



# ANNUAL REPORT



# WELCOME



## FROM THE EXECUTIVE DIRECTOR

This year has been a year of growth for The Gift Trust, but we've remained true to our roots by doing what we do best: helping people spread their generosity to those who need it most.

We've grown in size and now manage \$5.16 million on behalf of our generous donors. This year we donated \$185,399 to good causes, bringing our total donations to \$843,560 since The Gift Trust started.

It's our donors that are at the heart of what The Gift Trust does and we're lucky to work with an incredibly diverse and interesting group of donors. We welcomed some new high profile donors this year, including the Namaste Foundation, who transferred some of their funds from the US to The Gift Trust for their NZ giving. We also welcomed several new private donors and families looking to simplify their charitable giving.

There is a story behind every donation because everyone gives for very personal reasons. Whatever the reason, we're here to make giving easy and fun. We're proud to play a part in that.

Thank you to all our donors, partners, supporters and team for a wonderful year.

– Cheryl Spain, Executive Director



## FROM THE CHAIR

The Gift Trust has an experienced board of trustees which oversees the trust's governance. We're delighted with our growth and the progress Cheryl and the team are bringing as we develop our mission of encouraging generosity in New Zealand.

A major highlight this year was the launch of our partnership with Consilium, a financial services firm. Their network of over 100 financial adviser firms can now offer The Gift Trust's philanthropic services to their clients, while the adviser continues to manage the donors' funds. This is a New Zealand first.

We also welcomed David Woods to our board of trustees. He brings a wealth of experience in impact investment. And we've grown our staff bringing on a new Administrator, Dayna Carter, who is keeping the team organised.

The Gift Trust is in a strong position for 2018-19. We look forward to working with donors and partners to benefit charitable causes.

– Glen Saunders, Chair

On behalf of the trustees: Anake Goodall, David Woods, Doris Zuur, Philip McKinstry.

# OVERVIEW

2017-2018 Financial Year

**\$5.16 million**  
total donor funds  
under management

**\$185,399**  
donations made  
to charities

**+60%**  
more donations  
made than  
previous year

**\$1.31 million**  
new donor funds  
received

**67**  
donations made

**\$30,000**  
largest donation

**\$843,560**  
All donations made  
to date

Our audited financial accounts can be found  
at [www.thegifttrust.org.nz/about-us](http://www.thegifttrust.org.nz/about-us)

## Growth

During 2017-2018 we have been focused on growth and attracting new donors, while supporting existing and potential donors with their giving.

## Total donor funds



# Donors' grants to date



- Arts, Music & Culture
- Education
- Community
- Health + Social Services
- Environment
- Youth
- Religion

# Support

Throughout the year we worked with our donors to provide due diligence and research, to ensure their donations have impact.

We provide support for various donations including capacity building/development grants, suspensory loans and donations to new entities.

# A unique partnership

We formed a new partnership with financial services firm Consilium, allowing their network of financial advisers to offer The Gift Trust service to their clients, whilst the advisers manage the charitable funds for growth. This is a first for New Zealand.

“The Gift Trust offers an opportunity to streamline the gifting process, while adding increased confidence and transparency. It also provides robust due diligence of eligible charities and access to additional support services for clients with complex needs.

— Philip Stevenson, Financial Adviser, Bloomsbury Associates

# HIGHLIGHTS



Arianna Ormond, Scholarship recipient



Photo: HRMI

## RocketLab: Launching Brighter Futures

The Gift Trust is delighted to be working in partnership with Rocket Lab, the cutting edge aerospace company, to administer their corporate donations programme. Rocket Lab will donate an annual scholarship to encourage students from the Mahia peninsula and greater Wairoa region to pursue university studies in science, technology, mathematics and engineering.

In December 2017, Rocket Lab announced Arianna Ormond, a Year 13 student from Wairoa College, as their inaugural winner of this scholarship. Arianna will be studying towards a Bachelor of Computing and Mathematical Science at Waikato University. She will receive a scholarship to cover up to \$20,000 of tertiary education fees for up to four years of study, plus will receive hands-on mentoring from Rocket Lab.

If you'd like to speak to us about administering your company giving programme, please contact us.

## Supporting Human Rights

Until now, the world has not had a simple, transparent way to monitor how people are treated. This was a problem. When something is not measured, it is easily overlooked and undervalued. The Human Rights Measurement Initiative fills this gap. They are producing a free easy-to-access database, summarising human rights performance in countries around the world. With a good set of measures it will be easier to improve human rights.

On behalf of three of our generous donors, including the Namaste Foundation, The Gift Trust made a donation of \$21,250 to the Human Rights Measurement Initiative (HRMI). HRMI's purpose is to measure human rights performance in countries around the world, in order to inspire more ethical behaviour by states and other actors. This work is hosted by Motu Economic and Public Policy Research in Wellington.



Guardians of the Bay of Islands Trust



Good SAM app

## Strengthening green charities

When you're a small charity, scraping together the cash for professional development like a fundraising or marketing course can be tough, but the rewards could be huge.

One of our donors provided funds to enable small environmental charities to access training. The Gift Trust ran an application process for this donor and enabled 31 people from 17 environmental organisations to attend a course run by a nationwide training provider Exult. The courses included Sustainable Funding, Secrets of Sponsorship, Marketing on a Shoestring and Growing Great Ideas.

**“The Sustainable Funding workshop enabled us to identify opportunities to diversify and prioritise our income channels.”**

- Richard Robbins, Guardians of the Bay of Islands Trust

## A community of lifesavers

If your heart stops beating, a 10 minute wait for an ambulance might be too long. Every minute without CPR reduces a victim's chance of survival by 10 per cent. What if a trained nearby first aiders could be sent to assist you faster?

There's an app for that. Operating internationally, the GoodSAM (Good Smartphone Activated Medics) is an advanced emergency alerting platform to speed up a first response for cardiac arrests.

In 2017, a Gift Trust donor covered the New Zealand implementation costs of \$35,000 for this project. This project launched in early 2018.

If you are trained in CPR, you can sign up at [www.goodsamapp.org/regResponder](http://www.goodsamapp.org/regResponder).



# ABOUT THE GIFT TRUST

**Our mission is to help people donate to the charitable causes they care about more easily and effectively.**

We all want something in the world to change. Maybe you've been fortunate in life and have more than you need and feel you could give back to those less fortunate. The Gift Trust makes it easy for you to give to the causes you care about and create a proactive, strategic approach to your giving.

**We help you rethink when, why and how you give.**

Perhaps there's a cause or an organisation that's special to you. Perhaps giving is a family tradition, or you want to start a family tradition. Whatever the reason, you want a trusted partner who understands you and your goals to help connect your good fortune to people and organisations with world changing ideas, but limited resources.

What if you could support all your favourite charities with just one donation? That's the power of a gift account. A place where you can give, grant and grow your giving. Make your giving experience easy, effective and joyful with The Gift Trust.

**A modern alternative to a private foundation.**

Get in touch to learn more about  
our Gift Accounts:



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