



ANNUAL REPORT

Rīpoata-ā-Tau
2024 – 2025

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 tītāpu, 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 ō o tō tātau hāpori whānui.
Ka whakaatuhia kā mata, kā kanohi o kā tini
hāpori, o kā iwi katoa o tō tātau 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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Financials

The Valley Project: Building Community Connections

**Amount Granted | \$25,000
Greater Dunedin**

The Valley Project continues to serve as a vital community hub across North East Valley, Pine Hill, Ōpoho, Dalmore, Liberton, Normanby, and Upper Junction. Through its many initiatives focused on families and social cohesion, the project strengthens neighbourhood bonds and enhances wellbeing.

From food resilience programmes to refugee support and environmental stewardship, The Valley Project aims to comprehensively address local needs. Regular community events, markets, and volunteer development opportunities create meaningful connections among residents.



Chair & CE Report

Nau mai, haere mai. Welcome.

The 2024-2025 financial year has marked a transformative chapter for Otago Community Trust. Despite the challenges of a volatile economic environment, we have much to celebrate as we reflect on our achievements and look toward the future with optimism.

Partnership with Manawhenua

The Trust was honoured to sign a relationship agreement with Kā Papatipu Rūnaka o Araiteuru - Kāti Huirapa Rūnaka ki Puketeraki, Te Rūnaka o Ōtākou, and Te Rūnaka o Moeraki. Finalised early in the Trust's 2026 financial year, this agreement represents an exciting new chapter in our history. Otago Community Trust is a perpetual organisation committed to fostering strong communities and wellbeing. Papatipu Rūnaka are intergenerational whānau and hapū organisations guided by the tribal whakatauki "Mō tātou, ā, mō kā uru a muri ake nei" (For us and our children after us). Rūnaka are committed to kaitiakitaka and manaakitaka, meaning they seek wellbeing for all people and the natural environment within the takiwā. We look forward to meaningful collaboration, thereby seeking to enhance outcomes for all communities in the region.

Community Impact

At the heart of Otago Community Trust lies our commitment to tautoko and enhance the communities we serve. This year, we approved \$11.37 million in grants throughout Otago, supporting a wide range of kaupapa and projects that reflect the rich, creative, and diverse aspirations of our region.

Among the highlights is the Manuherekia Valleys Community Hub - a project that exemplifies community-driven development and collaboration. Our continued partnership with the Warmer Kiwi Homes programme has helped improve housing conditions for many vulnerable families across Otago, contributing to better health outcomes and reduced energy costs.

The Impact Fund, through the Tamariki & Rangatahi Strategy, focuses on a select number of innovative, game-changing projects aimed at improving outcomes for tamariki and rangatahi. This year, two new Impact Fund initiatives were established - Hono ki Tua and Empowering Futures - Tangata Moana Youth Plan & Action in Otepoti. These two projects, led by Māori and Pasifika, will support strong connections and a sense of belonging and identity among young people, creating pathways for future generations.

The dedication and resilience of community groups and not-for-profit organisations throughout Otago continue to inspire us. Their tireless mahi transforms lives and builds stronger, more connected communities. Kā mihi nui ki a koe to these organisations for their invaluable contributions to the wellbeing of our region.

Investment Performance

The Trust's funds ended the financial year valued at \$318.8 million, achieving an annual return of 6.4%. The final two months of the financial year were affected by international market volatility, a trend we anticipate will continue into FY2026.

As a long-term investor, the Trust's asset allocation and reserving policies position us well to navigate these challenging conditions. We maintain a close working relationship with our investment advisers, Mercer, and regularly review our investment strategy to ensure it remains robust and responsive to changing market conditions.

Board Transitions

This year we farewelled trustees Raewyn van Gool and Fraser McKenzie, whose contributions to the Trust have been significant and greatly appreciated. We were deeply saddened by Fraser's passing earlier in the year and remember him for his dedicated service. We welcomed the re-appointments of Dr Michael Stevens and Rebecca Williams, ensuring valuable continuity in our governance.

The Trust also benefited from the fresh perspectives of new trustees Stacey Honeywill, Jeremy Chang, and Rachel Bird, whose diverse skills and experience complement our existing Board capabilities.

Team Development

This year we farewelled Liz Harburg and welcomed several new kaimahi to the team. We're delighted to have welcomed an additional Grants Manager, Penelope Pask, as well as Dr. Louise Kewene-Doig (Ngāti Hikairo, Ngāti Hauā, Ngāti Ingarangi) as Policy & Research Manager, and Nikita Choveaux as our new Community Engagement Advisor.

With our expanded team we are better able to engage with communities, build relationships, and address complex strategic and policy questions, with greater insight and responsiveness.

Looking Ahead

As we move into the new financial year, we recognise that the world has evolved rapidly since our strategic plan was developed in 2021.

We intend to engage with communities throughout the region in the coming year, listening to their aspirations and challenges, in order to review and update our strategy.

Otago Community Trust remains committed to its vision of strong, vibrant, and connected communities across our region. We are optimistic about the opportunities that lie ahead, even in challenging times, and the difference we can make together.

Kā mihi nui,
Andy Kilsby
Jemma Adams





Dunedin Fringe Festival 2025,
Armstrong Photography



Moana Nui Festival



Ranfurly Volunteer Fire Brigade



Wānaka Festival of Colour, Wahine Mātātoa



Lawrence Chinese Camp



STOP Inc. Save The Otago Peninsula



Vanished World Centre, Waitaki Whitestone Geopark



Snow Sports NZ



NZ International Science Festival,
Matariki Drone Show



Ōamaru New Years Party at the Gardens, Sonia Martínez

Governance

Tō mātou rōpū

Our Trustees | Ō Mātou Kaitiaki

Otago Community Trust is governed by up to 12 Trustees who are appointed by the Minister of Finance. Two Trustees stepped down during this financial year, and three new Trustees were appointed in December 2024: Jeremy Chang, Rachel Bird and Stacey Honeywill.

We acknowledge with deep sadness the recent passing of Fraser McKenzie, who served as a dedicated member of our Board from September 2023 until March 2025.



Andy Kilsby
Chair /
Central Otago



Barb Long
Deputy Chair /
Greater Dunedin



Alofa Lale
Greater Dunedin



Bridget Tweed
South Otago



Carole Adair
Greater Dunedin



Fraser McKenzie
Ōamaru



Jeremy Chang
Greater Dunedin



Dr Michael Stevens
Greater Dunedin



Raewyn van Gool
Central Otago



Rachel Bird
Greater Dunedin



Rebecca Williams
Central Otago



Robyn McLean
Greater Dunedin



Stacey Honeywill
North Otago

Our Kaupapa | 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



\$318.8m

Value of the trust funds as at 31 March 2025



6.4%

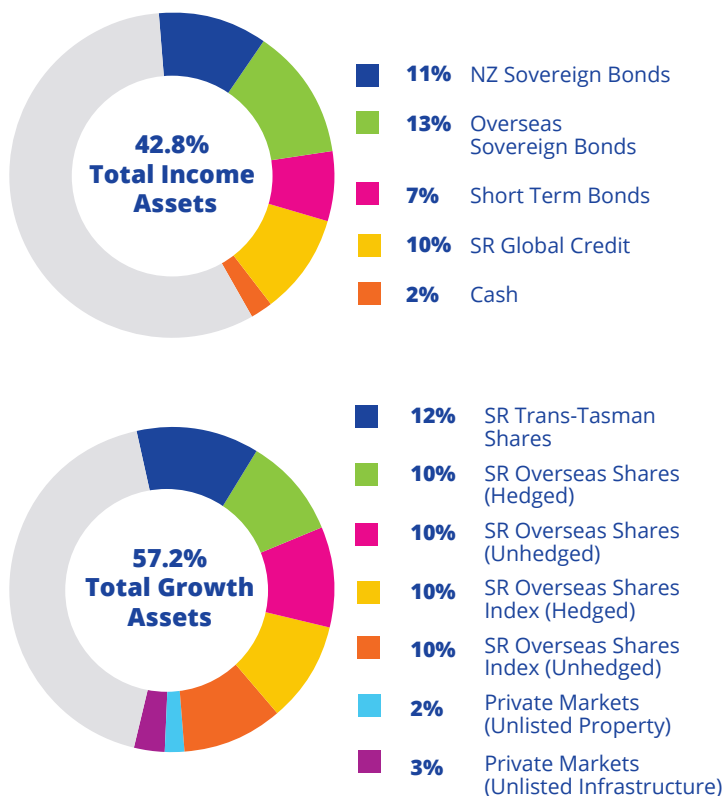
Return on investment as at 31 March 2025



\$230.6m

Funding approved across Otago since inception as at 31 March 2025

Strategic Allocation Of Financial Assets



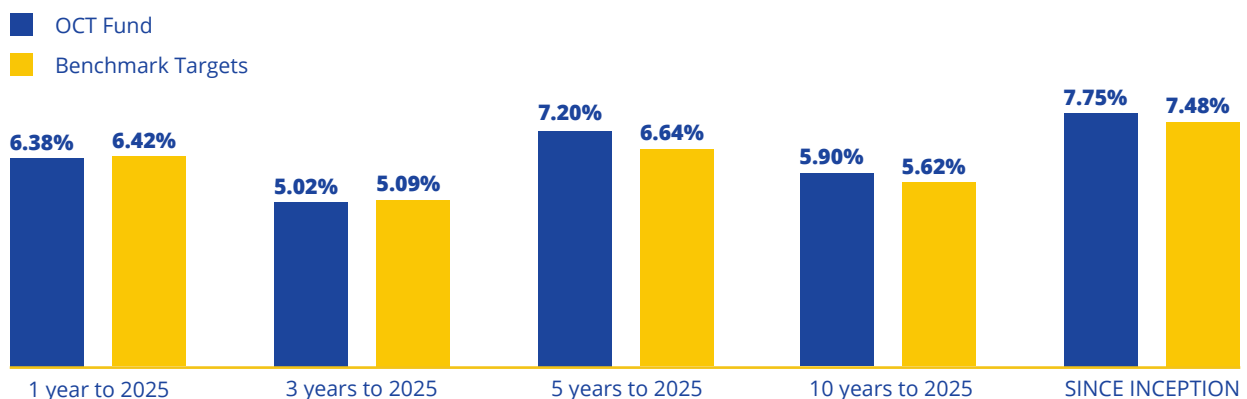
The year ended 31 March 2025 has been a volatile period for global financial markets, marked by a confluence of economic policies, geopolitical tensions, and transformative technological advancements.

The MSCI World index finished up 7.0% (compared with 26.2% in the year ended March 2024) reflecting the significant challenges that the U.S. equity market has faced, particularly large-cap growth stocks. The 'Magnificent 7' tech giants, despite their dominance, saw their growth gaps narrow as investor sentiment shifted from optimism to cautiousness, influenced by proposed tariff policies and pending rate cuts. Despite the overall market volatility, the AI-driven transformation has been a significant trend, with companies leveraging artificial intelligence to enhance productivity and operational efficiency, shifting investor preferences towards firms at the forefront of technological innovation.

The fixed interest markets, both globally and within New Zealand, have navigated through fluctuating interest rates and inflationary pressures.

The economic landscape in early 2025 has been characterised by heightened uncertainty stemming from the executive orders implemented by the US administration, which have introduced significant volatility into global markets and resulted in a pivot from growth-orientated sectors to value and defensive sectors which have robust fundamentals and sustainable earnings growth.

Otago Community Trust Annual Returns (Year to 31 March)



Our Funding

Tō Mātou Tahua Pūtea



Otago Community Trust provides grants to not-for-profit community groups and projects that make a positive contribution to Otago communities. We aim to build vibrant, resilient communities focused on people, heritage, and environment.

In April 2022, we established four strategic Funding Pillars to guide our grant-making decisions, 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



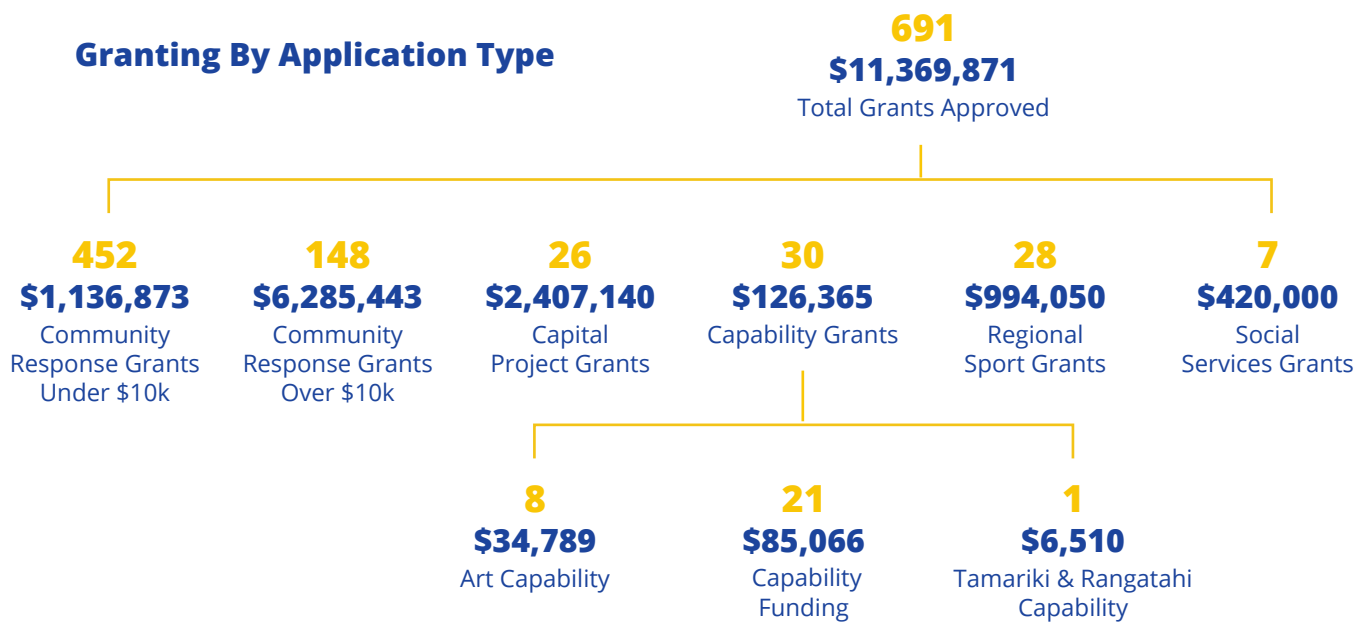
94% Of grants supported
priority communities.

Granting By Funding Sector

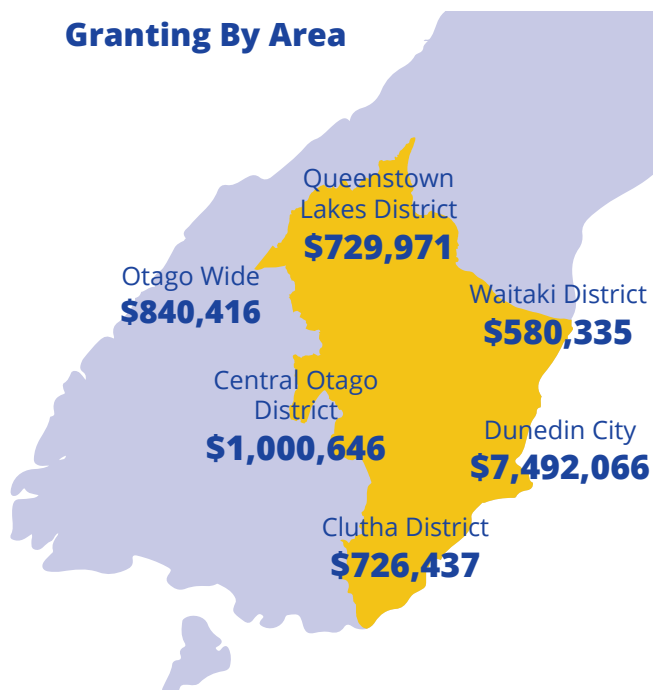


For further information on our funding priorities visit:
www.oct.org.nz/about-us/our-strategic-plan

Granting By Application Type



Granting By Area



Rural Theatre Thrives: 'Mousetrap' Opens New Chapter

Amount Granted | \$4,000 | South Otago

The South Otago Theatrical Society successfully staged Agatha Christie's classic 'The Mousetrap' as their inaugural production at Te Pou Ō Mata-Au community hub in Balclutha. This talented group of local volunteers - including farmers, teachers, and students - continued their mission of providing affordable live theatre to rural communities.

The production attracted audiences from across the district, with particularly strong attendance at matinee performances popular among elderly patrons. The Society's dedication to making quality theatre accessible in South Otago demonstrates the vital cultural contribution community arts organisations make to our regional landscape.



Climate Action

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. This initial plan has now been successfully implemented. **The full report is available on our website.**

Climate Action Plan 2025-2027

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

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

Use a robust and evidence-based approach to assess our investments and set and achieve targets to reduce the Trust's investment portfolio's carbon exposure.

3. Internal Operations

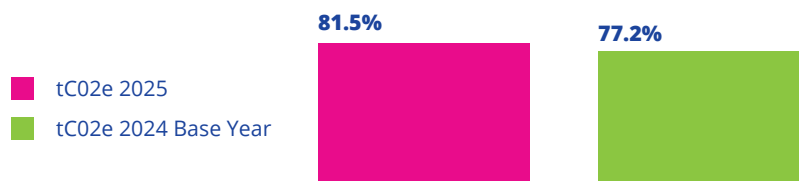
Embed climate responsibility into our culture and ethos, starting with measuring our internal greenhouse gas footprint and setting and achieving targets to reduce emissions and achieve a carbon neutral position.



Our Carbon Footprint

OCT first measured its carbon footprint in 2024, and have done so again in 2025. The bar graph below shows the emissions from this year's core office operations, compared with our 2024 baseline year.

Operational Emissions



This year's emissions increased due to team expansion and related expenses.

Emissions Reduction Targets

We have also established targets for reducing our emissions. 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.

43%

Reduction in investment emissions by **2030** (target).



Tieke Returns to Mainland Otago: A Conservation Milestone

Amount Granted | \$16,793 | Greater Dunedin

In a significant conservation achievement, Orokonui Ecosanctuary welcomed the South Island Saddleback (Tieke) back to mainland Otago in early 2025, after more than a century's absence. This historic translocation project brought birds from the Tītī Islands to establish a new mainland population of this threatened species.

The initiative emerged from a collaborative partnership between the Rakiura Tītī Islands Administering Body, Kāti Huirapa Rūnaka ki Puketeraki, and Orokonui Ecosanctuary. It exemplifies the crucial role of manawhenua as kaitiaki (guardians) of taonga species.

Enhanced biosecurity measures, including expanded trap networks and strategic vegetation management, were implemented to ensure the sanctuary remains predator-free.

Tamariki & Rangatahi Strategy

In April 2022, Otago Community Trust unveiled its Tamariki & Rangatahi Strategy, committing up to \$10 million across a five-year period. 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.

The Trust established a trio of funds designed to support programmes and organisations dedicated to enhancing the lives of youth throughout the region:

- Impact for Tamariki and Rangatahi Fund
- Rangatahi-Led Fund
- Tamariki and Rangatahi Sector Capability Fund

We spent
\$2,303,000
total in 24/25

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. Two additional grants were approved this year:

1. Empowering Futures — Tangata Moana Youth Plan & Action in Ōtepoti.

Pacific Trust Otago (PTO) received \$425,000 for a three-year transformative youth development initiative targeting Tangata Moana youth in Ōtepoti. This project aims to reach Pacific youth aged 16-24 through comprehensive engagement and development programs.

The initiative will begin with a community-led research phase using talanoa to develop a strategy and action plan. Implementation in years two and three will focus on mental wellbeing, career opportunities, and cultural arts programming.

The project seeks to strengthen Pacific languages, arts, music, spirituality, and indigenous knowledge while increasing pride in Pacific cultural identities, promoting positive mental wellbeing, improving intergenerational communication, strengthening community belonging, and inspiring youth through successful Pasifika role models.



Pacific Trust Otago

2. Hono ki Tua Education Initiative

The Trust's largest grant to date from the Impact for Tamariki & Rangatahi Fund is \$1.804 million over three years to support Hono ki Tua, an innovative education hub established by Otago's three Papatipu Rūnaka: Kāti Huirapa Rūnaka ki Puketeraki, Te Rūnaka o Ōtākou, and Te Rūnaka o Moeraki.

This initiative will employ dedicated Kaitoko Mātauraka (Education Experts) and a Kaikōkiri Mātauraka (Team Leader) to work with education providers across Otago's early childhood, primary, and secondary education sectors. The hub will deliver kapa haka training, marae-based school programs, and workshops for whānau and kaiako, while helping educational providers better understand rūnaka aspirations as mana whenua.



Hono ki Tua

Rangatahi-Led Fund: Youth Empowering Youth

The Rangatahi-Led Fund, launched in 2023, is now flourishing in its third year as a transformative initiative empowering youth leadership and community innovation across Otago.

This distinctive funding stream places decision-making power directly in the hands of young people, providing grants for youth-conceived and youth-led projects that address the needs and aspirations of their peers. What makes this fund truly special is its 'by rangatahi, for rangatahi' approach, where funding recommendations come directly from the young people who understand their communities best.

At the heart of this initiative are four dynamic regional rūpū representing Ōtepoti/Dunedin, South Otago, North Otago, and Central Otago. These youth groups collaborate closely with Otago Community Trust to shape the fund's purpose, establish criteria, and make final funding decisions for grants up to \$5,000.

The fund has supported an impressive range of initiatives across the region over the last financial year. In Ōtepoti/Dunedin, grants have enriched cultural connections through projects like the Samoan Students Association's So'otago conference and the Indian Students Association Cultural Showcase. Community-minded projects like the Brockville Pavement Krew's 'Toi Tiriti 275' mural demonstrate young people's commitment to environmental stewardship and community beautification.

North Otago has seen cultural initiatives like 'Waananga ki Te Kapo,' connecting young people with marae experiences, alongside mental health campaigns like Waitaki Boys' 'Running 72' and creative projects like Youth Week 2024's giant chair in Ōamaru that mysteriously relocates around the town. South Otago celebrated Te Reo Māori through the Māori Language Week Festival at South Otago High School, while Central Otago launched the Sticks 'n' Stones 'Advocate Network' online platform and established a Bike Repair Station at Alexandra Primary School.

With 22 grants distributed in 2024 alone, the Rangatahi-Led Fund continues to demonstrate the power of youth-led decision-making in creating meaningful change that resonates with young people's actual needs and aspirations.

This partnership recognises that young people possess valuable insights about the challenges and opportunities facing their communities.



Youth Week Giant Chair, Ōamaru

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

2024 Rangatahi-Led Fund Rūpū members

North Otago

Blayde Forbes
Sophia Sam
Siara Sam
Ellen McAtamney
Sophie Notman

Ōtepoti/Dunedin

Adeleah Nukanuka
Arina Aizal
Meischarla Pinn
Blake Armstrong
Isabella Miscisco
Tabitha Hildyard

Zoe McElrea
Rani Crossan
Ethan Te Raki
Lucy Ma'ole
Adison Nukanuka

South Otago

Alex Anderson
Nancy Antill
Paige King
Tipene Wereta

Central Otago

Noah Moody
James Avenell
Chloe Murray
Jessie McNeil
Chirlene Vorster



A Journey in Youth-Led Funding with Abby Golden

When Abby first applied to OCT's Rangatahi-Led Fund (RLF) in early 2024, she was focused on securing funding for Te Ara Tīrama – her online platform connecting young changemakers. That initial grant launched more than just her project; it opened a pathway from grant recipient to decision-maker.

Abby has been a member of the RLF Rōpū, having transitioned from writing applications for the RLF, to evaluating them.

The Journey to the Table

The connection began when Abby reached out to OCT for feedback on a learning module she was developing for young people applying for community funding. That conversation led to an invitation to join the rōpū the following year.

For Abby, who had served on governance boards since age 16, there was no hesitation. "I was so keen to continue contributing to this space and making a difference for rangatahi across Otago" she says. Her passion for youth participation in decision-making made the opportunity irresistible.

Seeing Both Sides

The transition from applicant to evaluator has been eye-opening. "As someone who's applied for funding, I've always been focussed on how to tell our story clearly," Abby explains. "But being on the other side, I've gained a whole new appreciation for how complex and thoughtful the decision-making process is."

This dual perspective proves invaluable when reviewing applications, particularly from emerging initiatives. "It's helped me look beyond polished wording or perfect budgets and instead focus on the heart of the mahi – who it's for, why it matters, and what impact it could have."

The Power of Lived Experience

What makes rangatahi involvement so crucial, according to Abby, is lived experience. "Rangatahi know what's relevant, what's needed, and what actually resonates with our peers, because we're living it every day."



Abby Golden

Breaking Down Barriers

The experience has transformed Abby's understanding of funding systems. Previously, the process felt like "a bit of a black box" where applicants hoped decision-makers understood their vision. Now she sees both the care behind funding decisions and opportunities to make processes more accessible.

"It's challenged me to think more critically about how we make sure funding processes are fair, transparent, and accessible – especially for those who might not fit traditional systems but are doing incredible mahi."

Advice and Looking Forward

To young people considering governance opportunities, Abby's advice is simple: "Just go for it! You bring value just by showing up with your lived experience, your passion, and your perspective."

Abby's journey illustrates the transformative potential of youth-led philanthropy – when rangatahi are genuinely included in decision-making, they bring perspectives that make funding more relevant, accessible, and impactful for the communities they serve.



Toby Longman, Alexandra Primary
Image: Megan Longman



Fred is Cold



Ōtepoti Rangatahi-Led
Fund Podcast



South Otago High School



South Otago High School



Te Ara Tīrama Workshop

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.

Pound Paws Rescue

Amount Granted | \$4,650 | Otago

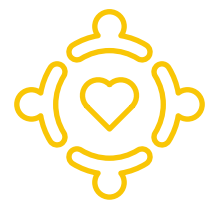
Pound Paws Rescue continues to make a significant impact across Otago through its comprehensive Dog Desexing Programme. This vital initiative addresses the financial barriers many pet owners face when seeking veterinary care for their companions.

The innovative approach of Pound Paws includes partnerships with veterinary clinics, creating a sustainable model where pet owners contribute what they can toward costs, with these funds recycling back into the programme to help more animals.

Beyond desexing services, Pound Paws operates a much-needed pet food bank and kennel library, as well as successfully finding homes for over 100 dogs and puppies in the last year through their Community Rehoming programme.

Empowered Communities

Hapori whaikaha



Otago Polyfest: A Cornerstone of Otago's Cultural Calendar

Te Mana Āhua Ake Charitable Trust | \$50,000 | Greater Dunedin

Continuing its legacy as one of Otago's most anticipated annual events, the beloved Otago Polyfest stands as a cultural cornerstone for the region. This celebrated festival showcases our diverse heritage through performances by over 5,500 young people from approximately 160 educational institutions across Dunedin, Waitaki, Clutha, Queenstown Lakes, and Central Otago.

Organised by Te Mana Āhua Ake Trust, the five-day celebration maintains its tradition of accessibility with nominal entry fees, ensuring economic barriers don't prevent community participation. This model of inclusion encourages families to attend multiple performances throughout the festival, supporting their tamariki and rangatahi while experiencing the rich cultural tapestry of the region.

The Village marketplace and Te Moananui a Kiwa community concert enrich the experience for the 10,000 in-person attendees who gather each year. Meanwhile, the festival's live-streaming services reach 40,000 viewers nationally and internationally, showcasing Otago on a global stage.

Beyond performances, Otago Polyfest develops young talent through its production mentorship program, training rangatahi aged 14-24 in event management skills. This initiative creates pathways to careers in performing arts, technology, event management, and production.

Year after year, Otago Polyfest proves itself invaluable to our cultural landscape, creating an environment where shared experiences strengthen collective identities and foster the intergenerational connections that define this cherished Otago tradition.



Te Pākihi o Maru Pasifika Group, Rewa Pene

Protecting Wānaka's Native Wildlife: Community Conservation in Action

Predator Free Wānaka (formerly Wānaka Backyard Trapping Inc) \$7,000 | Queenstown Lakes

Predator Free Wānaka stands as a shining example of community-driven conservation. Established in 2018, this dedicated volunteer network works tirelessly to reduce predator populations across the Wānaka, Hāwea, and Luggate areas, creating safe havens for native wildlife to thrive.

The results speak for themselves: residents now enjoy the melodious songs of bellbirds and tui, while sightings of kingfishers have notably increased. Waterbird diversity has flourished, with scaup, little shags, black shags, paradise shelducks, white-faced herons, shovellers, grey teals, and coots now commonly observed - testament to the improved ecological balance fostered by the group's efforts.

The organisation's structure includes technical trapping experts, an education advisor, a community



Predator Free Wānaka

engagement coordinator, and several trapline coordinators, supported by over 125 volunteers who serve as trappers and trap maintenance specialists. Their systematic approach includes adding multiple new trap lines annually, steadily expanding their protective coverage across the region.

Beyond predator control, the group conducts educational outreach in local schools, fostering environmental stewardship in younger generations.

Improved Health & Wellbeing

Ka pakari ake te oraka



Transforming Lives Through Equine Therapy

Central Otago Riding for the Disabled
\$9,000 | Central Otago

The Alexandra Riding for the Disabled (RDA) programme continues to create meaningful impact in the community, providing transformative equine therapy experiences for people living with disabilities and special needs. Operating from an arena at the Dunstan Equestrian Centre, this essential service primarily serves tamariki and rangatahi referred through health and education providers during Terms One and Four each year.

With consistently full sessions accommodating up to 26 riders per term and a persistent waiting list, RDA's dedicated volunteer team works with their five specially-trained horses to deliver goal-based riding experiences that improve physical strength, enhance emotional wellbeing, and build confidence in participants.

Research demonstrates the programme's remarkable effectiveness. These benefits ripple throughout the community, positively affecting whānau, kura



Central Otago Riding for the Disabled

(schools), and support agencies who report significant improvements in riders' physical and social skills.

The programme operates across three interconnected areas - therapy for physical disabilities, education support for school-based programmes, and sport and recreation for those unable to participate in mainstream sporting activities. This holistic approach allows Central Otago RDA to customise experiences for each rider's specific needs.

Empowering Otago Youth Through Service

The Student Volunteer Army Foundation | \$6,240 | Otago

The Student Volunteer Army (SVA) continues to make significant impact in fostering a culture of service among Otago youth. The SVA Service Award programme has made remarkable progress in the region, with 619 active volunteers across 14 schools contributing over 17,500 hours of community service in 2024 alone.

This nationally-recognised framework acknowledges student volunteering through a five-level badge system, celebrating diverse acts of service within communities, whānau, and schools. Students record their volunteer hours in the SVA web app, building valuable service portfolios that support applications for scholarships, leadership opportunities, tertiary education, and employment.

The SVA's inclusive approach to volunteering ensures equitable participation for all rangatahi. Their broad definition of service recognises the many different forms volunteering might take in various contexts. Meanwhile, the Ambassador Programme supports outstanding students to represent their schools, attend educational workshops, and develop essential leadership, public speaking, and crisis response skills.

The programme is delivered in partnership with School Kit, who provide vital support through school visits, distributing achievement pins, and facilitating communication with participating schools.

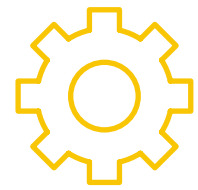
Supporting the SVA helps build resilient communities while equipping Otago's young people with skills and confidence that will benefit them throughout their lives, nurturing the next generation of community-minded leaders.



Student Volunteer Army

Increased Access To Opportunities

Ka nui ake te whai wāhi



Wheels in Motion: An Innovative Pump Track for All Ages

Clutha Parks Trust | \$32,000 | South Otago

The Clutha Parks Trust has developed an exciting new 700m² asphalt pump track at Centennial Park in Balclutha. This innovative facility marks a significant milestone in the transformation of Centennial Park into a destination playground and recreational hub for the community.



Clutha Parks Trust

The pump track features a carefully designed circuit of rollers and bermed turns that riders navigate using body momentum rather than pedalling. The facility caters to users of all ages and abilities, from beginners to experienced riders, providing a safe environment for skill development and physical activity.

As part of a broader vision, the pump track integrates with plans to develop the connected Naish Park into a Garden of Significance while enhancing Centennial Park with additional amenities including sheltered picnic areas, public toilets, and a dedicated dog park. The comprehensive project will also incorporate cycling and walking pathways linking to the river and swimming pool, creating a cohesive recreational network.

The pump track represents a valuable community asset that fosters social connections, promotes outdoor activity, and offer residents throughout the Clutha District access to modern recreational facilities. Additional phases of development will follow as the Trust continues its mission to create vibrant, accessible spaces for all community members to enjoy.

Powering Community Resilience: Jenni the Generator in Ōmārama

**Residents Association Ōmārama Inc
\$10,000 | North Otago**

The Residents' Association of Ōmārama have successfully secured a vital 40KVA generator - affectionately named Jenni - to enhance the community's emergency preparedness. This critical resource ensures the Ōmārama Community Centre, the designated Emergency Hub for the area, can maintain power during natural disasters and emergencies.

Nestled in Otago's high country, Ōmārama is home to approximately 300 permanent residents, though this number increases significantly during tourist seasons. The community's geographical isolation makes self-sufficiency particularly important during emergencies when external assistance may be delayed.

The generator project exemplifies remarkable community collaboration, bringing together the Ōmārama Emergency Management Group (comprising FENZ volunteers, Search and Rescue teams, and local police), the Residents' Association, and the local MenzShed. This partnership identified the critical need and developed a sustainable solution.



Ōmārama Residents' Association

Beyond emergency applications, the generator will significantly benefit the adjacent MenzShed facility, enabling members to operate power tools at full capacity and undertake more ambitious community projects. The MenzShed volunteers have committed to maintaining the generator and covering its running costs, demonstrating the project's long-term sustainability.

Jenni the Generator now stands ready - not just to provide electricity in times of need, but as a testament to what a determined community can accomplish through collaboration and shared purpose.

Thriving Children & Young People

Ka ora rawa atu ngā tamariki me ngā rangatahi



Play for All: Port Chalmers School Revitalises Play Space

Port Chalmers School | \$15,000 | Greater Dunedin

Port Chalmers School, with its rich 165-year history in the West Harbour community, is undertaking a significant playground renewal project that will benefit both students and the wider community. After more than a decade without new playground equipment, the school is addressing the critical need to replace ageing facilities.

The project focuses on installing new playground equipment specifically designed to accommodate children of varying ages and abilities, including those with differing learning and physical abilities. This inclusive approach ensures that all children can participate in active outdoor play, supporting both their physical development and mental wellbeing.

What makes this initiative particularly valuable is its community-wide impact. The Port Chalmers School playground serves not only its students but also functions as a recreational space for the entire West Harbour community. With its strategic location near the newly opened shared walkway and cycleway from Ōtepoti/Dunedin, the playground will provide a welcoming recreational stop for local whānau, visitors from cruise ships, and those exploring the area.

Importantly, ākonga (students) themselves have been actively involved in the planning process, providing input on the types of equipment they would most value and enjoy.

This playground renewal represents a community's commitment to providing quality recreational spaces for children and whānau across the West Harbour area.



Port Chalmers School

Sliding into Fun: Palmerston Playcentre Gets a Bouncy New Look

Palmerston Playcentre | \$20,000 | North Otago

Palmerston Playcentre has undergone a significant transformation of its outdoor playground area, creating a safer and more engaging environment for tamariki exploration and development. The comprehensive upgrade included replacing the old bark surface with ECE-certified pourable rubber surfacing, installing a Mini Zenith climbing web, and adding sensory panels to stimulate children's learning experiences.

The playground renovation reflects Playcentre's philosophy of child-led play and parental involvement in early childhood education. As tamariki spend considerable time outdoors at the Centre, this enhanced space has become an integral part of their learning journey, supporting physical development, risk assessment skills, and creative exploration.

The outdoor playground is the heart of the Playcentre experience. The upgrade ensures the provision of the highest safety standards while creating an inviting space that encourages children's natural curiosity and physical development.

Playcentre's unique approach to early childhood education actively involves whānau in their children's learning, creating a supportive community for parents and caregivers. This is particularly valuable for the Centre's rural families who travel up to 36km to attend, as well as for parents who benefit from the social connections and support network.

By investing in quality facilities that promote inclusive play, the Centre continues its mission of growing confident, resilient tamariki while strengthening community connections and wellbeing.



Palmerston Playcentre

Grants List

Kā Takuhe

Central Otago District	
Alexandra and Districts Youth Trust	\$45,000
Alexandra Blossom Festival Inc	\$6,000
Alexandra Child Care Centre Inc	\$3,070
Alexandra Community Advice Network Inc	\$2,500
Alexandra Miners Village & Riverside Park Trust	\$100,000
Alexandra Primary School	\$2,490
Alexandra Primary School Charitable Trust (COEC Ltd)	\$6,000
Central Otago A & P Association	\$3,500
Central Otago District Arts Trust	\$5,000
Central Otago District Council	\$540,000
Central Otago District Council - Rural Travel Fund	\$10,000
Central Otago District Council on behalf of the Central Lakes Health Services and Assets Project	\$15,000
Central Otago Friendship Network	\$5,000
Central Otago Group Riding for the Disabled Association	\$12,000
Central Otago Hockey Assn	\$18,000
Central Otago Hunt Inc.	\$3,240
Central Otago Pony Club	\$3,650
Central Otago Regional Choir	\$2,500
Central Otago Regional Orchestra	\$4,000
Chamber Music at the World's Edge Foundation	\$5,000
Clyde Primary School	\$525
Cromwell & Districts Community Trust	\$8,000
Cromwell Primary School	\$518
Cromwell Resource Centre Trust	\$20,000
Dunstan Arm Rowing Club Inc	\$5,410
Dunstan Equestrian Centre	\$60,000
Dunstan High School	\$2,963
Goldfields Primary School	\$840
Hāwea Playgroup Incorporated	\$5,000
Journeys Charitable Trust	\$15,000
Mainland South BMX Assn Inc	\$18,000
Māniototo Area School	\$450
Māniototo Rodeo Club Inc	\$4,000

Millers Flat Collie Dog Club	\$2,500
Millers Flat School	\$240
Ōmakau School	\$450
Pasifika Central Otago	\$1,000
Poolburn School	\$2,250
Ranfurly Volunteer Fire Brigade	\$20,000
Southern Ice Hockey League	\$2,000
Sticks n Stones Inc	\$5,000
Teviot Valley Resthome inc	\$5,000
The Bannockburn Community Centre Management Committee Inc	\$5,000
The Terrace School	\$1,550
Up-Cycles Charitable Trust	\$8,000
Upper Taieri Wai Incorporated	\$5,000
WoolOn Creative & Fashion Society Incorporated	\$10,000
Central Otago District Total	\$1,000,646

Clutha District	
Balclutha Bowling Club Inc	\$2,334
Balclutha Primary School	\$7,800
Blessed Box Charitable Trust	\$5,000
Catlins Medical Centre (2017) Ltd	\$10,000
Catlins Senior Citizens Club Inc	\$1,000
Clinton Community Pool Inc	\$4,852
Clutha Community Health Company Ltd	\$75,000
Clutha District Council - Aspiring Leaders	\$2,250
Clutha District Council - Rural Travel Fund	\$10,000
Clutha Parks Trust	\$32,000
Clutha Valley Primary School	\$15,450
Kaitangata Community Pool Committee Incorporated	\$160,000
Kaitangata Primary School	\$1,050
Kākā Point Bowling Club Inc	\$5,000
Lawrence Area School	\$50,000
Lawrence Chinese Camp Charitable Trust	\$200,000
Lawrence Summer Art Festival 2009 Inc.	\$5,000
Milton Area Promotions Inc	\$12,720
Milton Community Health Trust	\$4,000
Moanariri Crib Owners Association Incorporated	\$3,400
Mount Zion Church	\$3,000

Our Hut Heritage Hub	\$3,000
Ōwaka Going Forward	\$30,000
Romahapa Primary School	\$2,500
Rosebank Primary School	\$1,050
South Otago Agricultural & Pastoral Soc	\$5,000
South Otago High School	\$7,500
South Otago Historical Soc Inc	\$18,250
South Otago Theatrical Soc Inc	\$4,000
Special Olympics South Otago Trust	\$800
St Marys School Milton	\$1,950
Stirling School	\$375
Taieri Mouth Amenities Soc	\$3,800
Taieri Mouth First Response	\$1,000
Taieri Mouth Multisport Event	\$1,000
The Catlins Area School	\$2,100
Tokomairiro A & P Society	\$4,500
Tokomairiro High School	\$29,035
Warepa School	\$721
Clutha District Total	\$726,437

Dunedin City

Abbotsford School	\$1,350
Able - Southern Families Support	\$60,000
ADL	\$23,462
Age Concern Otago Inc	\$70,000
Alhambra/Union Rugby Football Club Inc	\$15,000
Alzheimers Disease and Related Disorders Society (ADARDS) Otago Incorporated	\$9,200
Amputee Society of Otago & Southland Inc	\$500
Andersons Bay School	\$4,000
Anglican Family Care	\$2,400
Aroha Ki Te Tamariki	\$80,000
Arthur Street School	\$85,600
Arts On Tour NZ	\$20,000
Athletics Otago Inc	\$48,000
Aukaha (1997) Ltd	\$10,000
Balmacewen Intermediate School	\$820
Basketball Otago Inc	\$60,000
Bathgate Park School	\$3,957
Bayfield High School	\$84,430
BIAS (Brockville) Charitable Trust	\$59,850
Big Steps Educare Inc	\$1,200

Blue Oyster Arts Trust	\$6,800
Bradford Primary School	\$975
Broad Bay Boating Club Inc	\$15,000
Broad Bay School	\$2,750
Brockville School	\$6,210
Business South Inc	\$69,000
Cancer Society of NZ Otago & Southland Inc	\$30,000
Cargill's Castle Trust	\$50,000
Castle Charitable Trust	\$6,500
Catholic Social Services	\$68,600
Caversham Baptist Church	\$7,000
Caversham Harrier & Athletic Club Inc	\$16,000
CCS Disability Action Otago Inc	\$18,000
Chairpersons Fund	\$4,100
Christ Loves All Nations	\$3,000
Citizens Advice Bureau - Dunedin	\$10,000
Coastal Otago Branch, New Zealand Tree Crops Association	\$3,000
Concord School	\$894
Cosy Homes Charitable Trust	\$350,000
Country Music Dunedin Awards (CMDA)	\$5,000
Daniel Belton and Good Company	\$4,125
Disability Information Service Inc T/A Livingwell Disability Resource Centre	\$30,000
Disabled Citizens Soc (Otago) Inc	\$10,000
Dunback Bowling Club	\$1,000
Dunedin Bird Club Inc	\$580
Dunedin Branch Pony Club	\$3,760
Dunedin Choral Society	\$8,000
Dunedin Christmas Charitable trust	\$5,000
Dunedin City Council - Chinese Cultural Week	\$9,000
Dunedin City Council - Puaka Matariki Celebrations	\$30,000
Dunedin City Petanque Inc	\$5,000
Dunedin Civic Orchestra Inc - T/a Dunedin Symphony Orchestra	\$287,963
Dunedin Community Accounting	\$2,500
Dunedin Concerto Competition	\$10,000
Dunedin Curtain Bank Trust	\$16,000
Dunedin Edinburgh Sister City Society Inc	\$6,000
Dunedin Fringe Arts Trust	\$86,500
Dunedin Grass Kart Club Inc	\$8,000

Dunedin Group Riding for the Disabled Assn Inc	\$20,000	Greater Green Island Community Network Charitable Trust	\$9,500
Dunedin Ice Skating Club Inc	\$15,000	Green Island School	\$4,778
Dunedin Jazz Foundation	\$17,000	Halfway Bush Kindergarten	\$10,000
Dunedin Marine Search & Rescue Inc	\$5,000	He Waka Kōtuia Trust	\$20,000
Dunedin Midwinter Celebrations Trust	\$20,000	Hiwa Navigation Ltd	\$10,000
Dunedin Multi Ethnic Council	\$5,000	Hope Church Dunedin Incorporated	\$1,000
Dunedin Netball Centre Inc	\$2,000	iD Dunedin Fashion Inc Soc	\$23,500
Dunedin North Intermediate School	\$2,765	Ignite Consultants	\$3,000
Dunedin North Shed Society Inc.	\$10,000	International Festival Environment Science Technology Dun NZ Inc	\$90,000
Dunedin Pakistan Society Inc	\$13,000	Kaikorai Grays Sport & Travel Inc	\$2,000
Dunedin Performing Arts Competitions Society Inc	\$3,500	Kaikorai Kindergarten	\$2,000
Dunedin Philippine Club Inc	\$13,000	Kaikorai Primary School	\$1,500
Dunedin Poultry Pigeon & Cage Bird Club	\$2,597	Kaikorai Rugby Football Club Inc	\$5,000
Dunedin Public Libraries Association (Friends of the Library)	\$2,500	Kaikorai Valley College	\$2,930
Dunedin Returned Services Choir	\$500	Karitane School	\$100
Dunedin Rudolf Steiner School	\$450	Kāti Huirapa Rūnanga ki Puketeraki	\$7,500
Dunedin Santa Parade Trust	\$16,000	Keep Dunedin Beautiful Committee	\$6,500
Dunedin Tai Chi Club Inc	\$3,840	Kings High School	\$2,590
Dunedin Tamil Society Inc	\$7,500	King's High School	\$37,500
Dunedin Tap Dancing Society	\$2,000	Kingslea School - Puketai	\$4,128
Dunedin Tracks Network Trust	\$105,000	Liberton Christian School	\$30,065
Dunedin Wildlife Trust	\$23,000	Life Education Trust Coastal Otago	\$15,000
Dunedin Workers Educational Assn Te Wāhi Ākoranga o Ōtepoti Inc	\$6,193	Life Matters Suicide Prevention Trust	\$5,000
Dunedin Writers and Readers Festival	\$5,000	Lions Club of Taieri	\$6,000
Dunedin Youth Orchestra Inc	\$8,000	Logan Park High School	\$16,195
East Otago Blokes Shed Soc Inc	\$5,065	Macandrew Bay Boating Club Inc	\$4,300
Eduk8 Otago	\$15,000	Macandrew Bay School	\$25,000
Elmgrove School	\$16,015	Māori and Pasifika Education Trust	\$25,000
Enabling Love New Zealand	\$3,500	Māori Hill School	\$670
English Language Partners Dunedin	\$2,600	Middlemarch Golf Club Inc	\$10,000
Fairfield School	\$21,160	Moana House - Downie Stewart Foundation	\$75,000
Fire in Ice Outrigger Canoe Club Inc	\$6,500	Mornington Kindergarten	\$3,500
First Presbyterian Church of Otago	\$23,500	Mosgiel Piping and Dancing Society	\$3,000
Football South	\$60,300	Music4Us Puoro Mō Taatou Music Education Trust	\$4,300
Free Wesleyan Church of Tonga in New Zealand	\$3,500	Northern Association Football Club Inc	\$1,800
Friends of Burns Reserve Trust	\$1,000	Northern Junior Association Football Club Inc	\$2,000
GASP! Dance Collective	\$4,588	NZ Chinese Assn, Otago & Southland Branch Inc	\$4,000
George Street Normal School	\$360	Orchard Naturist Club Incorporated	\$3,000
Golf Otago Inc	\$30,000	Orokonui Ecosanctuary Ltd	\$16,793
		Otago Academy of Sport Charitable Trust	\$35,000
		Otago Badminton Assn Inc	\$16,500

Otago Boys High School	\$37,680	Quarantine Island/Kamau Taurua Community Inc	\$5,780
Otago Country Music Club Inc	\$1,700	Queens High School	\$12,650
Otago Cricket Assn Inc	\$60,500	Ready & Steady Seniors, Mosgiel	\$1,000
Otago Fish & Game Council	\$2,900	Roslyn Wakari Association Football Club Inc	\$2,000
Otago Girls' High School	\$2,750	Royal New Zealand Plunket Trust	\$18,000
Otago Hockey Assn (1990) Inc	\$30,000	Royal NZ Pipe Band Assn - Otago Centre	\$4,301
Otago Medical Research Foundation Inc	\$80,000	Royal NZ SPCA Inc	\$7,300
Otago Mental Health Support Trust	\$4,950	Saddle Hill Foundation Trust	\$35,000
Otago Neighbourhood Support Charitable Trust	\$7,500	Samoaan Advisory Council	\$4,000
Otago Outdoor Education Trust	\$8,000	Sara Cohen School	\$80,428
Otago Polytechnic - Pacific Island Scholarships	\$10,000	Sathi Association	\$1,000
Otago Rowing Association Inc	\$30,000	Saturday Morning Music Classes (Dunedin) Soc Inc	\$3,939
Otago Rugby Football Union Inc	\$74,000	Save the Otago Peninsula (STOP) Society Inc	\$20,000
Otago Rugby League Inc	\$30,000	Sawyers Bay School	\$300
Otago Secondary Schools Sports Assn	\$30,000	SenseRugby NZ Trust	\$1,000
Otago Society for Music Education, operating as Music Education Otago	\$900	Short Film Otago	\$45,000
Otago Softball Assn Inc	\$10,000	Silver Peaks Country Music Club Inc	\$2,500
Otago Sports Car Club Inc	\$20,000	Silverstream South Primary School	\$1,230
Otago Table Tennis Assn Inc	\$5,000	Skeggs Foundation	\$47,900
Otago Tertiary Chaplaincy Trust Board	\$2,000	South Dunedin Community Network Inc	\$11,800
Otago Tongan Students Assn	\$3,500	South Dunedin Hall Trust	\$12,000
Otago Touch Assn Inc	\$48,200	Southern Heritage Trust	\$4,000
Otago University Sports Inc	\$3,000	Southern Youth Development	\$96,510
Otago Vintage Machinery Club	\$2,900	Sport Otago	\$175,750
Ōtakou Golf Club Inc	\$30,000	Sporting Chance c/- Sport Otago	\$25,000
Our Food Network Dunedin (OFN) Incorporated Society	\$6,000	Squash Otago Inc	\$25,000
OUSA Indian Students Assn	\$2,000	St Bernadettes School	\$900
OUSA Samoan Students Assn	\$1,000	St Clair Golf Club Inc	\$2,000
Outram School	\$1,546	St Clair School	\$4,605
Pacific Trust Otago	\$452,500	St Joseph's Cathedral School	\$4,000
Parafed Otago	\$25,000	St Leonards School	\$7,500
Parent to Parent - Otago Branch	\$5,000	St Marys School - Mosgiel	\$5,700
Pine Hill School	\$3,000	St Marys School Kaikorai	\$450
Pioneer Opportunities & Resources Trust	\$2,500	Stopping Violence Dunedin Inc	\$15,000
Port Chalmers Golf Club Inc	\$8,500	Straight Up Trust	\$40,000
Port Chalmers School	\$15,375	Strath Taieri Agriculture & Rural Tourism Trust	\$5,000
Portobello School	\$5,000	Strath Taieri Historical Society Inc	\$3,578
Puketeraki Limited	\$5,000	Strath Taieri School	\$150
Pūrakaunui School	\$405	SuperGrans Dunedin Charitable Trust	\$10,000
		Swing Riot Dunedin Inc	\$3,500

Tahuna Normal Intermediate School	\$10,910
Taieri Blokes Shed Society Inc	\$1,000
Taieri Christian Care Trust	\$5,000
Taieri College	\$5,425
Taieri Competitions Society	\$1,500
Taieri District Pony Club Inc	\$2,200
Taieri Network	\$3,500
Tainui School	\$1,170
Tamariki Together	\$60,000
Te Aho Paihere Inc	\$500
Te Hou Ora Whānau Services Limited	\$80,000
Te Mana Ahua Ake Charitable Trust	\$50,000
Te Roopu Tautoko Ki Te Tonga Inc	\$10,000
Te Rūnanga o Ōtakou	\$1,804,000
Te Whānau Arohanui Trust	\$30,000
Tennis Otago Inc	\$15,000
The Brain Injury Assn (Otago) Inc	\$5,000
The Rothesay News Inc	\$5,000
The Theatre in Health Education Trust	\$8,000
The Valley Project	\$25,000
The Waitati Music Festival Inc	\$10,000
The Work Opportunities Trust	\$9,000
Trinity Catholic College	\$68,528
Volleyball Otago	\$20,000
Volunteer South/Kaituao o te Taitonga	\$22,900
Waikouaiti Bowling Club Inc	\$1,500
Waiora Campsite & Training Centre (NZ Scout Assn)	\$108,000
Waitati School	\$900
Wakari Art Group	\$548
Wakari Cubs & Scout Group - Scout Assn of NZ	\$6,500
Wakari Kindergarten	\$977
Wakari School	\$595
Warrington Primary School	\$1,290
Warrington Surf Life Saving Club	\$300,000
Wellness Empathy Kindness Aotearoa Trust (WEKA)	\$5,200
West Harbour Arts Charitable Trust	\$2,500
WOW! Productions Trust	\$16,738
Youthline Otago Inc	\$65,000
YSAR Trust	\$31,000

Dunedin City Total **\$7,492,066**

Otago Wide	
Anxiety New Zealand Trust	\$5,000
Aphasia New Zealand (AphasiaNZ) Charitable Trust	\$3,500
Blue Light Ventures Inc	\$2,424
BMX New Zealand Incorporated	\$7,500
Catalytic Foundation	\$2,500
Chamber Music New Zealand Trust	\$10,000
Community Employment	\$28,600
Crohn's & Colitis New Zealand Charitable Trust	\$2,255
Daily Encourager Trust	\$2,250
Diabetes New Zealand	\$5,000
Eagles Golfing Society of Otago Inc	\$5,000
EECA (Energy Efficiency and Conservation Authority)	\$175,000
Epilepsy Association of New Zealand Inc	\$5,000
Gymnastics New Zealand	\$10,000
Hauora Taiwhenua Rural Health Network	\$15,000
He Waka Eke Noa Charitable Trust	\$8,000
Holocaust Centre of New Zealand Inc	\$500
IHC NZ Inc	\$5,000
Institute of Directors in New Zealand Inc	\$5,740
Kenzie's Gift Charitable Trust	\$3,000
Netball South Zone Inc	\$54,000
New Zealand Choral Federation Inc	\$4,000
New Zealand Council of Victim Support Groups Inc	\$10,000
New Zealand Endometriosis Foundation Charitable Trust	\$3,500
New Zealand Opera Limited	\$2,500
NZ Continence Assn Inc T/A Continence NZ	\$3,000
NZ Paramedic Education & Research Charitable Trust	\$1,475
Outward Bound Trust of New Zealand	\$105,000
Play It Strange Trust	\$13,000
Presbyterian Support Northern T/A Lifeline	\$10,000
Road Safety Education Limited	\$9,000
Rockquest Charitable Trust	\$8,000
Royal NZ Foundation of the Blind Inc	\$15,000
Salvation Army New Zealand	\$45,000

Shakespeare Globe Centre New Zealand	\$11,000
Show Me Shorts Film Festival Trust	\$4,524
Southland Triathlon and Multisport Club Inc	\$1,113
Special Olympics New Zealand	\$20,000
SPELD NZ	\$10,000
Stroke Foundation of NZ	\$27,000
Taki Rua Productions Society Inc	\$8,500
TalkLink Trust	\$5,000
Tangata Whenua Community and Voluntary Sector Research Centre Inc	\$8,000
Te Wāipounamu Riders Against Domestic Abuse Trust	\$5,000
The Boys' Brigade in NZ Inc	\$15,000
The CanInspire Charitable Trust	\$3,000
The Footnote Dance Trust Board	\$6,000
The National Foundation for the Deaf & Hard of Hearing Manatopu Incorporated	\$10,000
The Order of St John South Island Region Trust Board	\$50,000
The Student Volunteer Army Foundation	\$7,240
Tourette's Association of New Zealand	\$4,795
Untouched World Charitable Trust	\$6,500
Wellington Community Fund	\$50,000
YES Disability Resource Centre Services Trust	\$3,000

Otago Wide Total \$840,416

Queenstown-Lakes District	
Alpine Community Development Trust	\$30,000
Aspiring Beginnings Early Learning Centre Inc	\$15,650
Aspiring Gymsports Inc	\$5,000
Challenge Wānaka Sports Trust	\$12,764
Disc Golf Wānaka Inc	\$10,000
Good Bitches Trust	\$3,200
Hāwea Domain Board Inc	\$31,500
Kāhu Youth Trust	\$184,000
Lake Wānaka SouNZ Inc	\$8,951
Merino Muster Limited	\$6,000
Mint Charitable Trust	\$5,000
Mt Aspiring College	\$8,121
One New Zealand	\$25,000

QLDC - Rural Travel Fund	\$5,500
Rad Community Trust	\$2,700
Snow Sports NZ Inc	\$45,000
Southern Jet Sprints Club C/- Hammond Davidson Accountants	\$5,000
Southern Lakes Arts Festival Trust	\$89,940
Te Kākano Aotearoa Trust	\$1,129
Te Kura O Take Kārara	\$42,000
Tititea Performing Arts Trust	\$2,500
Upper Clutha Historical Records Society	\$15,000
Upper Clutha Tracks Trust	\$30,000
WAI Wānaka	\$15,000
Wānaka & District Lions Club Inc	\$35,000
Wānaka Arts Society	\$3,000
Wānaka Associated Football Club Inc	\$6,500
Wānaka Backyard Trapping Inc	\$11,300
Wānaka Croquet Club Inc	\$5,000
Wānaka Musicians Incorporated	\$5,000
Wānaka Primary School	\$10,280
Wānaka Rowing Club Inc	\$10,000
Wānaka Search and Rescue Inc	\$11,436
Wānaka Squash Rackets Club Inc	\$10,000
Wānaka Yacht Club Inc	\$3,500
Wheels at Wānaka Charitable Trust	\$10,000
Winter Games NZ Charitable Trust	\$10,000
Queenstown-Lakes District Total	\$729,971

Waitaki District	
26 Squadron Air Training Corp Ōamaru	\$6,400
Ardleigh Golf Club Inc	\$8,000
Awamoa Bowling Club Inc	\$3,000
CCS Disability Action Waitaki Inc	\$10,000
East Otago High School	\$14,580
Excelsior Rugby and Associated Sports Club	\$1,500
Harbour Street Jazz Inc	\$15,000
House of Breakthrough Trust Ōamaru	\$30,000
Janet Frame Eden Street Trust	\$23,500
Kakanui School	\$57,900
Lower Waitaki Golf Club Inc	\$17,500
Maheno Bowling Club Inc	\$1,600
Maheno School	\$9,829
North Otago Netball Centre Inc	\$8,500

North Otago Rugby Football Union Inc	\$29,200
North Otago Sports Bodies Assn Inc	\$1,500
NZ Special Olympics Lower South Island Regional Council	\$5,000
Ōamaru Combined Churches Christmas Parcels Trust	\$2,000
Ōamaru Poultry Pigeon & Canary Society	\$600
Ōamaru Rowing Club Inc	\$4,000
Ōamaru Tongan Methodist Parish	\$6,589
Ōamaru Victorian Heritage Celebrations	\$8,000
Otematata Residents Assoc Inc	\$9,000
Palmerston Playcentre	\$20,000
Palmerston Primary School	\$1,410
Papakaio School	\$1,300
Pound Paws Rescue	\$4,650
Residents Association Ōmārama Inc	\$10,000
Scott's Own Sea Scouts	\$8,000
Steampunk NZ Trust	\$8,000
Te Hā o Maru Health and Social Services	\$5,000
The North Otago Lawn Tennis Association Incorporated	\$4,300
Waitaki Boys High School	\$6,350
Waitaki Community Recreation Centre Trust	\$80,000
Waitaki District Council - Aspiring Leaders	\$2,161
Waitaki District Council - Community Events	\$10,000
Waitaki District Council - Rural Travel Fund	\$10,000
Waitaki Endurance & CTR Club Inc	\$8,700
Waitaki Girls High School	\$364
Waitaki Summer Music Camp	\$3,330
Waitaki Valley Community Society Inc	\$3,175
Waitaki Whitestone Geopark Trust	\$115,000
Weston School	\$1,218
Youthtown Incorporated	\$4,179
Waitaki District Total	\$580,335

Total Grants Approved 2024/25	\$11,369,871
Less Grant Writebacks	\$227,488
DCC Arts Capability Reimbursement	\$4,789
	\$11,137,593



Financials

Rauemi Pūroko Ahumoni

Summary consolidated statement of service performance

For the year ended 31 March 2025

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.

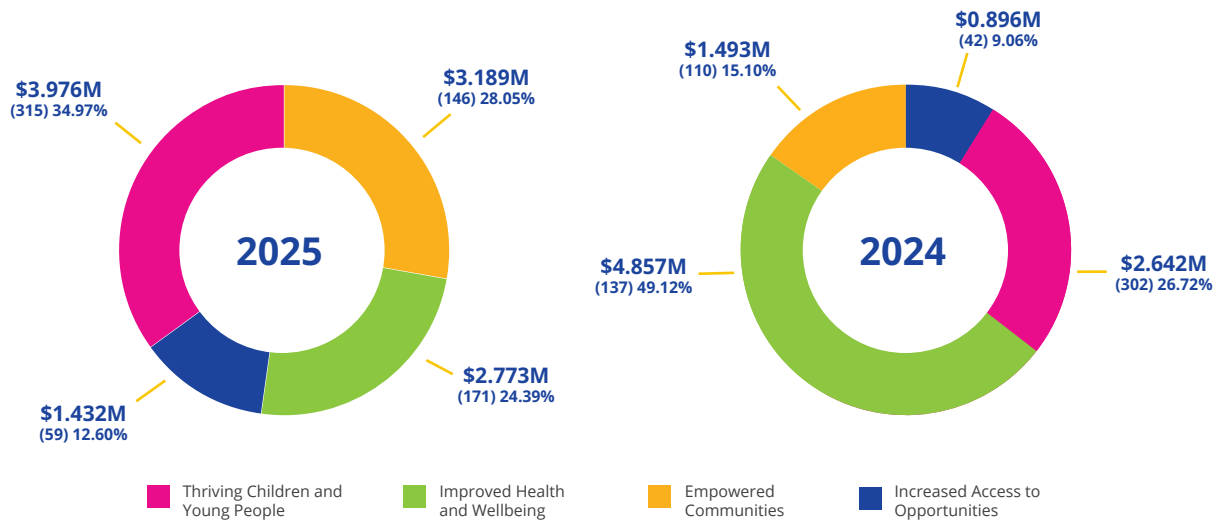
The Otago Community Trust has its origins in the Dunedin Savings Bank, established in 1864 by public spirited citizens seeking to encourage thrift within the community, and distribute surplus profits to charitable causes.

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

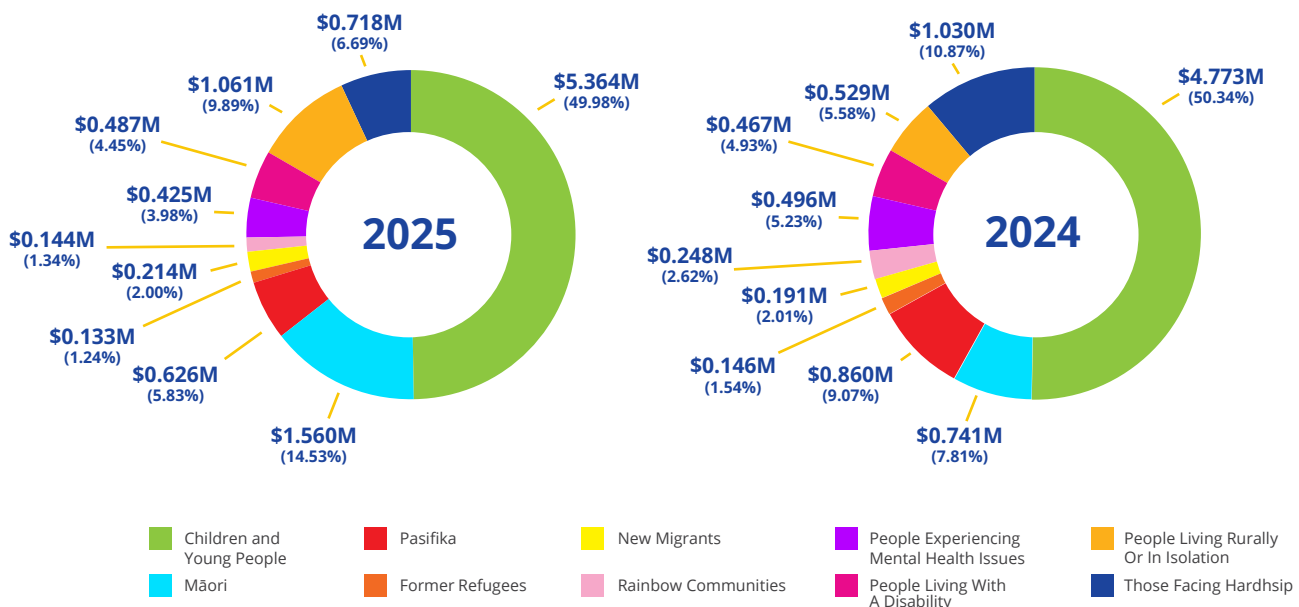
In 2025 we approved 691 grants totalling \$11.37 million (2024: 591 grants totalling \$9.89 million).

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



How Have We Performed?

94% of grants supported priority communities, those most vulnerable (2024: 96%):



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 2025

Trustees

Andrew Kilsby	Cromwell
Carole Adair	Dunedin
Alofa Lale	Dunedin
Rachel Bird (Appointed January 2025)	Dunedin
Jeremy Chang (Appointed January 2025)	Dunedin
Stacey Honeywill (Appointed January 2025)	Ōamaru
Barbara Long	Dunedin
Fraser McKenzie (Resigned March 2025)	Ōamaru
Robyn McLean	Dunedin
Michael Stevens	Dunedin
Bridget Tweed	Waitahuna
Raewyn van Gool	Cromwell
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 2025
in New Zealand Dollars (\$000's)

	2025	2024
Gains/(losses) from investments	17,354	34,411
Expenditure	(1,431)	(1,214)
Surplus / (Deficit) before grants	15,923	33,197
Grants approved during the year*	(11,138)	(9,683)
Other gains/(losses)	(2)	-
Surplus / (Deficit) before taxation	4,783	23,514
Income tax (expense)/refund	-	-
Surplus / (Deficit) for the year	4,783	23,514
Other comprehensive revenue and expenses	-	-
Total comprehensive revenue and expenses for the year	4,783	23,514

*after writebacks

Summary consolidated statement of changes in trust funds

For the year ended 31 March 2025
in New Zealand Dollars (\$000's)

	2025	2024
Total trust funds at the beginning of the year	308,367	284,853
Plus total comprehensive revenue and expenses for the year	4,783	23,514
Total trust funds at the end of the year	313,150	308,367

Summary consolidated statement of financial position

As at 31 March 2025
in New Zealand Dollars (\$'000's)

Assets	2025	2024
Cash and cash equivalents	464	438
Other current assets	65	61
Total current assets	529	499
Other investments	318,747	313,557
Property, plant and equipment	1,475	1,399
Total non-current assets	320,222	314,956
Total assets	320,751	315,455
Liabilities		
Trade and other payables (including grants)	6,178	6,625
Total current liabilities	6,178	6,625
Trade and other payables (including grants)	1,423	463
Total non-current liabilities	1,423	463
Total liabilities	7,601	7,088
Net assets / Trust Funds	313,150	308,367

Approved on behalf of the Trustees



Andrew Kilsby
Chairperson
22 July 2025



Carole Adair
Trustee
22 July 2025

Summary consolidated statement of cash flows

For the year ended 31 March 2025
in New Zealand Dollars (\$'000's)

	2025	2024
Net cash outflow from operating activities	(11,844)	(10,262)
Net Cash from/(used) in investing activities	11,870	9,999
Net cash from/(used) in financing activities	-	-
Net (decrease)/increase in cash and cash equivalents	26	(263)
Cash and cash equivalents at 1 April	438	701
Cash and cash equivalents at 31 March	464	438

Notes to the summary consolidated financial statements

For the year ended 31 March 2025

These are the summary consolidated financial statements of Otago Community Trust (the "Trust") for the year ended 31 March 2025. The specific disclosures included in these summary consolidated financial statements have been extracted from the full annual consolidated financial statements dated 22 July 2025. The full annual consolidated financial statements were approved for issue by the Trustees on 22 July 2025 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 2025. A copy of the full Trust consolidated financial statements for the year ended 31 March 2025 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 22 July 2025.

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's 100% owned subsidiary Fillmor House Limited obtained charitable status on 31 March 2017, income derived from this date forward is exempt from income tax.

Events after the reporting period

No events have occurred subsequent to year end that significantly affect the operations of the Trust (2024: None).



Independent Auditor's Report on the Summary Consolidated Financial Statements

To the Trustees of Otago Community Trust

Opinion

The summary general purpose consolidated financial report of Otago Community Trust (the 'entity' comprises the summary consolidated financial statements on pages 28 to 30 and 20 to 26 and the summary consolidated statement of service performance on pages 27 to 28. The complete set of summary consolidated financial statements comprises the summary consolidated statement of financial position as at 31 March 2025, and the summary consolidated statement of comprehensive revenue and expense, summary statement of changes in net funds and summary cash flow statement for the year then ended, and related notes. The summary consolidated financial report is derived from the audited general purpose financial report of the Group for the year ended 31 March 2025.

In our opinion, the accompanying summary consolidated financial report, on pages 27 to 30 and 20 to 26, is consistent, in all material respects, with the audited general purpose financial report, in accordance with PBE FRS 43: Summary Financial Statements issued by the New Zealand Accounting Standards Board.

Summary consolidated financial statements

The summary consolidated financial statements do not contain all the disclosures required by Public Benefit Entity Reduced Disclosure Regime. Reading the summary consolidated financial statements and the auditor's report thereon, therefore, is not a substitute for reading the audited consolidated financial statements and the auditor's report.

The audited consolidated financial statements and our report thereon

We expressed an unmodified audit opinion on the audited consolidated financial statements in our report dated 22 July 2025.

Trustees' responsibilities for the summary consolidated financial statements

The Trustees are responsible on behalf of the Group for the preparation of the summary consolidated financial statements in accordance with FRS-43: Summary Financial Statements.

Auditor's responsibilities

Our responsibility is to express an opinion on whether the summary consolidated financial statements are consistent, in all material respects, with the audited consolidated financial statements based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) ('ISA (NZ)') 810 (Revised): *Engagements to Report on Summary Financial Statements*.

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

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
22 July 2025

Up-Cycles Charitable Trust: Rangatahi Bike Ambassador Programme Empowers Local Youth

Amount Granted | \$8,000 | Central Otago

The Central Otago community has embraced an innovative youth-led cycling initiative this year through the Rangitahi Bike Ambassador Programme. In partnership with six local kura (schools) - Alexandra Primary, The Terrace, Clyde Primary, St Gerard's Primary, Dunstan High, and Cromwell College - Up-Cycles has successfully integrated cycling programmes into physical education curricula across the region.

Forty young ambassadors have been equipped with comprehensive cycling skills and leadership training, enabling them to lead bike skills sessions within their schools and broader community. This peer-led approach has significantly increased student engagement in outdoor physical activities.

A cornerstone of the programme has been the Peak Safety Outdoor First Aid Training, providing ambassadors with essential safety skills and formal accreditation. This training ensures our young leaders can confidently and safely guide their peers during cycling activities.

The programme continues to deliver outstanding outcomes: enhanced skill development, increased outdoor learning opportunities, and growing cycling participation rates among local youth, contributing to healthier, more active lifestyles throughout Central Otago.



RampUp Community Project: Building Belonging Through Skateboarding

RAD Community Trust | \$2,700 | Queenstown Lakes

The RAD Community Trust's vision took a significant step forward this year with the installation of a community skate ramp at Paetara Aspiring Central, as part of the broader RampUp Community Project. This innovative facility serves as more than just recreational equipment - it's a vibrant hub fostering inclusivity, skill development, and community connection.

The supervised environment ensures skateboarders of all abilities feel welcome and supported, removing barriers that often intimidate newcomers. Particularly groundbreaking are the adaptive skateboarding features which include specialised rails, harnesses, and visual contrast elements for those with low vision.

The project brings people together from across the community - from tamariki and rangatahi developing physical skills and confidence, to whānau building connections, and partner organisations like MINT Charitable Trust and Kāhu Youth Trust, expanding their outreach by sharing the joy of skateboarding.

Image: Deanna Gerlach

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www.oct.org.nz

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