



**Community  
Trust South**



TE POU ARATAKI POUNAMU O MURIHIKU

2020 Annual Report



## Message from the Chair

It is my pleasure to present the 2019/20 Chair's report having been appointed as Chair in May 2020.

At the time of writing this we have been involved in a time of change with the arrival of Covid-19 into our country. All our communities have been impacted and the ripple effects from this will have an effect on our investments and grants now, and in the future. The Trust has continued to grant during this period with the focus being on ensuring our communities are well supported and our funds are put to the most effective use.

The staff at Community Trust South had been actively moving some of our processes and practices online during the year and the need to move into running the business of Community Trust South offsite was a credit to the staff's learning and their agility to move and adapt. We are fortunate to have such a dedicated and capable team led by our General Manager, Jackie Flutey.

A continuing theme in 2019/20 has been the development of new ideas and practices. The investment loan to the Invercargill Inner City Development was an important piece of work to undertake, given that it is an impact investment which will support a social need alongside generating an investment return.

Also, during the year time was spent extending the boundary of the Trust to include Milford Sound. This was a collaborate effort with Otago Community Trust and while it has taken time to go through the approval process this was completed in the 2020/21 year.

As we move forward, we are also mindful to review our practice and consider whether it needs to be modified. This year we conducted a review of multi-year funding, we identified that this funding helps provide flexibility and stability which supports organisations to operate effectively and to develop leadership capacity. We are confident that this aspect of our granting is meeting a specific need for many groups.

As a Community Trust it is important that we are inclusive of all the communities in our area. At the Board

table we are always keen to ensure that our focus is on this. This year we had Board meetings in Tuatapere, Lumsden and Te Anau. These opportunities helped Trustees understand the communities, meet local people, and observe the impact the support of Community Trust South had on their communities.

Our Principal's Discretionary Fund's aim is to reduce barriers to learning. A recent quote received from a Principal says: "this money is absolutely making a difference in our kid's lives." This is the only accolade the Trustees need – to know that our support changes lives.

We can look back on the 2019/20 financial year as a period where we repositioned our Trust for the future. While this has certainly been a challenging year with the Trust achieving a negative return, given the circumstances with Covid-19 we accept the result. In line with the Trust's Statement of Investment Policies and Objectives, the Trust can expect to see a negative return one year in every five on average given the perpetual nature of the Trust.

I wish to acknowledge the work of my fellow Trustees and in particular the two Trustees who carried out their duties diligently in 2019/20 and finished their terms in September 2020; Penny Simmonds and Richard Wason. As our past Chair, Penny led many parts of the initiatives outlined in this report. I take this opportunity to publicly thank Penny for her outstanding leadership during her time in the role of Chair and acknowledge the significant changes she made to enhance the operations of the Trust over the eight years she has served. Richard has also served on the Trust for eight years only missing one Board meeting and he has actively worked hard to ensure that the Community Trust benefits all the communities it serves. We welcome Kirsty Pickett and Louise Fowler as new Trustees, replacing Penny and Richard.

Ngā mihi



Trish Boyle  
Chair

## Our Trustees



**Penny Simmonds**  
Past Chair  
(Retired September 2020)



**Trish Boyle**  
Present Chair



**Lindsay Wright**  
Deputy Chair



**John Wyeth**



**Mata Cherrington**



**Bill Moran**



**David Goble**



**Michael Wilson**



**Stephen Canny**



**Richard Wason**  
(Retired September 2020)



**Louise Fowler**  
(Appointed September 2020)



**Kirsty Pickett**  
(Appointed September 2020)

## Our Strategic Vision

Our vision as a community funder is for the south to thrive. Our strategic vision provides the framework which Trustees use to make their granting decisions and outlines the direction the Trust takes for investing in our community.

Underpinning all that we do is our commitment to the Te Tiriti o Waitangi. We are committed to working in partnership with iwi, hapu, whānau and Māori communities to support their aspirations.

Four strategic pou (pillars), each with a related set of funding priorities, form the foundation of our vision. Our focus is on people, partnerships, participation and places and we seek to look at new innovative approaches, solutions and ideas that can help to create positive change in the Community Trust South region.

### STRATEGIC FOCUS – COVID-19

We continue to fund to our strategic vision concentrating our focus on the most critical priorities (identified as higher, medium, and lower priority) and supporting people and communities most impacted by Covid-19.

As we work with our community to reactivate, build resilience and to build back better so they can thrive, we will focus on; enhancing the capacity and capability of organisations to work in new ways, to partner and collaborate, and to explore change for good opportunities. Our approach will focus on equity and so we recognise different approaches and resources will be required to achieve equitable outcomes. We also understand that key to a thriving region post Covid-19 will be ensuring social and economic recovery.



Health, Wellbeing  
& Active Lifestyles



Community Development  
& Community Economic  
Development



Education



Arts, Heritage  
& Culture

## The Year in Numbers

### TOTAL INVESTMENTS

**\$219 million**

(excludes loans & advances)

### INVESTMENT RETURN

**-1.4%**

### FUNDING APPROVED SINCE ESTABLISHED IN 1988

**\$203 million**

### FUNDING APPROVED 2019-20

**\$7.8 million**

#### Grants:

\$7,697,473

#### Scholarships:

\$65,687

### FUNDING APPROVED BY POU (PILLAR)



**43.7%**

Health, Wellbeing & Active Lifestyles

\$3,388,683



**23.9%**

Community Development & Community

Economic Development

\$1,857,641



**16.7%**

Education

\$1,295,175



**15.7%**

Arts, Heritage & Culture

\$1,221,661

### FUNDING BY AREA

● All of Community Trust South Area	\$1,777,124
● All of Southland	\$1,783,874
1 Western Southland	\$334,055
2 Fiordland	\$763,452
3 Wakatipu	\$659,686
4 Northern Southland	\$207,593
5 Central Southland	\$193,031
6 Invercargill & Bluff	\$1,156,829
7 West Otago	\$41,353
8 Eastern Southland	\$676,732
9 Southern Southland	\$106,417
10 Stewart Island	\$63,014

**\$7,763,160**



## HEALTH, WELLBEING & ACTIVE LIFESTYLES

Working with communities to ensure people participate, are supported, empowered and cared for.



### EDUK8 - RIGHT TRACK

Right Track changes people's lives. This nationally and internationally recognised driver offender rehabilitation programme has been successfully delivered across NZ since 2007 and was introduced into Southland in 2018/19. Programme creator John Finch has been instrumental in the success of the initiative and has recruited local personnel including representatives from the Court, DHB, Justice Department, Police, Fire & Emergency NZ and St John to contribute to the programme. Right Track utilises a combination of interactive learning strategies with cognitive behavioural learning therapy providing participants with an opportunity to engage, learn, and take on board messages enabling them to make wiser choices. It is an intense, emotional, educational, and active learning programme that takes participants on a journey of discovery.

The District Courts, NZ Police and the community identified the need for an effective programme to address the issues associated with aberrant driver behaviour. The increasingly concerning trend of serious and fatal crashes and driver offending indicates that high risk behaviour is endemic in communities. The Right Track is a nationally and internationally recognised programme that addresses driver behaviour.

“There are numerous anecdotal accounts from learners and supporters explaining how their lives have changed, how their relationships have improved, how their future is now so much brighter, how they have stopped friends and work colleagues from driving drunk and how they are spreading the messages throughout their own communities. Participation in Right Track has an enormous resultant ‘ripple effect’ with participants not only understanding the impacts of their own actions in terms of driving but in life in general. They share this knowledge with their family, friends and wider community.”- John Finch

Right Track is, “impacting, life changing, eye opening and mind blowing. It opened our eyes and made us think not just about ourselves but other people's lives” – Right Track Participants

Twelve months after the inaugural programme only two participants have reoffended, a ninety percent success rate. Several learners have become involved in subsequent programmes as mentors and in the upcoming programme three of the guest speakers in the first session will be previous learners who now want to share their stories and encourage others to change.



## EDUCATION

Working with communities to ensure every person has the opportunity to achieve their potential.



### LEARNING DIFFERENCES AOTEAROA TRUST

Learning Differences Aotearoa Trust promotes acceptance and understanding of learning differences that affect children and adults, to enable and support their personal growth to reach their full potential. This is achieved by providing specific tools, resources and strategies, which encourage self-belief and acceptance of who they are and their place in the community.

At the core of Learning Differences Aotearoa Trust is Chris Cole, LD Advisor, whose lived experience, knowledge, and ability to connect with people with learning differences makes her skill set unique which is a significant point of difference to what the Trust offers. Dyslexia Support Southland – a support group for parents and whānau of children with learning differences started 10 years ago and came under the Trust’s structure when it was established in 2017. The Trust has also introduced new programmes such as Growing Stars – a children’s workshop and Adult Dyslexia Support Southland – a support group for adults with dyslexia. Professional development is another focus of the Trust providing specialised training and education on dyslexia and learning difficulties to teachers at schools throughout the South.

Operational funding from Community Trust South provides a platform on which the organisation is able to pursue its mission.

“Funding from Community Trust South is everything. It provides a base from which we can structure our Trust. It means we can provide free unbiased resources for the community. When a child has been identified as needing assistance or a family comes to us asking for help, navigating the right path can often be overwhelming. At Learning Differences Aotearoa, we can provide them with information in a professional manner that allows the family and child to choose the assistance and support that best suits their needs. Our aim is to provide honest support and advice. Dianne (Community Trust South Grants Manager) has supported us and believed in what we do from the start and that means so much to us.” - Chris Cole, Learning Differences Aotearoa Trust

Success for the Trust has come in different forms, from children understanding that it doesn’t mean they are not smart and dealing with the emotional impact of realising they simply think differently - to adults who have found their depression ‘went away’ after identifying as dyslexic and feeling the support the adult support group offers.



Chris Cole - Learning Differences Aotearoa Trust

## ARTS, HERITAGE & CULTURE

Working with communities to ensure people participate, celebrate, and preserve our arts, heritage and culture.



### MĪHARO – CENTRAL LAKES POLYFEST

Polyfests celebrate cultural diversity, provide a sense of identity and are a catalyst for understanding and acceptance, with Central Lakes Polyfest, being a shining example.

Mīharo (formally Murihiku Maori and Pasifika Cultural Trust) was able to use their experience of establishing and running their iconic and highly successful Murihiku Polyfest for over 11 years to introduce Polyfest to the Central Lakes area. Up until 2018 schools had to travel to Invercargill to participate in the Murihiku Polyfest. This highlighted the need for an event to be organised in the Central Lakes area, and the response has been overwhelming. Now in its second year, the uptake in performances and participants has grown significantly. Mīharo aims to grow the event and involve more local volunteers from the Central Lakes area so it becomes an event for the community by the community.

“We want students to feel empowered to perform and to feel pride in culture. We know the individual and community benefits Polyfest brings and we want to extend this opportunity to as many children and young people as we can. We appreciated the support from the Trust for the inaugural event and continuing to support us as we grow the event in this region.” – Mandy Smith, Mīharo

While having the same number of groups perform in the second year, the number of individual performers rose from 600 to 1100 which shows the passion and reach for cultural knowledge and experiences are continuing to rise. This impact goes beyond the school to whānau and the wider community as they help with practices, creating uniforms and holding celebration nights. The audience was over capacity at times over the two day event. Some whānau showed their support with a haka tautoko reinforcing their pride in their children’s performances.

“We were blown away with the level of performances and the new waiata and haka that have been written. We spoke with teachers who told us how kapa haka has become a cornerstone of their schools and they are seeing culture being celebrated and shown not just at Polyfest time but throughout the year.” – Mandy Smith, Mīharo



Central Lakes Polyfest

## COMMUNITY DEVELOPMENT & COMMUNITY ECONOMIC DEVELOPMENT



Working with communities to ensure they are connected, successful, resilient and dynamic.

### SOUTHERN REAP - DRIVE MY LIFE

Drive My Life – Taraiwa Mataora is a community mentoring driver licencing programme, delivered by Southern REAP, to the vulnerable members of the Invercargill and Southland communities. It teaches the necessary knowledge and skills needed to obtain a learner, restricted and/or full driver licence, reducing the number of unlicensed drivers on our roads. It also provides exposure to best practice through access to Road Safety tools and resources e.g. NZTA/ACC Drive Toolkit.

NZTA's communities at risk register identifies Invercargill city and Southland district as high risk areas for young drivers, with Invercargill city being rated as the highest risk nationwide. Within the youth driver group there is a high level of licence breaches with access to resources and the support required to progress through the Graduated Licensing System often being a barrier.

Southern REAP have been delivering educational opportunities to our rural communities in order to make a difference to people's lives for 38 years and the Drive My Life programme fits well. Police, Road Safety Southland and ACC began the programme in 2017 with a small group from MYPLC (Murihiku Young Parent Learning Centre). Officially launching in 2019, Drive My Life has established itself as a successful programme and now works on a referral basis from many organisations and groups such

as, but not limited to, the Department of Corrections, IWI Community Panel and the Ministry of Social Development.

2019 saw the programme delivered to 180 participants with a growing waiting list of over 170 – exceeding budgeted numbers. There is a clear need for this programme to grow and develop throughout the entire Southern region.

Police have successfully used the programme as an alternative pathway to try and keep people out of the justice system which led to Drive My Life being named as a semi-finalist at the National Evidenced Based Policing Awards in 2019.

“The success of the Drive My Life programme extends beyond the participant obtaining their full driver licence. The individuals are equipped with increased knowledge of the road rules, receive professional instruction and complete a defensive driving course, giving them the tools needed to be much safer drivers on our roads.” - Jonelle McDowall, DML Manager

Community Trust South has a focus on creating a “positive change for our people” and Drive My Life epitomises this. Offering a pathway where people can obtain a driver licence is a life changer for many. Self-esteem rises, job opportunities open up, a qualification is obtained and the risk of getting immersed in our criminal justice system lessens.



Drive My Life

## CREATE SCHOLARSHIP

Creating opportunities for emerging and established creative practitioners across all art forms.

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### EMMA JONES – NEW ZEALAND SECONDARY STUDENTS CHOIR

Emma has a passion for music which is backed by an immense amount of talent. At 18 years old Emma has already built an impressive singing career over the last 13 years including being named the 2014 ILT Southland Junior Entertainer of the Year and attaining a 2020 Youthmark Award. Emma has performed for former Prime Minister John Key and the Governor General Dame Patsy Reddy, as well as having sung alongside national and international artists including Dame Malvina Major. Locally Emma has featured in numerous community events and functions including the ILT Christmas Variety Show and Carols in the Park.

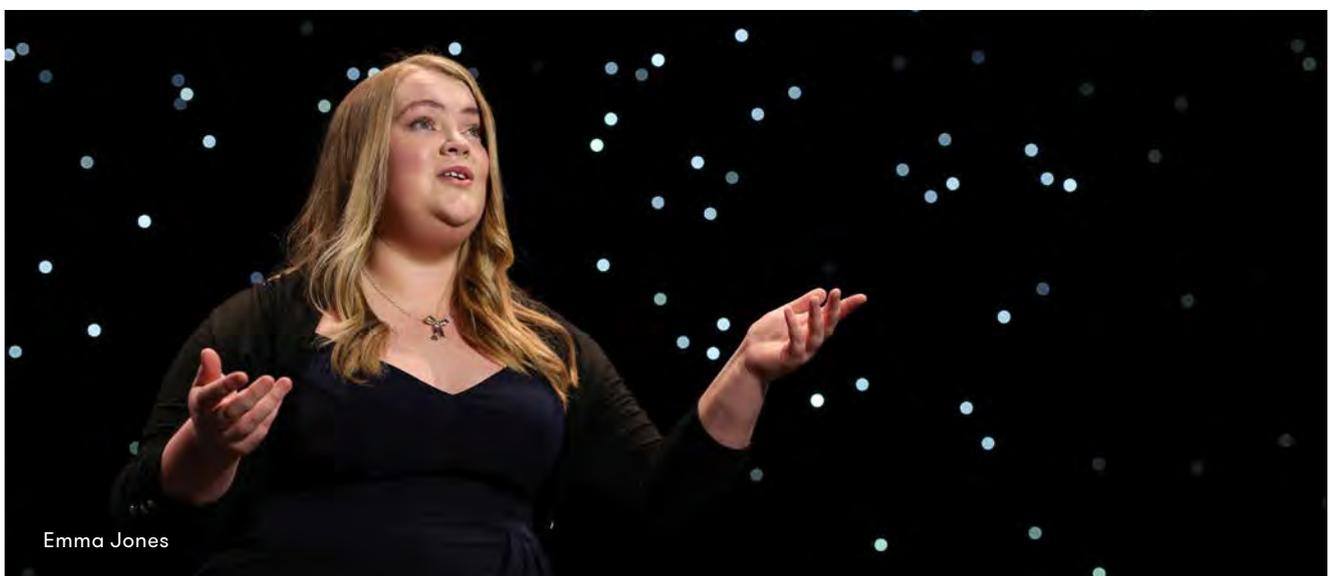
Selected as one of 56 of the country's finest young voices in the 2019/2020 New Zealand Secondary Students Choir, Emma is the only representative from the Southern region. The choir provides Emma with the opportunity to extend her choral excellence as well as developing her leadership capability in the New Zealand art sector, with many of New Zealand's top professional artists having been past members of the choir.

As part of the choir Emma performs in competitions, concerts and festivals nationally and internationally. Being a member means being committed to practicing and travelling nationally to rehearsals, tuition and

master classes on technique and performance opportunities.

“The generous backing and support I’ve received from Community Trust South and the Invercargill community has helped with costs in being able to meet the choir commitments and courses. This has inspired me to develop my passion further and enabled me to focus and grow as a national performer.” – Emma Jones

Success for Emma, other than being recently selected as a reserve to the NZ Youth Choir, has been experiencing the most wonderful sounds when performing as a full choir and having soloist opportunities. Emma was selected as a soloist for two of the choirs’ repertoire when performing to a full house at St Paul’s Cathedral in Dunedin, St Mary’s Church in Timaru and St Marys Pro-Cathedral in Christchurch. Her favourite was singing The Catacombs by the NZ composer, William Yaxley. “I got to perform my solo in the pulpit at three concerts which added extra mood to the performance.” - Emma Jones



Emma Jones

## HEALTH, WELLBEING AND ACTIVE LIFESTYLES

Working with communities to ensure people participate, are supported, empowered and cared for.



### THE STEWART ISLAND PROMOTION ASSOCIATION – INAUGURAL RAKIURA CHALLENGE

New Zealand’s southern-most trail run - Rakiura Challenge traverses 32km through Rakiura National Park starting at Horseshoe Bay and finishing in the centre of Oban. Event participants take in the historic Māori trails, colonial logging sites and spectacular bush and beaches over the single day event.

The inaugural Rakiura Challenge sold out within four hours with 250 participants signing up for the challenge. Race day saw over 400 people travel to the Island for the event, doubling the entire population of the Island.

The Challenge is organised by the Stewart Island Promotions Association (SIPA) which promotes the Island as a place to visit, live and work and to help retain the Islands heritage and natural history. The core organising committee for the inaugural Rakiura Challenge, chaired by Aaron Joy, was well supported by the local community including DOC who has given a 10 year concession for the event to traverse the National Park. The remoteness of Stewart Island presented some challenges including limited accommodation and catering capacity however the resourcefulness of locals combined with specialist volunteers helped to ensure these challenges were overcome.

“With the number of competitors/supporters visiting the Island race organisers had to think outside the square on how we would feed everyone over the two days. SIT Hospitality students were approached to see if they would undertake work experience catering for the race. This proved so successful that SIT have locked in their students for the next race as well. The Southland tramping group was also approached to undertake marshal duties on race day around the Rakiura Track. After the success of the inaugural Rakiura Challenge, the Rakiura Great Walk will now become a great run.” – Aaron Joy

SIPA see the event as having potential to promote the Island as a tourist destination while benefitting local businesses and community groups. With the success of the inaugural challenge, and the 2020 event already sold out, the Rakiura Challenge is well on its way to being one of New Zealand’s great runs.



## EDUCATION

Working with communities to ensure every person has the opportunity to achieve their potential.



Community Trust South provided total funding of \$589,357, to all 95 primary, intermediate and secondary schools in the Trust's area through the Principals Discretionary Fund (PDF). Its aim is to ensure every student has the opportunity to achieve their potential through:

- enabling students experiencing financial hardship to participate in school activities
- supporting schools to raise student achievement, address inequalities and/or reduce barriers to participation across specific education, sport, art and culture priorities of the Trust
- enabling schools and students in isolated areas to have equity of opportunity to take part in educational, sporting and cultural opportunities

An example of how some schools use this funding:

11 primary schools collaborated and are using part of their PDF allocation to employ a Central Sports Coordinator with the aim to increase physical activity and sports participation rates among all Central Southland primary schools.

“In all schools there is someone who is ‘in charge’ of sport. The Central Sports Coordinator supports these roles by coordinating inter-school sport, e.g. cross

country, athletics and creates opportunities for children across the central region to be involved in sport. The role has helped to achieve effective relationships and strong communication lines regarding the sporting opportunities available for all schools.” – Steve Wadsworth, Winton School

The Coordinator is able to access opportunities that otherwise may not have been available to schools, in particular, the smaller country schools in the area. An example of this is combining students from two smaller schools to create a full sports team. More opportunities have meant more children trying out a new sport and being a part of a team.

Some events and initiatives the Coordinator has organised include zone athletics, cross country, central cup, year 7/8 basketball, year 5/6 mini ball, Monday night hockey and basketball referee development which has resulted in higher levels of engagement and participation.

“We have continued with this project because of some excellent results over the past couple of years. These were a result of children being exposed to opportunities that they may not have had access to prior. Feedback from children, staff and whānau has been overwhelming.”

– Steve Wadsworth, Winton School



Brenda Mee - Central Sports Coordinator

## ARTS, HERITAGE & CULTURE

Working with communities to ensure people participate, celebrate, and preserve our arts, heritage and culture.



### WAIHOPAI RUNAKA – HOSTING HUI-A-IWI

“Ka Tū Te Tītī – the return home”

Te Rūnanga o Ngāi Tahu held their bi-annual Hui-ā-Iwi in Invercargill from 22-24 November 2019. This is a three-day event dedicated to all things Ngāi Tahu – it is a celebration of whanaungatanga and Ngāi Tahutanga; about remembering and connecting as iwi, hapū and whānau. In 2019 this was hosted by the four rūnaka of Murihiku Southland, Awarua, Oraka-Aparima, Waihopai and Hokonui. Hui-ā-Iwi is also a way for whānau to kōrero with the Te Rūnanga leadership group in the open forum and to hear leaderships report back on the Annual Report.

Having four rūnaka working collaboratively together on such a large event was a first for the iwi, with event management by Mīharo Murihiku. Held at ILT Stadium whānau ‘returned home’ from all over Aotearoa, from Australia, and from even further away, with attendee numbers peaking at 3,500 on day 2; with a further 10,000 whānau watching a live stream of the event.

A highlight of the event was an interactive Tītī installation. By the end of the Hui, there was a flock of Tītī flying, all decorated or written in by the whānau attending. This installation was possible with the support of Community Trust South.

The partnership and collaboration of the kaupapa Māori organisations in Murihiku supported the efforts of the four organising rūnaka, and Te Rūnanga o Ngai Tahu in providing information and advice on the support available within the region, positively celebrating everything Māori and highlighting all that Murihiku has to offer.



## SPORT SCHOLARSHIP

Support for elite sport with a focus on the development of athletes, coaches and officials to excel and reach their potential.

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### SHAKIRA MIRFIN - 2019 WORLD ROWING JUNIOR CHAMPIONSHIPS

2019 was a particularly impressive year for junior rower Shakira Mirfin. Winning a national title in the under 17 girls single scull at Maadi Cup, Shakira then trialled and won a place in the Junior New Zealand women's quadruple sculls crew.

The 2019 World Rowing Junior Championship was held in Tokyo and the New Zealand women's quadruple sculls crew were unbeatable, winning their heat, semi-final and the final saw the girls all bringing home gold medals.

Shakira has been well supported back home with her coach Jack Allan believing she is easily the best rower he has mentored, as well as being part of the Academy Southland athlete programme. Academy Southland offers athletes an induction into high performance sport with a focus on athlete life, sport nutrition, performance psychology and strength and conditioning. Shakira credits the programme for teaching her how to look after herself and she learnt that sometimes little things can make a massive difference to your performance.

"I heard about Community Trust South funding through Academy Southland. During my time in the programme I learned about the impact Community Trust South has had on our community and the different funding opportunities the Trust provides. The funding I received from the Trust had a massive impact financially on my Junior Worlds experience, it helped to support me to cover the overall costs of the entire Junior's campaign. Receiving funding from the Trust was awesome, to have a part of the community behind me helping me to reach my goals." – Shakira Mirfin

This is only the start for Shakira, she is hoping to gain selection to the New Zealand under 23 rowing team and continue to further her rowing career - with the passion and drive she has shown there will be more Gold in her future.



Junior New Zealand Women's Quadruple Sculls Crew

# Grants Listing

## GRANTS APPROVED FOR YEAR ENDED 31 MARCH 2020

Age Concern Southland	58,000	Edendale Primary School	4,524
Alzheimers Society Southland	7,500	EDUK8 Charitable Trust	25,000
Anderson House Trust	1,000	Epilepsy Association of New Zealand	7,500
Aparima College	5,178	Fernworth Primary School	10,045
Aparima Taekwondo Club	2,500	Fiordland College	154,272
Arrowtown Autumn Festival	5,000	Fiordland Community House	37,500
Arrowtown Menzshed	35,000	Fiordland Community Swimming Pool Association	250
Arrowtown School	15,955	Fiordland Museum Trust	300,000
Arthritis Foundation of New Zealand	3,000	Fiordland Players	2,000
Arts Murihiku Charitable Trust	10,000	Fiordland Trails Trust	250,000
Arts On Tour NZ Trust	5,000	Garston School	1,589
Ascot Community School	10,656	Glenham School	1,500
Aurora College	12,596	Glenorchy School	1,500
Autism New Zealand	7,000	Golf Southland	31,700
Badminton Southland Association	15,410	Gore and Districts Senior Citizens Club	500
Balfour School	2,692	Gore Country Music Club	2,000
Balfour Sports Ground Association	35,000	Gore District Council	255,600
Barnardos New Zealand	40,000	Gore High School	12,096
Better Communities Trust	2,350	Gore Kids Hub Charitable Trust	4,150
Bhartiya Samaj Charitable Trust	2,000	Gore Main School	5,672
Blue Light Ventures	5,000	Gore Musical Theatre	7,500
Blue Mountain College	5,213	Gore Southern Shears	5,000
Bluff School	5,676	Gorge Road School	1,500
Bone Marrow Cancer Trust	19,000	Grey Power Southland Association	8,000
Borland Lodge Adventure and Education Trust	10,000	Halfmoon Bay School	11,514
Bowls Southland	19,370	Happiness House Trust	11,000
C S Art Charitable Trust	15,000	Hauroko Valley Primary School	2,595
Cancer Society of New Zealand, Otago and Southland Division	27,450	Head Injury Society of Southland	7,500
CareerFest Southland	8,000	Heartland Cricket Trust	3,000
CCS Disability Action Southland	35,000	Heddon Bush School	1,777
Central Lakes Family Services	105,000	Hedgehope School	1,500
Central Southland College	13,963	Heriot School	1,873
Central Southland Community Swimming Pool	5,000	Heritage South Trust	9,600
Central Southland Hospital Charitable Trust Board	2,500	HETTANZ Southland	600
Central Southland Presbyterian Parish	5,000	Hillside Primary School	1,500
Central Southland Senior Citizens Welfare Centre	2,000	Hockey Southland	28,040
Chamber Music New Zealand Trust Board	10,000	Hokonui Trails Trust	7,550
Chamber of Commerce Southland	53,000	Ice Sports Southland	6,310
ChatBus Trust	41,700	Indian Community Southland	7,500
Children's Day Committee Invercargill	2,000	Invercargill Central Baptist Church	100,000
Choirs Aotearoa New Zealand Trust	5,000	Invercargill Filipino Dance Group	2,000
Christmas In The Theatre	2,000	Invercargill Golf Club	60,000
CHROMA - The LGBTIQ+ Initiative for Southland	11,412	Invercargill Gymnastic Club	6,000
Citizens Advice Bureau Invercargill	5,000	Invercargill Kennington Pony Club	1,800
Citizens Advice Bureau Queenstown	4,900	Invercargill Middle School	5,853
City of Invercargill Highland Pipe Band	15,000	Invercargill Musical Theatre	25,000
COIN South	20,000	Invercargill Public Art Gallery	67,000
Community Colleges New Zealand	3,000	Invercargill Rowing Club	7,383
Community Networking Trust Eastern Southland	52,000	Invercargill Secondary Schools' Network Trust	90,000
Croquet Southland	4,930	Invercargill Tap Dancing Association	3,500
Cycling Southland	46,020	James Hargest College	37,572
Cystic Fibrosis Association of New Zealand	2,500	Jubilee Budget Advisory Service	10,000
Dan Davin Literary Foundation	7,500	KidsCan Charitable Trust	8,000
Deaf Lawn Bowls New Zealand	300	Kingsview School	1,801
Destination Queenstown	10,000	Knapdale School	1,715
Diocese Trust Board of the Anglican Dioceses of Dunedin	30,000	Koha Kai Trust Board	130,000
Dipton School	1,994	Koru Care Southland Charitable Trust	5,000
Disabilities Resource Centre Southland Charitable Trust	41,000	Learning Differences Aotearoa Trust	19,500
Donovan Primary School	12,337	Life Education Trust Southland	7,800
Drummond Primary School	1,892	Limehills School	4,786
Drummond Rugby Football Club Inc Southland	20,000	Lochiel School	2,765
Dunedin Community Care Trust	10,000	Longford Intermediate	6,876
East Gore School	4,458	Loss and Grief Support Trust Southland	40,000
Eastern Southland Basketball Association	59,970	Love Local Charitable Trust	15,000
Eastern Southland Gallery	9,000	LUMA Light Festival Charitable Trust	15,000

Lumsden Heritage Trust	47,000	Riversdale School	3,054
Lumsden School	2,575	Riverton Beautification Project	2,000
Makarewa School	3,565	Riverton Community Arts Centre Charitable Trust	8,000
Mararoa School	1,500	Riverton Community Charitable Trust	17,500
Marching Southland Association	5,820	Riverton Golf Club	15,600
Marist Brothers Old Boys Rugby Club Invercargill	16,000	Riverton Primary School	5,023
Mataura & Districts Senior Citizens Association	1,000	Riverton Senior Citizens Association	1,500
Mataura School	5,106	RMH South Island Trust	18,600
Menzies College	8,727	Rock Quest Charitable Trust	5,000
Methodist Mission Southern	13,270	Ronald McDonald House Charities New Zealand Trust	20,625
Michael Hill International Violin Competition Charitable Trust	2,500	Royal New Zealand Foundation of the Blind	10,000
Mossburn School	1,853	Royal New Zealand Plunket Trust	45,000
Murihiku Māori & Pasifika Cultural Trust	85,000	Royal New Zealand Returned and Services Association	35,000
Murihiku Maori Secondary Schools Teachers Trust	10,000	Rugby Southland	369,380
Murihiku Maori Wardens	5,000	Ruru Specialist School	2,286
Murihiku Young Parents Learning Centre	1,000	Sacred Heart School	2,433
Myross Bush School	4,312	Salford School	7,086
National Council of Women Southland	500	Scholarships - Create	8,187
National Heart Foundation of New Zealand	8,500	Scholarships - Leadership	4,300
Nehemiah Trust	30,000	Scholarships - Sport	53,200
Netball South Zone	165,160	Scout Association of New Zealand	6,000
New River Primary School	8,359	SeniorNet South	2,000
New Zealand Council of Victim Support Groups	17,000	Shakespeare in the Park Charitable Trust	5,000
New Zealand Country Music Festival Trust	30,000	Sharks Basketball	70,000
New Zealand Songwriters Trust	9,100	Shotover Primary School	16,244
Newfield Park School	8,728	Show Me Shorts Film Festival Trust	3,000
Nga Putangitangi	10,000	Showbiz Queenstown	10,000
Nightcaps Squash Club	20,000	Snow Sports NZ	5,000
Norman Jones Foundation Trust Board	45,000	South Alive Ltd	27,000
Northern Southland College	5,065	South Coast Environment Society	36,000
Northern Southland Community Resource Centre Charitable Trust	13,500	South Invercargill Urban Rejuvenation Charitable Trust	5,000
NZ Family and Foster Care Federation	8,000	Southern Pro Wrestling Club	6,000
Ohai Senior Citizens	500	Southern REAP	74,000
Olympic Ice Sports Club	1,500	Southern Steam Train Charitable Trust	100,000
Oreti Surf Life Saving Club	4,690	Southland ACC Advocacy Trust	3,500
Otago Southland Area of New Zealand Pony Clubs Association	5,000	Southland Adventist Christian School	2,172
Otama School	1,500	Southland Amateur Rowing Association	1,300
Otatara School	6,842	Southland Asthma Society	10,000
Otautau and Districts Community Charitable Trust	15,015	Southland Basketball Association	30,040
Otautau Golf Club	5,000	Southland Beneficiaries and Community Rights Centre	31,000
Otautau School	5,614	Southland BMX Club	4,580
Outreach Singing Aotearoa	10,000	Southland Board Riders Association	5,400
Outward Bound Trust of New Zealand	20,000	Southland Boys' High School	23,558
Pacific Island Advisory and Cultural Trust	86,000	Southland Canoe Club	4,590
Parenting Place Charitable Trust	15,950	Southland Clay Target Club	1,000
Perinatal Mental Health New Zealand	2,500	Southland Community House Charitable Trust	26,000
Philanthropy New Zealand	4,560	Southland Competitions Society	5,000
Phoenix Synchro Southland	8,950	Southland Cricket Association	28,330
Pillars	5,000	Southland Deaf Community	800
Poppycock Trust	40,000	Southland Disability Enterprises	50,000
Pregnancy Help Inc Invercargill	5,000	Southland District Rugby Football League	15,360
Presbyterian Support Southland	140,000	Southland Filipino Society	7,500
Pukerau School	1,800	Southland Foodbank Trust	15,000
Queenstown Alpine Ski Team	10,530	Southland Football	42,570
Queenstown Art Society	7,500	Southland Free Kindergarten Association	7,539
Queenstown Bowling Club	30,000	Southland Girls' High School	25,160
Queenstown Cricket Club	2,000	Southland Heritage Building and Preservation Trust	30,000
Queenstown Gaels	2,000	Southland Hindi School Charitable Trust	5,240
Queenstown Grey Power	1,500	Southland Indoor Bowls Centre	7,920
Queenstown Ice Hockey Club	6,700	Southland Indoor Leisure Centre Charitable Trust	250,000
Queenstown Lakes District Council	13,000	Southland Justices of the Peace Association	1,300
Queenstown Lakes Rugby League Charitable Trust	2,138	Southland Kidney Society	2,000
Queenstown Mountain Bike Club	10,450	Southland Kiribati Community and Youth	8,000
Queenstown Primary School	18,378	Southland Literacy Association	2,795
Queenstown Robotics Trust	6,000	Southland Mangaia Club	3,000
Rape and Abuse Support Centre Southland	30,000	Southland Mountain Bike Club	7,120
Read NZ Te Pou Muramura	2,000	Southland Multicultural Council	38,000
Remarkables Cancer Gym Charitable Trust	10,000	Southland Multiple Sclerosis Society	15,000
Remarkables Primary School	17,083	Southland Multiples	570
Rimu Full Primary School	3,439	Southland Photographic Society	2,500
Riversdale Arts	8,000	Southland Regional Development Agency	208,600

# Grants Listing

## GRANTS APPROVED FOR YEAR ENDED 31 MARCH 2020

Southland Regional Heritage Committee	15,000	The South Centre Anglican Care Trust Board	30,000
Southland Schools Pipe Band Programme Trust	35,000	The Southern Filmmakers Trust	12,000
Southland Secondary School Sport	18,317	The Southern Hearing Charitable Trust	2,000
Southland Social Sciences Fair	2,000	The Southern Regions Branch of the Muscular Dystrophy Association of NZ	5,000
Southland Softball Association	16,850	The Southland Christmas Parade Charitable Trust	15,000
Southland Stroke Club	3,000	The Southland Woodworkers Guild	14,000
Southland Table Tennis Association	9,610	The Stewart Island Promotion Association	22,500
Southland Teachers & Judges of Highland & National Dancing	650	The Stroke Foundation of New Zealand	5,000
Southland Tennis Association	11,450	The Theatre in Health Education Trust	2,500
Southland Triathlon and Multisport Club	6,800	Thornbury School	2,251
Southland Warm Homes Trust	25,000	Tisbury School	4,176
Southland Water Polo Club	14,110	Tokanui Bowling Club	5,350
Southland Workers' Educational Association	27,000	Tokanui Golf Club	4,000
Southland Yachting Association	6,020	Tokanui School	21,364
Southland Youth One Stop Shop	70,000	Touch Southland	59,380
Spirit Army	45,000	Tuatapere Community Worker Support Trust	12,500
Sport Otago	30,000	Tuatapere District Lions Club Charitable Trust	40,000
Sport Southland	127,212	Tuturau Primary School	1,567
Squash City Invercargill	4,500	Verdon College	17,505
Squash Southland	12,180	Vintage Car Club of New Zealand Gore Branch	25,000
St John's Girls' School	3,469	Volleyball Southland	15,640
St Joseph's School Invercargill	5,413	Volunteering Otago Trust	5,000
St Joseph's School Queenstown	4,778	Waianiwa School	1,729
St Mary's School Gore	6,232	Waiau Area School	4,509
St Patrick's School Invercargill	9,540	Waihopai City Lions Club	5,000
St Patrick's School Nightcaps	1,515	Waihopai Rowing Club	11,508
St Peter's College	9,157	Waihopai Runaka	15,000
St Teresa's School Bluff	1,616	Waihopai School	9,111
St Theresa's School Invercargill	7,268	Waikaka Recreation Committee	1,500
St Thomas' School Winton	2,813	Waikaka School	1,500
Stadium Southland	15,500	Waikaka Combined Sports Association	2,500
Stewart Island Senior Citizens	2,000	Waikaka Primary School	1,897
Stopping Violence Southland	20,000	Waikaka White Star Rugby Football Club	18,000
Swim Southland	17,250	Waikawa District Museum	6,000
Switzers Museum	21,060	Waikiwi Rugby Football Club	8,500
Takitimu Community Development Committee	2,500	Waikoiko School	1,500
Takitimu District Pool Society	125	Wakatipu Clay Target Club	60,000
Takitimu Primary School	2,949	Wakatipu Heritage Trust	75,000
Talent Development Southland Charitable Trust	50,000	Wakatipu High School	23,093
Talk Link Trust	10,000	Wakatipu Rowing Club	5,000
Tangata Whenua, Community and Voluntary Sector Research Centre	3,000	Wakatipu Toy Library	15,000
Tapanui Fire Service Support Committee	10,000	Wakatipu Youth Trust	30,000
Tapanui School	3,343	Wallacetown School	2,042
Te Anau Community Events Charitable Trust	6,500	Waverley Park School	9,136
Te Anau Golden Age Club	1,000	Wellington Museums Trust	5,000
Te Anau School	8,518	West Gore School	7,227
Te Rourou Whakatipuranga O Awarua	8,000	Windsor North School	9,137
Te Runaka O Awarua Charitable Trust	50,000	Winter Games New Zealand	25,000
Te Tipua School	1,500	Winton Contract Bridge Club	7,000
Te Waipounamu Maori Netball	5,000	Winton School	8,452
Te Wharekura o Arowhenua	6,365	Woodlands Full Primary School	2,860
Templeton Flax Milling Heritage Trust	7,400	Woodlands Swimming Pool & Recreation Charitable Trust	8,000
The Boys' Brigade in New Zealand	4,000	Wyndham School	3,773
The CanInspire Charitable Trust	2,000	Young Men's Christian Association of Invercargill Charitable Trust	30,000
The Conductive Education (Southern) Charitable Trust	20,000	Youth Development Southland Region Trust	70,000
The Drummond Community Pool Trust	35,000	<b>Total Grants Approved</b>	<b>7,763,160</b>
The Footnote Dance Trust Board	5,122	<b>LESS:</b>	
The Girl Guides Association New Zealand	5,000	Grants committed in principal	117,380
The Head of the Lake Trails Trust	26,550	Grants repaid	27,870
The Hearing Association Southland Branch	11,500	Grants written off	101,488
The Invercargill City Charitable Trust Board	8,000	Murihiku health scholarships repayable	17,916
The Motor Neurone Disease Association of New Zealand	5,000		
The New Zealand Academy of Highland & National Dancing	2,000		<b>264,654</b>
The New Zealand Symphony Orchestra Foundation	2,500		<b>7,498,506</b>
The Royal New Zealand Ballet	10,000		
The Royal New Zealand Society for the Prevention of Cruelty to Animals	5,000		

# Community Trust South

## Summary of Financial Statements

### For Year Ended 31 March 2020

in New Zealand Dollars (\$000s)

#### SUMMARY STATEMENT OF COMPREHENSIVE REVENUE AND EXPENSE

For year ended 31 March 2020

	Group	
	2020	2019
<b>Revenue</b>		
Revenue from investing activities	(2,063)	13,192
Share of profit from associates	(1)	398
<b>Total revenue</b>	<b>(2,064)</b>	<b>13,590</b>
<b>Operating expenses</b>		
Investing activity expenses	1,706	1,640
Trust expenses	1,284	1,234
Impairment loss	2,349	-
	<b>5,339</b>	<b>2,874</b>
<b>Other Expenses</b>		
Grants committed to community groups	7,498	8,055
Discount on concessionary loans	(118)	76
	<b>7,380</b>	<b>8,131</b>
<b>Total expenses</b>	<b>12,719</b>	<b>11,005</b>
<b>Net (deficit)/income before taxation</b>	<b>(14,783)</b>	<b>2,585</b>
Profit from discontinued operations	-	528
<b>Net (deficit)/income after taxation</b>	<b>(14,783)</b>	<b>3,113</b>
Other comprehensive income	-	299
<b>Total comprehensive (deficit)/income for the year</b>	<b>(14,783)</b>	<b>3,412</b>
<b>Total comprehensive (deficit)/income is attributed to:</b>		
Owners of the parent	(14,783)	3,412
	<b>(14,783)</b>	<b>3,412</b>

#### SUMMARY STATEMENT OF CHANGES IN NET ASSETS/EQUITY

For year ended 31 March 2020

Group	Trust Capital	Capital Maintenance Reserve	Grants Maintenance Reserve	Asset Revaluation Reserve	Accumulated Revenue and Expense	Total
Opening balance at 1 April 2018	158,460	103,244	(32,814)	-	-	228,890
Total comprehensive revenue and expense	-	-	-	-	3,412	3,412
<b>Transactions with owners</b>						
Transfer to/(from) reserves	-	3,649	(536)	299	(3,412)	-
Adjustment to reserves	-	-	(99)	99	-	-
<b>Closing balance at 31 March 2019</b>	<b>158,460</b>	<b>106,893</b>	<b>(33,449)</b>	<b>398</b>	<b>-</b>	<b>232,302</b>
Total comprehensive revenue and expense	-	-	-	-	(14,783)	(14,783)
<b>Transactions with owners</b>						
Transfer to/(from) reserves	-	6,172	(20,955)	-	(14,783)	-
<b>Closing balance at 31 March 2020</b>	<b>158,460</b>	<b>113,065</b>	<b>(54,404)</b>	<b>398</b>	<b>-</b>	<b>217,519</b>

## SUMMARY STATEMENT OF FINANCIAL POSITION

As at 31 March 2020

in New Zealand Dollars (\$000s)

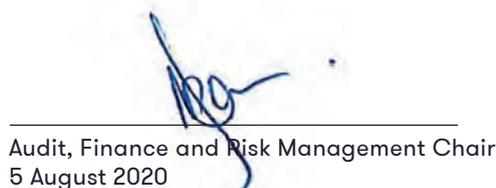
Group

	2020	2019
Current assets	1,232	4,609
Non-current assets	223,584	235,057
<b>Total assets</b>	<b>224,816</b>	<b>239,666</b>
Current liabilities	4,706	4,503
Non-current liabilities	2,591	2,861
<b>Total liabilities</b>	<b>7,297</b>	<b>7,364</b>
<b>Net assets</b>	<b>217,519</b>	<b>232,302</b>
<b>Net assets/equity comprise:</b>		
Net assets/equity attributable to equity holders of parent	217,519	232,302
<b>Total Net Assets/Equity</b>	<b>217,519</b>	<b>232,302</b>

Approved on behalf of the Board:



Board Chair  
5 August 2020



Audit, Finance and Risk Management Chair  
5 August 2020

## SUMMARY STATEMENT OF CASH FLOWS

For year ended 31 March 2020

Group

	2020	2019
<b>Cash (outflow) from operating activities</b>	<b>(6,828)</b>	<b>(2000)</b>
<b>Cash (outflow) from investing activities</b>	<b>5,717</b>	<b>2,044</b>
<b>Net increase / (decrease) in cash held</b>	<b>(1,111)</b>	<b>44</b>
Add cash at beginning of year	1,526	1,482
<b>Total cash balance at end of year</b>	<b>415</b>	<b>1,526</b>
<b>Represented by</b>		
Cash and cash equivalents	415	1,526
<b>Total cash balance</b>	<b>415</b>	<b>1,526</b>

## SUPPLEMENTARY INFORMATION

For year ended 31 March 2020

### Reporting entity

Community Trust South ("the Trust") was formed under the Trustee Banks Restructuring Act 1988 and is incorporated under the Charitable Trusts Act 1957. The consolidated Summary Financial Statements presented are those for Community Trust South (the "Group"). The Group consists of Community Trust South, and its subsidiary entities, Invest South GP Limited and Invest South Limited Partnership.

These summary financial statements have been prepared in accordance with PBE FRS 43: Summary Financial Statements. The specific disclosures included in the Summary Financial Report have been extracted from the full audited financial statements approved by the trustees on 5 August 2020 and on which an unmodified opinion was issued dated the same date. The full financial statements have been prepared in accordance with NZ PBE Reduced Disclosure Regime as appropriate for Tier 2 not-for-profit public benefit entities. The full financial statements have been prepared to comply

with the Accounting Standards Framework for Public Benefit Entities. Users of the Summary Financial Statements should note that the information contained herein cannot be expected to provide a complete understanding as provided in the full financial report of the Group.

These Summary Financial Statements are presented in New Zealand dollars (\$), which is the Group's functional currency. All financial information presented in New Zealand dollars has been rounded to the nearest thousand.

Users who require additional information are encouraged to access the full financial statements on the Group's website at [www.communitytrustsouth.nz](http://www.communitytrustsouth.nz)

Users who do not have access to the website can request a printed version from the following address:

Community Trust South  
PO Box 1646  
Invercargill 9840  
Phone (03) 218-2034  
Email info@communitytrustsouth.nz

Or collect a copy from the Trust's offices at  
62 Don Street, Invercargill.

The Summary Financial Statements are authorised for issue by the  
Board of Trustees on 5 August 2020 .

## Trustee fees

Trustee fees are set by the Minister of Finance  
at a fixed annual amount. Trustee remuneration as follows:

	2020	2019
Richard Wason	16	16
Penny Simmonds (1/3 remuneration paid to SIT)	25	14
Lindsay Wright	19	18
Trish Boyle	14	14
Mata Cherrington	14	14
John Wyeth	14	14
Ross Jackson (retired June 2018)	-	4
Michael Wilson (appointed July 2018)	14	11
Margot Hishon (retired May 2019)	5	29
Stephen O'Connor (retired May 2019)	2	14
Warren Skerrett (retired May 2019)	3	16
Bill Moran (appointed June 2019)	13	-
Stephen Canny (appointed June 2019)	12	-
David Goble (appointed June 2019)	12	-
	<b>163</b>	<b>164</b>

## Grant commitments

Grants to eligible organisations are recognised as an expense  
when they are approved by the Trustees of the Group. Payments to  
grant recipients are made on the satisfaction of specified funding  
conditions. Grants are withdrawn when projects do not proceed as  
planned or recipients advise that the funds are no longer required.  
Grants covering multiple years are recognised as a commitment in  
principal for future years.

	2020	2019
Grants approved in current year	7,763	7,685
Grants withdrawn for current year	(30)	(22)
Grants withdrawn for prior years	(72)	(170)
Grants repaid	(28)	(1)
Scholarships repayable	(18)	(55)
Grants approved in principal relating to future years	(117)	618
	<b>7,498</b>	<b>8,055</b>

# Auditor's Report



## Report of the independent auditor on the summary financial statements

To the Trustees of Community Trust South

The consolidated summary financial statements comprise:

- the summary statement of financial position as at 31 March 2020;
- the summary statement of comprehensive revenue and expense for the year then ended;
- the summary statement of changes in net assets/equity for the year then ended;
- the summary statement of cash flows for the year then ended; and
- supplementary information.

### Our opinion

The summary financial statements are derived from the audited consolidated financial statements of Community Trust South, including its subsidiaries (the Group) for the year ended 31 March 2020.

In our opinion, the accompanying consolidated summary financial statements are consistent, in all material respects, with the audited consolidated financial statements, in accordance with PBE FRS-43: *Summary Financial Statements* issued by the New Zealand Accounting Standards Board.

### Consolidated summary financial statements

The consolidated summary financial statements do not contain all the disclosures required by Public Benefit Entities Standards Reduced Disclosure. Reading the consolidated summary 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 thereon. The consolidated summary financial statements and the audited consolidated financial statements do not reflect the effects of events that occurred subsequent to the date of our report on the audited consolidated financial statements.

### 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 5 August 2020.

### Responsibilities of the Trustees for the consolidated summary financial statements

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

### Auditor's responsibility

Our responsibility is to express an opinion on whether the consolidated summary 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) 810 (Revised), *Engagements to Report on Summary Financial Statements*.

We are independent of the Trust and Group. Other than in our capacity as auditor we have no relationship with, or interests in, the Trust or Group.

### Who we report to

This report is made solely to the Trustees, as a body. Our audit work has been undertaken so that we might state those matters which 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.

Chartered Accountants  
5 August 2020

Dunedin

## CONTACT US

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