



Community Trust South



TE POU ARATAKI POUNAMU O MURIHIKU

2021 Annual Report



Ngā Kupu Whakataua a te Heamana

E ngā Rangatira, e mihi mahana atu nei ahau ki a koutou, ā, ki a tātou katoa, Te Pou Arataki Pounamu o Murihiku.

He nui taku pārekareka ki te tuku atu i Ngā Kupu Whakataua a te Heamana 2020-2021 i taku whakatū anō ki te tūranga Heamana i te marama o Mei 2020.

I uaua te tau 2020-2021 ki tā tātou hapori nā te urutā o te Mate Korona-19. Ka aro Te Pou Arataki Pounamu o Murihiku ki ngā whakaarotau nunui me te tautoko tangata, tautoko hapori i whakaaweawetia e te Mate Korona-19 ahakoa te tuku tautoko tonu i ngā roopu i ā rātou mahi ia rā, ia rā. Ka aro tā tātou tirohanga ki ngā putanga matatika, ā, e taurangitia ana te whakaoranga pāpori, whakaoranga ohaoha ki tā tātou rohe.

He wā angitu te tau ahumoni 2020-2021, ā, he pārekareka rawa ki te Whakamārama atu kua 20.8% te utu whaipānga i te haumitanga tau tūmau.

He āhuetanga nui o te mahi a te Te Pou Arataki Pounamu o Murihiku he hono atu me te mahitahi ki ngā hapori, ā, he kaha tonu tēnei aronga i tēnei tau. Kua whakakahangia te rangapū ki te ILT, ILT Foundation, ā, tātou ko Te Pou Arataki Pounamu o Murihiku. Kua whaihua tēnei rangapū e whaiwhakaaro nei i ngā hiahia o nāiane, ngā hiahia e puta mai ana me ā tātou haepapa ngātahi ki te tautoko i tā tātou hapori.

Nā te whānui o tā tātou rohe me whakapāpā tātou ki ngā hapori katoa i roto i tā tātou rohe. I te Tēpu Poari, e ngākaunui ana tātou ki te whakakaha te aronga ki tēnei āhuetanga, ā, i tēnei tau i whakaaturia atu te Hui ā Poari ki Wakatipu. Nā tēnei āheinga i maramangia mai ai ngā Kaitarahiti i te patanga o te Mate Korona-19 ki te hapori whānui.

Te urupare ki te Mate Korona-19 me ngā hiahia a te hapori, ka whakarato pūtea Te Pou Arataki Pounamu o Murihiku hei tautoko i te hauora hinengaro o tā tātou hapori. Ko tētahi tauira te whakarato pūtea ki te Fiordland Health Trust hei tautoko i te āheinga ki ngā ratonga tautoko i te hauora hinengaro i te Fiordland takiwā. I whakaratonga anō hoki te pūtea tautoko ki Wakatipu Community Foundation hei tautoko i te hauora hinengaro i te Wakatipu takiwā nā te mōhio ki te whakaaweawe nui o te Mate Korona-19 ki ēnei takiwā.

E arotake tonu ai nei tātou i ā tātou tikanga kia tika ai te whakataua i ngā hiahia a tā tātou hapori. Kua kaha mahi nei tātou ki te whakawhanake te mōhiotanga o Te Reo Māori me te maramatanga o Te Tiriti o Waitangi. Kua hohonu e ngā kaimahi katoa rātou ko ngā Kaitarahiti te ako ngaio e whakamarohingia ana i te whakatū o tā tātou kanohi Mana Whenua a Louise Fowler. Kua kaha mahi nei tātou kia whakaaturia ngā āhuetanga katoa o ngā ahurea e rua. Kua kaha āwhina te whakakaha anō tēnei tikanga i ngā arotakenga me ngā hurihanga ki te Titi Tarahiti.

E hiahia ana ahau ki te whakamahi te mahi o ngā Kaitarahiti, inarā a Lindsay Wright i tā māua whakaotinga i ngā tau e waru, ā, i mutu mahi nei māua i Te Pou Arataki Pounamu o Murihiku i te marama o Akuhata 2021. I tēnei wā i whakaaturia mai te kouniga o te hautūtanga a Lindsay i ana tūranga Heamana Tuarua me te Heamana o te Investment Committee. I whakatāngia mai a Ross Jackson i te marama o Hūrae 2021 i ana tūranga Heamana o te Audit, Finance and Risk Management Committee, ā, kua nui atu te uara ki te Tarahiti ana mātauranga me ana tohutohu. Kua whakatū mai a Kathryn Ball ki te whakakā i tana tūranga, ā, kua mōhio nei ahau ka kaha tonu a ia ki te whakakaha te mahi a te Audit Finance and Risk Management Committee.

E hiahia ana ahau ki te whakahua rawa i ngā kaimahi e mahi ana i Te Pou Arataki Pounamu o Murihiku. E arahina ana e Jackie Flutey, he ngaio rawa atu, he ngākaunui rawa atu anō hoki rātou e whakahohonu rawa atu ana, e whakawhānui rawa atu ana i ngā mahi o Te Pou Arataki Pounamu o Murihiku. Kua nui tā tātou waimarie he roopu kaha ki te mahi tā tātou.

I ahau e heke ana i te tūranga Heamana o Te Pou Arataki Pounamu o Murihiku, e mihi mahana ana ahau i ngā Kaitarahiti hou a Mel Montgomery, Leon Hartnett rātou ko Leanne Samuel. Me te tāpiri o ā rātou mōhiotanga kanorau e mauria mai ana ki Te Pou Arataki Pounamu o Murihiku kua whakamanawa nei ahau ka whakarato tonu, ā, ka puāwai ahakoa nga uauatanga.

Ngā manaakitanga ki runga i a koutou. Tēnā koutou, tēnā koutou, tēnā tātou katoa.

Nā Trish Boyle
Heamana

Message from the Chair

E ngā Rangatira, e mihi mahana atu nei ahau ki a koutou, ā, ki a tātou katoa, Te Pou Arataki Pounamu o Murihiku.

I am pleased to present the 2020-2021 Chair's Report having been re-appointed as Chair in May 2020.

2020-2021 was a challenging year for our community with the COVID-19 pandemic. Community Trust South focused on the most critical priorities and supporting people and communities most impacted by COVID-19 while supporting organisations in their essential day-to-day activities. Our approach focused on equitable outcomes and ensuring the social and economic recovery of our region.

The 2020-2021 financial year was a very successful period, and it is extremely pleasing to report that we have achieved a 20.8% annual investment return for the year.

An essential aspect of the work of Community Trust South is to connect and collaborate with all communities, which continues to be a strong focus this year. ILT, ILT Foundation and Community Trust South have strengthened our partnership. This partnership has been beneficial when considering the current and emerging needs and our shared responsibilities to support our community.

Given our broad geographic reach, we must engage with all the communities in our area. At the Board table, we are always keen to ensure that our focus is on this, and this year we have had a Board meeting in Queenstown. This opportunity helped Trustees understand the significant impact of COVID-19 on this community.

In response to COVID-19 and the community need, Community Trust South provided funding to support the mental health of our community. Just one example of this was funding provided to the Fiordland Health Trust to support access to critical mental health support services in the Fiordland area. Similar funding support was also provided to Wakatipu Community Foundation for mental health support in the Wakatipu area, recognising the significant impact of COVID-19 on these areas.

We continually review our practice to ensure we meet the needs of our community. This year we have worked to develop our knowledge of Te Reo Māori and understanding of Te Tiriti o Waitangi. There has been extensive professional learning for all staff and Trustees, which is bolstered with the appointment of our Mana Whenua Endorsed Trustee, Louise Fowler. We have tried to ensure that all aspects of our work reflect our dual culture. The review and changes to the Trust Deed have also helped reinforce this practice.

I wish to acknowledge the work of fellow Trustees and, in particular, Lindsay Wright, having completed eight years. Lindsay and I finished with Community Trust South in August 2021. Over this period, Lindsay's role as Deputy Chair and Chair of the Investment Committee reflects his outstanding leadership. Ross Jackson retired in July 2021 as independent Chair of the Audit, Finance and Risk Management Committee, and his knowledge and guidance have been of immense benefit to the Trust. Kathryn Ball has been appointed to take his place, and I know that she will continue to strengthen the work of the Audit Finance and Risk Management Committee.

I want to make a special mention of the staff who work at Community Trust South. Led by General Manager Jackie Flutey, they are very professional and exceptionally committed individuals who, as a whānau, add depth and breadth to the work of Community Trust South. We are fortunate to have such a dedicated team.

As the outgoing Chair of Community Trust South, I warmly welcome to the Trust, new Trustees Mel Montgomery, Leon Hartnett and Leanne Samuel. With the addition of their diverse expertise and knowledge to our Trust, I am reassured that our community will continue to be served and flourish even in the most challenging of conditions.

Ngā manaakitanga ki runga i a koutou. Tēnā koutou, tēnā koutou, tēnā tātou katoa.

Trish Boyle
Chair

Ngā Kaitarahiti – Our Trustees



Trish Boyle Chair
[Retired August 2021]



Mata Cherrington Chair
[Appointed August 2021]



Bill Moran
Deputy Chair



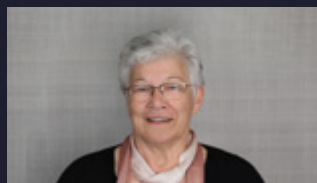
David Goble



Michael Wilson



Stephen Canny



Louise Fowler
Mana Whenua Endorsed Trustee



Kirsty Pickett



Lindsay Wright
[Retired August 2021]



John Wyeth
[Retired October 2020]



Melanie Montgomery
[Appointed August 2021]



Leanne Samuel
[Appointed August 2021]



Leon Hartnett
[Appointed August 2021]

Rautaki Whakamua – 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 will continue to fund to our strategic vision but will concentrate 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

Ngā Tatauranga a Tau – The Year in Numbers

TOTAL INVESTMENTS

\$258 million

(excludes loans & advances)

INVESTMENT RETURN

20.8%

FUNDING APPROVED SINCE ESTABLISHED IN 1988

\$209 million

FUNDING APPROVED 2020-21

\$5.9 million

Grants:

\$5,864,565

Scholarships:

\$6,150

FUNDING APPROVED BY POU (PILLAR)



50.5%

Health, Wellbeing & Active Lifestyles

\$2,966,898



20.5%

Community Development & Community

Economic Development

\$1,203,560



20.1%

Education

\$1,179,768



8.9%

Arts, Heritage & Culture

\$520,489

FUNDING BY AREA

● All of Community Trust South Area	\$1,360,172
● All of Southland	\$1,954,643
1 Western Southland	\$219,010
2 Fiordland	\$198,486
3 Wakatipu	\$671,787
4 Northern Southland	\$149,761
5 Central Southland	\$97,674
6 Invercargill & Bluff	\$897,364
7 West Otago	\$30,447
8 Eastern Southland	\$255,266
9 Southern Southland	\$19,243
10 Stewart Island	\$16,862

\$5,870,715



HEALTH, WELLBEING & ACTIVE LIFESTYLES

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



CENTRAL LAKES FAMILY SERVICES – MENTAL WELLBEING NAVIGATOR

A new Mental Wellbeing Navigator is proving vital in providing clear pathways to mental health services available within the Central Lakes community, identifying critical gaps and working to connect services to those in need.

Lisa Gear, a nurse with 30 years' experience and a passion for family support and perinatal care, was appointed to the role in March 2021. Based out of Central Lakes Family Services in Queenstown, she sits alongside new and existing clinical roles and acts as a main point of contact to streamline services and help co-ordinate the region's mental wellbeing response.

Funding the role for the next two years has been a collaborative effort, with Community Trust South contributing \$10,000, along with funding from Central Lakes Trust, Lotteries and Wakatipu Community Foundation - Greatest Needs Fund.

The Mental Wellbeing Navigator role was identified and set up by the Te Hau Toka Southern Lakes Wellbeing Group in direct response to community-wide mental health impacts being seen as a result of COVID-19. The group, comprising Southern DHB, WellSouth Primary Health Network, Queenstown Lakes District Council, Central Lakes Family Services and Tahuna-Whakatipu Māori Community, was formed in June 2020. It uses its extensive professional and personal networks to help co-ordinate an overall picture of ongoing needs which includes sharing wellbeing concerns, monitoring service capacity and working together on ways

to tackle the mental wellbeing effects in communities.

Lisa's first task has been identifying and connecting with organisations and groups within the Central Lakes region that offer mental health services and programmes. Five high risk areas have initially been identified - new and expectant parents, migrant communities, businesses, children and youth, and older persons. "There's a huge need in the community and some amazing people and organisations delivering great programmes and initiatives here so I'm building a directory of services to create clear pathways to match them up."

"Staffing, resources, high demand for services, inequities, and misinformation or mistrust around accessing services are all issues we're grappling with but in some cases, there are simple solutions and I can see that clear communication and working collaboratively is already making an impact."

"The navigator role is proving to be key in connecting services to people and connecting organisations and agencies. By harnessing the collective knowledge, expertise, experience and values of our healthcare agencies and affected communities, we have a great opportunity to work on 'for the community, by the community' solutions to support wellbeing." Lisa Gear – Mental Wellbeing Navigator.



Lisa Gear – Mental Wellbeing Navigator

EDUCATION

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



PLAYGROUND FUND – WAIHOPAI SCHOOL – PARK SYNDICATE

“Bumps...BUMPS!” It might have only been one word, but the excitement lit up one student’s face when asked what he was looking forward to in his new school playground.

The Park Syndicate operates as part of Waihopai School and caters for students with additional needs from the ages of 5 through to 21. There are currently 16 students on the roll, with the capacity to grow.

The Park Syndicate’s existing playground does not cater to students’ specific needs or offer much in the way of stimulation. The new playground, which is overlooked from the classrooms, will be colourful and inviting for the students. Large sails will be erected over most of the area, providing an all-weather play space. Sensory equipment will be designed to appeal to the visually and hearing-impaired while also being accessible for children with limited mobility and children with specific stimulation needs. A sensory play path will have the all-important bumps that are going to be a highlight for the children in wheelchairs.

Along with Community Trust South funding, the school community has shown its support for the project through additional fundraising initiatives. Eion McKenzie and his brother Allan undertook an impressive Bluff to

Cape Reinga cycle journey to support the project and his grandson, Ollie, who attends the Park Syndicate. The playground will be unique to Invercargill and will offer an inclusive play space for children from the school as well as the wider community.

Construction is underway with the sail poles already in place, but the real excitement will begin soon, with November as the target for completion. The space will be a wonderful early Christmas present for an excited group of students who at this stage, with their current playground being such a blank canvas, can barely imagine what it will look like.



Example of what the Park Syndicate Playground will look like

ARTS, HERITAGE & CULTURE

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



MĪHARO MURIHIKU TRUST & DEOW – SOUTH SEA SPRAY MOTUPŌHUE – BLUFF

“The Bluff community lifted the South Sea Spray project to new heights with their input, investment and aroha.”

Pauline Smith – Director Mīharo Murihiku Trust.

Mīharo Murihiku Trust in partnership with DEOW (Danny Owen) brought the South Sea Spray project to Motupōhue, after the success of the Aparima – Riverton pilot project. South Sea Spray is a street art festival that uses murals painted on buildings, streets and walls to bring art to communities and boost urban rejuvenation. Bluff was able to provide an almost blank canvas for the 15 artists that came for the week-long festival. The result is a vibrant, engaging and breath-taking mural trail throughout the township of Bluff starting at Ocean Beach.

The credibility and calibre of the artists made this an exciting project for Bluff and the murals have created an attraction for local, national and international visitors. The festival itself was an overwhelming success, supported not just by the people in Bluff, but also the entire local Southland community. The opening night exhibition was a full house, the community open day was attended by thousands and a record number of 71 pieces of art were sold through the gallery. Lots of schools and early child education groups participated and engaged with the artists, arriving by the busloads. Youth workshops were held over the festival with local young artists working together with the artists to create

their own collaborative mural. In total over 20 murals were completed all throughout Bluff, and the pride this brought the community was made clear to the artists.

The artists themselves talked with locals, researched and visited the Museum to create murals that reflected the community of Bluff, told stories of the region and in some cases highlighted local icons. The people’s choice winner, artist Koryu from Japan, based his design on the town’s relationship with the sea.

Funding for South Sea Spray Motupōhue – Bluff was another collaborative effort with Community Trust South contributing providing \$40,000 towards the project along with contributions from other local and national funders.

Mīharo Murihiku Trust’s aim is to create and facilitate opportunities to advance arts, culture, youth and education, inspiring young people to enhance their sense of cultural identity and well-being. The South Sea Spray festival embraces these values, the relationship between DEOW and the team at Mīharo can be credited for bringing together community, artists, schools, businesses, and the general public in a project that has showcased Bluff in a creative way.

Participating Artists – Kell Sunshine, Flox, Trustme, Dcypher, Charles Williams, & Janine Williams, MrG, Yikes, Erika Pearce, Berst, Shane Walker, Ikarus, Koryu, Sean Duffell and South Sea Spray leader and innovator Deow.



Deow & Mīharo Murihiku Trust with the artists

COMMUNITY DEVELOPMENT & COMMUNITY ECONOMIC DEVELOPMENT

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



NORTHERN SOUTHLAND REFORESTATION TRUST (REFOREST SOUTHLAND) – LUMSDEN COMMUNITY NURSERY

Reforest Southland is a reforestation trust and community nursery, based in Lumsden, that aims to bring native flora and fauna back to the area while promoting community growth and ecological education.

Their focus is on growing, replanting and regenerating areas of native bush, from riparian and marginal planting to larger reserves and parks, for the benefit of the local eco-system and the enjoyment of the local community.

The Lumsden Community Nursery is an integral part of these reforestation projects. Situated in the centre of Lumsden, the nursery has been designed with community involvement in mind, to grow the seedlings and plants required for the Trust's planting objectives. The nursery is now fully set up ready to use. The ground was prepared, fencing put up and weed matting put down over a few volunteer nursery sessions. Plant beds have been created and plants have been potted and re-potted with the help of local volunteers.

The nursery will grow plants that naturally grow in the region from seeds or plant cuttings ensuring there is no future conflict with the local ecological environment. Once grown and ready for replanting, Reforest Southland holds working bees where local community volunteers increase native flora and fauna in the region through their planting projects. "We have run a few planting

sessions near the Lumsden Creek and that is now looking really lovely. We have had lots of positive comments regarding our project and get a good turnout to our nursery sessions and to our planting sessions around the creek. We have sorted out our next area of planting and are in discussions with the council regarding how we can achieve this." Jeanna Rodgers – Reforest Southland.

The reforestation and revegetation projects, such as replanting the Lumsden Creek, increase the number of native plants and trees in the local area, providing habitat and food for native birds, fish and invertebrates, while aligning with the government's local and national plans to plant 1 billion trees by 2028.

In its first year the Trust aims to grow 10,000 native plants and trees through the Lumsden Community Nursery, 70% of which will be donated for community plantings and 30% will be sold to cover running costs of the nursery. With close links to local schools and support from the community the nursery aims to bring the community together in an inclusive 'green space' and replanting projects create spaces where people can enjoy time in a bio-diverse, natural setting which can have positive effects on mental health and wellbeing.



Jeanna Rodgers & Josie Blackshaw

COMPETE FUND

Supporting premier and elite sport, art and cultural groups to meet the costs of competing outside the region, as well as assisting with attracting and hosting premier events in our region.

EASTERN SOUTHLAND YFC SOUTHERN FIELD DAYS – MEGAN WHITEHEAD

On Thursday January 14th 2021, in a woolshed in Croydon, Gore, Megan Whitehead set a new world record in shearing for the Women's Strong Wool Lambs Division. Working to an average of one lamb every 49 seconds Megan smashed the previous record of 648 by shearing 661 lambs in 9 hours.

The event was overseen by five World Sheep Shearing Records Society judges via the internet and live streamed throughout NZ and around the world with over 2.5 million viewers. Inside the woolshed the event itself was a huge success with over 1000 volunteers, sponsors and supporters attending throughout the day to cheer Megan on.

It is not every day such an event is held, and everyone got behind Megan whose hard work and determination inspired so many within the community.

Megan trained for seven months for this record, shearing during the day and training at the gym six nights a week, to ensure she had the physical strength needed. However, it was the mental side of things that gave her the edge on the day, learning breathing techniques that helped to relieve stress and meditation to relax.

"To set a record, it's not just the physical side, you've got to be mentally strong and prepared as well. You

constantly need to keep yourself in a positive and good head space. During the last run, the sheep weren't quite sitting, so that run was mentally very tough. But there was no way I was ever going to give up. When you really want something, and love doing something so much, you just keep pushing through. That's why I had Dad as my second on the day. He was constantly talking to me and keeping me positive. It was a real team effort." Megan Whitehead.

Megan's father Quentin Whitehead taught Megan to shear from an early age and she has loved shearing ever since, both the physical side and the competitive side. Megan was part of a 4 women team who set the Strong Wool Lambs Women's 9 Hour 4 Stand shearing record in 2020. Megan sheared 608 lambs that day, 100 lambs ahead of her nearest rival.

"World record attempts are set up 12 months in advance, and with COVID-19, well there were times we didn't know if this would go ahead. There is a story within a story here, and we had to find a new way of doing things – and we did it. We have created a blueprint for how other people can do records in this new world environment." Quentin Whitehead.



Megan Whitehead



Megan Whitehead
& Quentin Whitehead



Megan Whitehead & Emily Welsh –
previous record holder

HEALTH, WELLBEING AND ACTIVE LIFESTYLES

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



FIORDLAND COMMUNITY EVENTS CENTRE TRUST – FIORDLAND INDOOR CLIMBING WALL

The Te Anau community is climbing high with its new indoor climbing wall. The climbing wall project has been a long time coming with strong community support from the start. The end result is a top of the line rock climbing facility that can cater for all abilities from beginners to experienced climbers, from children to any age.

Designed by NZ company Uprising, the wall has great visual impact with a nod towards the lakes and mountains of Fiordland in its design. It is built inside the Fiordland Community Events Centre which is the community's multiuse sports and entertainment facility. The Fiordland Endurance and Adventure Racing (FEAR) Society have paid for the training and assessment of 12 supervisors who are qualified through the NZ Outdoor Instructors Association and manage the day to day running of the wall including teaching skills.

Te Anau, Manapouri and wider Fiordland is a hub for adventure tourism and has a strong history with climbing – the Darran Mountains are considered to have some of the best rock climbing in New Zealand. The new indoor climbing wall provides an attraction for the area that is all-weather, all year round and all abilities.

Since its opening the wall has introduced hundreds to the sport of climbing and is suitable for holding regional climbing competitions. It can provide basic vertical rope-

work training opportunities for search and rescue groups while also offering a high level training environment for those aspiring to climb elsewhere in Fiordland and beyond. In the first 10 weeks of operation over 500 people from the community, primary schools and Fiordland College have been up the wall. There are 42 top rope/auto-belay routes, 5 lead routes and the wall operates 12 public hours a week with additional private and school bookings for students to come and climb.

The success of this project is down to some incredible and passionate volunteers from the FEAR Society, Andy Magness and Vaughn Filmer. They have shouldered all the work to create the vision, raise the funds, project manage the construction, organise volunteer supervisors and the administration including purchasing equipment to run the wall.

“Now a focal point of the Fiordland Community Events Centre the climbing wall is providing both visitors and locals an incredible experience that will support the region for years to come. Andy and I are already looking to finish the third phase of the project that was put on hold post COVID-19. We are very keen to include space for ‘bouldering’ - rope-free climbing that has been showcased to the world at the Tokyo Olympics.”
Vaughn Filmer.



Andy Magness & Vaughn Filmer

COMMUNITY DEVELOPMENT & COMMUNITY ECONOMIC DEVELOPMENT

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



LEADERSHIP NZ TRUST – MANA MOANA LEADERSHIP SCHOLARSHIP

“The course makes you think about what you’re doing and how you’re doing it. It’s about being authentic and where are you best to serve? Finding where you are supposed to be and being brave enough to get to where you need to be.” Apoua Fuatavai-McBrien.

The Mana Moana Experience is a specialist Pasifika Leadership Programme run by Leadership NZ that activates the rich wisdom of Pasifika ancestral and indigenous knowledge delivered through language and culture to current and future Pasifika leaders within New Zealand. It embeds the poly-cultural leadership wisdom required in these times, creating Pasifika conscious leaders. Leaders in the south carry great responsibility as community leaders and the Mana Moana Experience will support and build their capacity to lead while creating connections with other Pacific leaders throughout the country.

For the first time Community Trust South has offered a Mana Moana Leadership scholarship which enables a Pasifika leader from our region to attend the 8-month leadership course. Apoua Fuatavai-McBrien is the Trust’s inaugural recipient of this scholarship.

“There are leaders from communities from all parts of New Zealand and the magic of the course is the sharing of

experiences and the connections you make. You connect through rediscovering our language and find tools in our culture that opens up a new view on what leadership is. The bigger cities have larger Pasifika communities and more resources, in Southland we have a different way of working, with our smaller communities we work together more collaboratively. One of the bigger outcomes is the friendships and connections that are being made.” Apoua Fuatavai-McBrien.

Apoua works for the Southland Beneficiaries and Community Rights Centre and is president of the Invercargill branch of the Pacific Allied Women’s Council. Apoua has always been heavily involved in her community, spearheading a number of projects over the years with a focus on supporting youth and Pasifika women in Southland.

“This is the best training I have ever experienced. These are old concepts but presented in a new way.” Apoua Fuatavai-McBrien.



Apoua Fuatavai-McBrien - Photo credit Ralph Brown

HEALTH, WELLBEING AND ACTIVE LIFESTYLES

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



SOUTHLAND LOCATOR BEACON CHARITABLE COMPANY – DIGITIZATION OF THE HIRE SYSTEM



John Munro - Southland Locator Beacon

The Southland Locator Beacon Charitable Company formed in 1995 for the specific purpose of establishing an emergency locator beacon system in Southland. Today with 600 beacons available for hire from 89 outlets throughout the country the company has grown to be NZ's biggest supplier of personal locator beacons. Its main objective - to save lives and rescue those who became lost or injured.

In the ten-year period prior to the deployment of the beacons, 21 people lost their lives in Southland's remote back country. Since the introduction of personal locator beacons, 650 people have been rescued, 150 of which may well have lost their lives.

Community Trust South funded the establishment of the emergency locator beacon system in 1996 and continue to show commitment to the organisation through additional funding for their new digital platform. It is time for the current system, which is heavily reliant on outdated fax and paper technology, to go digital.

"Converting to a digital platform will be transformational - people will be able to enter their own details via tablets - which will be saved on a central system accessible by the National Rescue Co-ordination Centre, NZ Police, LandSAR and the Fire Service. While it will create efficiencies by reducing the administrative burden, it will also save precious time so that rescue operations can be initiated without delay." John Munro – Director Southland Locator Beacon Charitable Company.

Survivor Story – We hoped the technology was working.

We were told about the Five Passes walk by hiking friends. We knew the walk would be a challenge and set off with an abundance of food and gear to cover the many possible eventualities we might encounter. On the 4th day we set off towards Park Pass. The track led us between two car sized boulders, as I walked through, I heard a crack as my foot went through some dead wood. I heard movement and a rock previously supported by the log came away. The rock rolled down onto me crushing my arm and hips on the boulder below. The rock then rolled onto my leg, slicing a wide deep gash down to the muscle. Luckily, the rock continued to roll off me and down the slope, leaving me free but badly hurt and in shock.

My wife set off the emergency locator beacon we had rented from the DOC office for \$40. She bound my leg, moved me onto a thermo-mat, and laid out my bright orange pack liner to mark us out for the helicopter.

The beacon had a reassuring green light confirming a strong GPS signal and as we waited, we hoped that the technology was working. After an hour and a half, the low thumping sound of a helicopter could be heard and Mike and Gary, the two-man search and rescue team, were with us shortly. The helicopter landed elegantly, balanced on the rocky outcrop, and we were whisked away to the safety of Wanaka. The Otago Rescue Helicopter Trust then carried me into Dunedin Hospital. I spent New Year's Eve in surgery having my cut cleaned and a metal plate put into my arm.

You do not know where or when an accident will occur, but you can plan for what happens when it does. If you have a serious accident in the backcountry, then without an emergency locator beacon you have no options – with a beacon we were rescued in under two hours. Best \$40 I ever spent. S.N. – Locator Beacon Customer and Survivor.

INVEST SOUTH

100% owned by Community Trust South, Invest South is a trusted, independent, and local investor with a 20+ year record as a strong catalyst in our region's economic growth.

Invest South focuses on making investments in businesses with their hearts in the Community Trust South region. The fund uses its established networks, collective experience, and hands on management support to assist local businesses with long term growth strategies seeking capital and expertise for growth.

This is achieved through a collaborative approach with management teams to ultimately increase and realise the value of those businesses.

Invest South has a reputation built on genuine partnerships, positive collaborations, and successful support of businesses seeking both capital and expertise for growth.

With investments in businesses in diverse sectors across the region and further afield, all returns from the fund are invested back into the community.

INVESTMENT HIGHLIGHTS

FIORDLAND LOBSTER

Fiordland Lobster Company is dedicated to the sustainable fishing and live export of wild-caught southern rock lobster.

In 1989, 15 Fiordland fishers created the Fiordland Lobster Company and began exporting their lobsters live for the first time.

Invest South has been an investor in the company since 2009 and has supported its growth aspirations with capital and access to its networks, as it has expanded beyond its New Zealand origins.

As New Zealand's largest lobster exporter, the company's head office is still proudly based in Te Anau, with lobster receiving depots and export packing factories located throughout New Zealand and Australia.

Invest South is a strong and active supporter of the company's vision to be the most innovative and progressive lobster company on the planet.

Bryan Henderson, Chair:

"Invest South has been a cornerstone shareholder for over ten years. Its contribution goes beyond the capital investment that it has in the company. Invest South brings additional value through its investment networks and by engaging with the Board and the company in a constructive and informed way. The Board and the company value the partnership with Invest South."



ENPOT LIMITED

EnPot is a patented technology that fundamentally changes the way aluminium smelters use energy to produce aluminium.

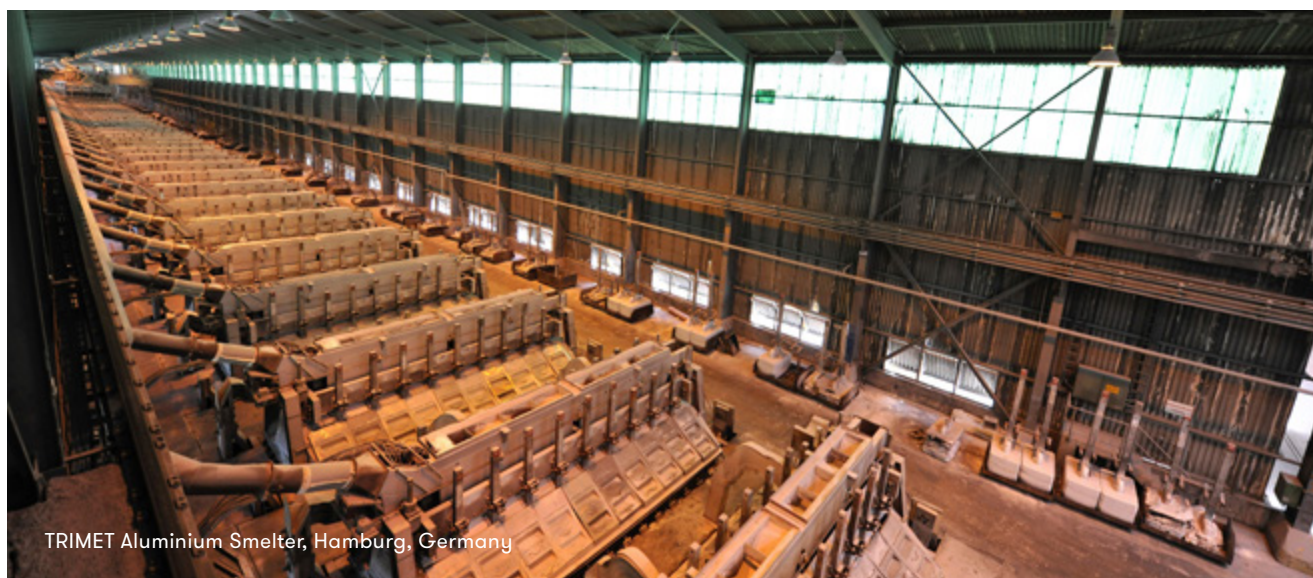
For the last 130 years smelters have been unable to modulate their energy consumption for fear of disrupting the critical heat balance required. With EnPot, smelters can use 30% more or less electricity, providing huge operational advantages and enabling them to run off renewable generation.

The technology reinvents smelters into ‘virtual batteries’, supporting the world’s electricity grids to adopt variable renewable energy faster by providing a reliable supply of back-up electricity. Smelters equipped with EnPot technology allow the aluminium industry to become a critical player in the drive to decarbonise our global energy system, as we transition through to 100% renewable generation.

EnPot Limited is majority-owned by Yunca Holdings Limited, a leading manufacturing and engineering company based in Southland, New Zealand. Invest South joined Yunca and Auckland UniServices (the commercialisation arm of Auckland University) as a shareholder in 2019 and is actively involved in supporting the business as it moves towards commercial adoption of this exciting technology across the globe.

Karyna Young, Chair and CEO:

“When the EnPot team opted for an investment partner to help drive our next stage of growth, we immediately looked to Invest South. Whilst the funding element is of course important, their unique selling point was their experienced, well networked and commercially astute team that we knew would add immediate value to our company. And they have delivered. Commercialisation of EnPot has been fast-tracked under their watch – no mean feat during a global pandemic. In our experience, Invest South has been an exceptional investor offering extremely good support at all levels of our operation.”



TRIMET Aluminium Smelter, Hamburg, Germany

Rārangi Tuku Pūtea – Grants Listing

GRANTS APPROVED FOR YEAR ENDED 31 MARCH 2021

Age Concern Southland	58,000	Disc Golf Wanaka	2,000
Alzheimers Society Otago	5,000	Donovan Primary School	12,540
Alzheimers Society Southland	7,500	Drummond Primary School	2,018
Anderson House Trust	1,000	Dunedin Diocesan Trust Board	10,000
Aparima College	5,197	East Gore School	15,156
Aphasia New Zealand Charitable Trust	1,000	Eastern Southland Basketball Association	9,600
Arrowtown Autumn Festival	5,000	Eastern Southland YFC Southern Field Days	3,000
Arrowtown Bowling Club	40,000	Edendale Primary School	4,373
Arrowtown School	15,347	EDUK8 Southland	35,000
Arts Murihiku Charitable Trust	22,500	Equestrian Sports New Zealand	5,500
Ascot Community School	9,878	Fernworth/Te Kura O Whare Pā	
Athletics Southland	7,550	Primary School	8,885
Aurora College	14,206	Fiordland College	6,531
Autism New Zealand	5,000	Fiordland Community Events Centre Trust	60,000
Balfour School	2,668	Fiordland Community House	38,000
Barnardos New Zealand	40,000	Fiordland Health Trust	40,000
Bellyful New Zealand Trust	1,000	Fiordland Players	2,000
Blue Mountain College	5,417	Fiordland Search and Rescue	3,000
Bluff Hill Motupōhue Environment Trust	16,000	First Church Heritage Building Charitable Trust	34,529
Bluff School	5,405	Garston School	1,589
Borland Lodge Adventure and Education Trust	10,000	Glenham School	1,500
Bowls Southland	18,500	Glenorchy School	1,500
C S Art Charitable Trust	15,000	Golf Southland	30,150
Cancer Society of New Zealand, Otago and Southland Division	29,350	Gore Agricultural and Pastoral Association	10,000
CareerFest Southland	2,500	Gore and Districts Motorcycle Club	5,400
CCS Disability Action Southland	35,000	Gore and Districts Senior Citizens Club Choir	1,000
Central Lakes Family Services	115,000	Gore Country Music Club	3,000
Central Southland College	13,620	Gore District Council	8,500
Central Southland Hospital Charitable Trust Board	10,500	Gore High School	11,563
Chamber Music New Zealand Trust Board	10,000	Gore Main School	5,407
Chamber of Commerce Southland	4,000	Gore Musical Theatre	7,500
Children's Day Committee Invercargill	2,000	Gore Parents Centre	5,000
Christmas In The Theatre	2,000	Gore Southern Shears	5,000
Citizens Advice Bureau Invercargill	5,000	Gorge Road School	1,500
Citizens Advice Bureau Queenstown	10,000	Greenvale Dog Trial Club	5,000
City of Invercargill Highland Pipe Band	6,000	Grey Power Southland Association	8,000
Clifden School Playgroup	400	GymSports New Zealand	13,510
Community Networking Trust Eastern Southland	12,500	Halfmoon Bay School	1,500
Croquet Southland	4,930	Happiness House Trust	24,500
Cycling Southland	28,670	Hauroko Valley Primary School	2,781
Cystic Fibrosis Association of New Zealand	2,500	Head Injury Society of Southland	7,500
Dan Davin Literary Foundation	10,000	Heartland Cricket Trust	3,000
Dipton School	1,921	Heddon Bush School	1,729
Disabilities Resource Centre Southland Charitable Trust	15,000	Hedgehope School	1,500
		Hedgehope Glencoe Community Centre	2,600
		Heriot School	2,018
		Heritage South	6,400

Hillside Primary School	1,500	Newfield Park School	7,882
Hockey Southland	21,460	Northern Southland College	5,400
Hollyford Conservation Trust	20,000	Northern Southland Community Pool Trust	30,000
Ice Sports Southland	5,300	Northern Southland Community Resource Centre Charitable Trust	16,500
Indian Community Southland	8,000	Northern Southland Medical Trust	5,000
Invercargill Contract Bridge Club	1,000	Northern Southland Reforestation Trust	5,000
Invercargill Gymnastic Club	6,000	NZ Family and Foster Care Federation	8,000
Invercargill Middle School	5,345	Ohai Senior Citizens	1,000
Invercargill Musical Theatre	20,000	Oreti Surf Life Saving Club	4,700
Invercargill Potters	1,000	Otago Southland Area of New Zealand Pony Clubs Association	5,000
Invercargill Secondary Schools' Network Trust	90,000	Otama School	1,500
James Hargest College	37,564	Otatara School	6,842
Jubilee Budget Advisory Service	10,000	Otautau and District Community Charitable Trust	18,000
Kingsview School	2,379	Otautau Bowling Club	2,000
Knapdale School	1,563	Otautau Community Swimming Pool	34,850
Lake Hayes Estate and Shotover Country Community Association	10,000	Otautau School	16,578
Leadership New Zealand Trust	25,000	Pacific Island Advisory and Cultural Trust	61,000
Learning Differences Aotearoa Trust	19,500	Parata Anglican Charitable Trust	40,000
Leukaemia & Blood Cancer New Zealand	5,000	Parent to Parent Southland	7,500
Life Education Trust Heartland Otago Southland	7,205	People First New Zealand	2,500
Life Education Trust Southland	17,141	Philanthropy New Zealand	4,560
Lighthouse Southland	20,000	Phoenix Synchro Southland	7,300
Limehills School	5,247	Pirates Old Boys Rugby Club Invercargill	2,200
Lions Club of Ohai Nightcaps	700	Poppycok Trust	13,860
Lochiel School	2,837	Pregnancy Help Invercargill	5,000
Longford Intermediate	6,434	Presbyterian Support Southland	140,000
Loss and Grief Support Trust Southland	37,600	Pukerau School	1,906
Love Local Charitable Trust	7,500	Queens Park Association Football Club	2,000
LUMA Light Festival Trust	30,000	Queenstown Alpine Ski Team	9,390
Lumsden School	2,652	Queenstown Art Society	7,500
Makarewa School	3,276	Queenstown Childcare Centre	9,000
Mararoa School	1,680	Queenstown Ice Hockey Club	2,410
Marching Southland Association	5,330	Queenstown Lakes Baby Box Charitable Trust	20,000
Mataura & Districts Senior Citizens Association	1,000	Queenstown Lakes District Council	58,000
Mataura School	5,178	Queenstown Mountain Bike Club	10,890
Mataura Youth Centre Trust	5,000	Queenstown Primary School	19,250
Menzies College	8,546	Queenstown Writers and Readers Festival Charitable Trust	5,000
Miharo Murihiku Trust	105,000	Remarkable Theatre	3,500
Mobility Assistance Dogs Trust	2,000	Remarkables Primary School	16,963
Mossburn Community Facilities	5,000	Rimu Full Primary School	3,511
Mossburn Community Pool	12,000	Riversdale Arts	8,000
Mossburn School	1,747	Riversdale School	3,150
Murihiku Young Parents Learning Centre	1,000	Riverton Community Arts Centre Charitable Trust	8,000
Myross Bush School	13,901	Riverton Community Charitable Trust	18,000
National Heart Foundation of New Zealand	8,500	Riverton Primary School	5,088
Netball South Zone	153,040	Riverton Senior Citizens Association	2,000
New River Primary School	8,785	RMH South Island Trust	20,800
New Zealand Council of Victim Support Groups	17,000		
New Zealand Country Music Festival Trust	20,000		
New Zealand Songwriters Trust	6,875		

Rārangi Tuku Pūtea – Grants Listing

GRANTS APPROVED FOR YEAR ENDED 31 MARCH 2021

Road Safety Education	2,000	Southland Justices of the Peace Association	1,500
Ronald McDonald House Charities		Southland Kiribati Community and Youth	5,000
New Zealand Trust	34,800	Southland Literacy Association	2,358
Roslyn Bush Playcentre	5,750	Southland Locator Beacon	75,000
Royal New Zealand Foundation of the Blind	16,500	Southland Mountain Bike Club	7,490
Royal New Zealand Plunket Trust	47,000	Southland Multicultural Council	38,000
Rugby Southland Incorporated	154,860	Southland Multiple Sclerosis Society	15,000
Ruru Specialist School	2,507	Southland Musicians Club	4,000
Sacred Heart School	2,457	Southland Otago Axemen's Centre	2,000
Salford School	7,592	Southland Regional Development Agency	200,000
Scholarships - Create	3,150	Southland Regional Heritage Committee	15,000
Scholarships - Leadership	2,500	Southland Schools Pipe Band Programme Trust	20,000
Scholarships - Sport	500	Southland Secondary School Sport	20,817
Sharks Basketball	70,000	Southland Shafts and Wheels Society	5,000
Shotover Primary School	15,255	Southland Softball Association	15,340
Show Me Shorts Film Festival Trust	1,514	Southland Table Tennis Association	8,930
Snow Sports New Zealand	5,000	Southland Teachers and Judges of Highland and National Dancing	1,980
Southern Grass Kart Club	3,000	Southland Tennis Association	11,850
Southern REAP	57,146	Southland Triathlon and Multisport Club	6,980
Southern Zone of NZRL	3,000	Southland Warm Homes Trust	25,000
Southland Amateur Rowing Association	8,050	Southland Water Polo Club	12,590
Southland Adventist Christian School	2,230	Southland Women's Club	3,750
Southland Art Society	8,000	Southland Workers' Educational Association	27,000
Southland Asthma Society	10,000	Southland Yachting Association	6,130
Southland Badminton Association	14,690	Southland Youth One Stop Shop	70,000
Southland Basketball Association	27,960	Special Olympics Southland	16,500
Southland Beneficiaries and Community Rights Centre	31,000	SPELD NZ	11,000
Southland BMX Club	69,990	Spirit Army Charitable Trust	45,000
Southland Board Riders Association	4,730	Sport Otago	15,000
Southland Boys' High School	24,659	Sport Southland	418,858
Southland Canoe Club	5,550	Squash Southland	14,150
Southland Chevrolet Club	5,700	St John's Girls' School	3,372
Southland Competitions Society	5,000	St Joseph's School Invercargill	5,277
Southland Cricket Association	28,470	St Joseph's School Queenstown	3,929
Southland Darts Association	4,900	St Mary's School Gore	6,348
Southland Deaf Community	1,500	St Patrick's School Nightcaps	1,500
Southland Disability Enterprises	30,000	St Patrick's School Invercargill	9,675
Southland District Rugby Football League	8,280	St Peter's College	10,176
Southland Fijian Community	2,000	St Teresa's School Bluff	1,500
Southland Filipino Society	7,500	St Theresa's School Invercargill	7,215
Southland Foodbank Trust	15,000	St Thomas School Winton	2,981
Southland Football	35,090	Stadium Southland	23,000
Southland Girls' High School	24,958	Stewart Island Senior Citizens	2,000
Southland Hindi School Charitable Trust	3,000	Stewart Island Rakiura Community and Environment Trust	5,000
Southland Indoor Bowls Centre	7,740	Storytime Foundation Trust	3,500
Southland Indoor Leisure Centre Charitable Trust	250,000		

Swimming Southland	18,550	Verdon College	17,694
Takitimu Community Development Committee	13,000	Volleyball Southland	18,440
Takitimu Primary School	2,886	Volunteering New Zealand	26,245
Talent Development Southland Charitable Trust	50,000	Waianiwa school	1,656
Talk Link Trust	15,000	Waiau Area School	4,984
Tangata Whenua, Community and Voluntary Sector Research Centre	3,000	Waihopai City Lions Club	5,000
Tapanui School	2,837	Waihopai School	36,706
Te Anau Clay Target Club	5,000	Waikaia School	1,500
Te Anau Community Events Charitable Trust	23,000	Waikaka Primary School	1,921
Te Anau Golden Age Club	1,500	Waikoiko School	1,500
Te Anau School	8,518	Waimea Plains Ploughing Association	5,611
Te Anau Tennis Club	6,400	Waimumu Te Tipua Art and Craft Exhibition	2,000
Te Runaka o Awarua Charitable Trust	50,000	Wakatipu Anglers Club	5,000
Te Tipua School	1,500	Wakatipu Branch of the Central Otago Pony Club	1,158
Te Wharekura o Arowhenua	6,504	Wakatipu Community Foundation	70,112
The Boys' Brigade in New Zealand	4,000	Wakatipu High School	24,943
The CanInspire Charitable Trust	2,000	Wakatipu Youth Trust	40,000
The Community Trust of Wellington	7,600	Wallacetown Community Centre	2,500
The Conductive Education Southern Charitable Trust	20,000	Wallacetown School	2,314
The Girl Guides Association New Zealand	5,000	Wallacetown Senior Citizens	1,000
The Glenorchy Marketplace	20,000	Waverley Park School	13,948
The Hearing Association Southland Branch	12,000	Wendonside Waikaia Tennis	10,000
The Invercargill City Charitable Trust Board	4,348	West Gore School	6,818
The Motor Neurone Disease Association of New Zealand	5,000	West Otago Rose Society	1,200
The Nattering Knitter	5,000	Windsor North School	9,288
The Queenstown Associated Football Club	1,650	Winton Football Club	1,000
The Routeburn-Dart Wildlife Charitable Trust	12,000	Winton School	8,774
The Royal New Zealand Ballet	10,000	Woodlands Full Primary School	2,789
The Salvation Army New Zealand Trust	15,000	Wyndham School	3,772
The South Centre Anglican Care Trust	30,000	Youth Development Southland Region Trust	70,000
The Southern Regions Branch of the Muscular Dystrophy NZ Association	3,500	Youthline Southland Charitable Trust	6,000
The Southland Christmas Parade Charitable Trust	15,000	Total Grants Approved	5,870,715
The Stewart Island Promotion Association	18,865	LESS:	
The Stroke Foundation of New Zealand Trust	5,000	Grants committed in principal	92,066
The Theatre in Health Education Trust	2,500	Grants repaid	43,920
The Young Men's Christian Association of Invercargill Charitable Trust	45,000	Grants written off	301,574
Thornbury School	2,198	Murihiku health scholarships repayable	15,000
Three Lakes Cultural Trust	15,000		452,560
Tisbury School	3,924		5,418,155
Tokanui School	2,475		
Touch Southland	53,210		
Tuatapere Community Worker Support Trust	13,000		
Tuatapere Medical Services Trust	30,000		
Tuatapere Toy Library	5,000		
Tuturau Primary School	1,500		
Tuurama Trust	10,000		

Community Trust South

Summary of Financial Statements

For Year Ended 31 March 2021

in New Zealand Dollars (\$000s)

TRUSTEES' RESPONSIBILITY STATEMENT

The Trustees of Community Trust South ("the Trust") are pleased to present the summary financial statements for the year ended 31 March 2021.

The Trustees are responsible for presenting financial statements in accordance with New Zealand law and generally accepted accounting practice, which present fairly the financial position of the Trust and Group as at 31 March 2021 and the results of their operations and cashflows for the year ended at that date.


The Trustees consider the summary financial statements of the Trust have been prepared using accounting policies which have been consistently applied and supported by reasonable judgements and estimates and that all relevant financial reporting and accounting standards have been followed.

The Trustees believe that proper accounting records have been kept which enable with reasonable accuracy, the determination of the financial position of the Trust and facilitate compliance of the financial statements with the Financial Reporting Act 2013.

The Trustees have responsibility for the maintenance of a system of internal control designed to provide reasonable assurance as to the integrity and reliability of financial reporting. The Trustees consider that they have taken adequate steps to safeguard the assets of the Trust, and to prevent and detect fraud and other irregularities.

The Summary Financial Statements are signed on behalf of the Board by:


Board Chair
28 July 2021


Trustee
28 July 2021

SUMMARY STATEMENT OF COMPREHENSIVE REVENUE AND EXPENSE

For year ended 31 March 2021

	Group	
	2021	2020
Revenue		
Revenue from investing activities	46,421	(2,063)
Share of profit from associates	394	(1)
Total revenue	46,815	(2,064)
Operating expenses		
Investing activity expenses	1,749	1,706
Trust expenses	1,152	1,284
Impairment loss	-	2,349
Grants committed to community groups	5,418	7,498
Discount on concessionary loans	(27)	(118)
Total expenses	8,292	12,719
Net income/(deficit) before taxation	38,523	(14,783)
Net income/(deficit) after taxation	38,523	(14,783)
Other comprehensive income	-	-
Total comprehensive (deficit)/income for the year	38,523	(14,783)
Total comprehensive (deficit)/income is attributed to:		
Owners of the parent	38,523	(14,783)
	38,523	(14,783)

SUMMARY STATEMENT OF CHANGES IN NET ASSETS/EQUITY

For year ended 31 March 2021

Group	Trust Capital	Capital Maintenance Reserve	Grants Maintenance Reserve	Asset Revaluation Reserve	Accumulated Revenue and Expense	Total
Opening balance at 1 April 2019	158,460	106,893	(33,449)	398	-	232,302
Total comprehensive revenue and expense	-	-	-	-	(14,783)	(14,783)
Transactions with owners						
Transfer to/(from) reserves	-	6,172	(20,955)	-	14,783	-
Closing balance at 31 March 2020	158,460	113,065	(54,404)	398	-	217,519
Total comprehensive revenue and expense	-	-	-	-	38,523	38,523
Transactions with owners						
Transfer to/(from) reserves	-	3,796	34,727	-	(38,523)	-
Closing balance at 31 March 2021	158,460	116,861	(19,677)	398	-	256,042

SUMMARY STATEMENT OF FINANCIAL POSITION

As at 31 March 2021

in New Zealand Dollars (\$000s)

	Group	
	2021	2020
Current assets	1,162	1,232
Non-current assets	261,264	223,584
Total assets	262,426	224,816
Current liabilities	3,831	4,706
Non-current liabilities	2,553	2,591
Total liabilities	6,384	7,297
Net assets	256,042	217,519
Net assets/equity comprise:		
Net assets/equity attributable to equity holders of parent	256,042	217,519
	256,042	217,519

SUMMARY STATEMENT OF CASH FLOWS

For year ended 31 March 2021

	Group	
	2021	2020
Cash (outflow) from operating activities	(1,775)	(6,828)
Cash from investing activities	1,451	5,717
Net (decrease) in cash held	(323)	(1,111)
Add cash at beginning of year	415	1,526
Total cash balance at end of year	92	415
Represented by		
Cash and cash equivalents	92	415
Total cash balance	92	415

SUPPLEMENTARY INFORMATION

Trustee fees

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

	2021	2020
Bill Moran (appointed June 2019)	17	13
David Goble (appointed June 2019)	15	12
John Wyeth (retired October 2020)	8	14
Kirsty Pickett (appointed September 2020)	9	-
Lindsay Wright	17	19
Louise Fowler (appointed September 2020)	9	-
Margot Hishon (retired May 2019)	-	5
Mata Cherrington	14	14
Michael Wilson	14	14
Penny Simmonds (retired September 2020)	7	25
Richard Wason (retired September 2020)	7	16
Stephen Canny (appointed June 2019)	14	12
Stephen O'Connor (retired May 2019)	-	2
Trish Boyle	27	14
Warren Skerrett (retired May 2019)	-	3
	158	163

Grants

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.

	Group	
	2021	2020
Grants approved in current year	5,871	7,763
Grants withdrawn for current year	(57)	(30)
Grants withdrawn for prior years	(245)	(72)
Grants repaid	(44)	(28)
Scholarships repayable	(15)	(18)
Grants approved in principal relating to future years	(92)	(117)
	5,418	7,498

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 28 July 2021 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

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 28 July 2021.

Auditor's Report

Report of the independent auditor on the summary financial statements

To the Trustees of Community Trust South

The Summary Financial Statements comprise:

- the summary statement of financial position as at 31 March 2021;
- 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 controlled entities (the Group) for the year ended 31 March 2021.

In our opinion, the accompanying consolidated Summary Financial Statements are consistent, in all material respects, with the audited consolidated financial statements, in accordance with 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 Entity Standards Reduced Disclosure Regime. 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 28 July 2021.

Information other than the consolidated Summary Financial Statements and auditor's report

The Trustees are responsible for the consolidated Summary Financial Statements. Our opinion on the consolidated Summary Financial Statements does not cover the other information included in the consolidated Summary Financial Statements and we do not express any form of assurance conclusion on the other information.

In connection with our audit of the consolidated Summary Financial Statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the consolidated

Summary Financial Statements, or otherwise appears to be materially misstated. If, based on the work we have performed on the other information, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

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 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 the 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.

The engagement leader on the audit resulting in this report of the independent auditor on the Summary Financial Statements is Robert Harris.

For and on behalf of:



Chartered Accountants
28 July 2021

Dunedin



TE POU ARATAKI POUNAMU O MURIHIKU

In 2007 the Ngāi Tahu Rūnanga of Murihiku gifted to Community Trust South this name which means the stanchion that all pathways in Murihiku lead to where people obtain the treasures that enable them to fulfill their aspirations.



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