacey Honeywill
Chairperson
28 July 2026



Carole Adair
Trustee
28 July 2026

Summary consolidated statement of cash flows

For the year ended 31 March 2026
in New Zealand Dollars (\$000's)

	2026	2025
Net cash outflow from operating activities	(14,233)	(11,844)
Net Cash from/(used) in investing activities	14,995	11,870
Net cash from/(used) in financing activities	-	-
Net (decrease)/increase in cash and cash equivalents	762	26
Cash and cash equivalents at 1 April	464	438
Cash and cash equivalents at 31 March	1,226	464

Notes to the summary consolidated financial statements

For the year ended 31 March 2026

These are the summary consolidated financial statements of Otago Community Trust (the "Trust") for the year ended 31 March 2026.

The specific disclosures included in these summary consolidated financial statements have been extracted from the full annual consolidated financial statements dated 31 March 2026. The full annual consolidated financial statements were approved for issue by the Trustees on 28 July 2026 and have been prepared in accordance with

Tier 2 Public Benefit Entity (PBE) Financial Reporting Standards as issued by the New Zealand External Reporting Board (XRB). They comply with New Zealand Equivalents to International Public Sector Accounting Standards Reduced Disclosure Regime (NZ IPSAS with RDR) and other applicable Financial Reporting Standards as appropriate to Public Benefit Entities.

An unmodified audit opinion has been received on the full consolidated financial statements for the year ended 31 March 2026. A copy of the full Trust consolidated financial statements for the year ended 31 March 2026 may be obtained by contacting the Trust on (03) 479 0994, or by visiting www.oct.org.nz.

This summary financial report cannot be expected to provide as complete an understanding as provided by the full consolidated financial statements of the Trust.

This summary financial report has been examined by our auditor for consistency with the full consolidated financial statements. An unqualified audit opinion has been received. These summary consolidated financial statements were approved for issue by the Trustees on 28 July 2026.

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 PBE FRS 43: Summary Financial Statements. The presentation currency is New Zealand dollars, rounded to the nearest thousand dollars.

The full consolidated financial statements upon which these Summary Financial Statements are based, have been prepared to comply with the Accounting Standards Framework for Public Benefit Entities 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 Group adopted all mandatory new or amended accounting standards interpretation during the year. None had a significant impact on the financial statements.

Income tax

The Trust and its 100% owned subsidiary Fillmor House Limited are exempt from income tax pursuant to sections CW 41, 42 & 52 of the Income Tax Act 2007.

Events after the reporting period

No events have occurred subsequent to year end that significantly affect the operations of the Trust (2025: None).

Independent Auditor's Report

To the Trustees of Otago Community Trust

Opinion

We have audited the consolidated performance report of Otago Community Trust (the 'entity') and its subsidiaries (the group), which comprise the consolidated financial statements on pages 11 to 32, and the consolidated statement of service performance on pages 2 to 10. The complete set of consolidated financial statements comprise the consolidated statement of financial position as at 31 March 2026, and the consolidated statement of comprehensive revenue and expense, statement of changes in trust funds and statement of cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies.

In our opinion, the accompanying consolidated performance report presents fairly, in all material respects:

- the consolidated financial position of the group as at 31 March 2026, and its consolidated financial performance and cash flows for the year then ended; and
- the consolidated service performance for the year ended 31 March 2026 in that the service performance information is appropriate and meaningful and in accordance with the group's measurement bases or evaluation methods;

in accordance with Public Benefit Entity Standards Reduced Disclosure Regime ('PBE Standards RDR') issued by the New Zealand Accounting Standards Board.

Basis for opinion

We conducted our audit of the consolidated financial statements in accordance with International Standards on Auditing ('ISAs'), and the audit of the consolidated service performance information in accordance with the ISAs (NZ) and New Zealand Auditing Standard 1 The Audit of Service Performance Information ('NZ AS 1'). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Consolidated Performance Report section of our report.

We are independent of the group in accordance with Professional and Ethical Standard 1 International Code of Ethics for Assurance Practitioners (including International Independence Standards) (New Zealand) issued by the New Zealand Auditing and Assurance Standards Board, and we have fulfilled our other ethical responsibilities in accordance with these requirements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Other than in our capacity as auditor, we have no relationship with or interests in the entity.

Other information

The Trustees are responsible on behalf of the group for the other information. The other information comprises the information in the Annual Report that accompanies the consolidated performance report and the audit report.

Our opinion on the consolidated performance report does not cover the other information and we do not express any form of assurance conclusion thereon.

Our responsibility is to read the other information and consider whether it is materially inconsistent with the consolidated performance report or our knowledge obtained in the audit or otherwise appears to be materially misstated. If so, we are required to report that fact. We have nothing to report in this regard.

Trustees' responsibilities for the summary consolidated financial statements

The Trustees are responsible on behalf of the group for:

- the preparation and fair presentation of the consolidated financial statements and consolidated statement of service performance in accordance with PBE Standards RDR;
- the selection of elements/aspects of service performance, performance measures and/or descriptions and measurement bases or evaluation methods that present service performance information that is appropriate and meaningful in accordance with PBE Standards RDR;
- the preparation and fair presentation of service performance information in accordance with the Group's measurement bases or evaluation methods, in accordance with PBE Standards RDR;
- the overall presentation, structure and content of the service performance information in accordance with PBE Standards RDR; and
- such internal control as the Trustees determine is necessary to enable the preparation of a consolidated performance report that is free from material misstatement, whether due to fraud or error.

In preparing the consolidated performance report, the Trustees are responsible on behalf of the group for assessing the group's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the group or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the consolidated performance report

Our objectives are to obtain reasonable assurance about whether the consolidated performance report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (NZ) and NZ AS 1 (Revised) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of this consolidated performance report.

A further description of our responsibilities for the audit of the consolidated performance report is located on at the External Reporting Board's website at:

<https://www.xrb.govt.nz/standards/assurance-standards/auditors-responsibilities/audit-report-13-1/>

This description forms part of our auditor's report.

Restriction on use

This report is made solely to the Trustees, as a body, in accordance with Section 15(e) of the Trust Deed. 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 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 audit work, for this report, or for the opinions we have formed.

Dunedin, New Zealand
28 July 2026

Deloitte Limited



A Year of Colour and Community

Dunedin Indian Association | \$7,350 | Greater Dunedin

The Dunedin Indian Association is dedicated to preserving and sharing the richness of Indian heritage with the wider Otago community. Throughout 2025–2026, the Association delivered a vibrant programme of cultural festivals and events that brought people together across the city.

The year's calendar includes beloved celebrations such as Diwali – the Festival of Lights, Holi – the Festival of Colours, and International Yoga Day. Alongside these, the Association runs workshops in folk dance, Henna, and cultural competitions – providing meaningful opportunities for both the Indian community and newcomers to connect and learn.

The Dunedin Diwali Festival proved a highlight, drawing huge crowds and delivering a spectacular showcase of light, colour, music, and Indian street food. Volunteers, food stalls, artisans, and community members came together to create what the Association described as Dunedin's largest and most successful Diwali event yet – a testament to the incredible effort of everyone involved.

Lighting Up Cromwell: A Year of Celebration

Cromwell and Districts Promotion Group Inc
\$25,000 | Central Otago

The Cromwell & Districts Promotion Group has been encouraging people to play and stay in Cromwell since 1987. Each year, alongside a range of community initiatives, they deliver a calendar of events that bring locals and visitors together that are free to attend and open to all.

In 2025, three events marked the calendar. Light Up Winter returned to Anderson Park Rose Garden in August, drawing crowds to an evening of lanterns, live music, fire dancers, aerial performances, and street food. First held in 2017, it has grown into a much-loved fixture of Central Otago's winter calendar - a warm gathering point during the coldest months of the year.

October brought the Cromwell Street Party and Fireworks over the Labour Day long weekend. A tradition since 1992, the event makes full use of Cromwell's lakefront and Heritage Precinct, welcoming visitors from across the region to celebrate the town in all its colour.

December closed the year with the National Cherry Pit-Spit Championship - a cheerful event held in the Heritage Precinct since 2006, drawing competitors from as far as Dunedin and Christchurch.

Image, BrandStories

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www.oct.org.nz

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