



Our team



Cheryl Spain

EXECUTIVE DIRECTOR



Yvonne Trask

DEVELOPMENT AND
ENGAGEMENT LEAD



Jackson Lacy

OPERATIONS COORDINATOR



Chloe Spedding

PROGRAMME COORDINATOR,
GIFT COLLECTIVE

Our trustees



Philip McKinstry CHAIR



Anake Goodall TRUSTEE



Alanna Irving TRUSTEE



Annette Culpan TRUSTEE



Simone Robbers TRUSTEE



John Prendergast TRUSTEE

The Gift Trust – a year in review

2021-22 has been another extraordinary year for The Gift Trust. We've welcomed many new donors to our whānau, we've grown in size, and we've given more donations to charities than ever before – \$1.8 million this year, and more than \$5 million since we started in 2009. This wonderful milestone shows the incredible generosity of our group of donors!

The people, families, and organisations we work with say they want their giving to shine a light – not on themselves, but on the incredible work that their chosen causes do every day. This report is a celebration of that work. Across Aotearoa New Zealand and indeed the world, The Gift Trust is helping donors make a difference to people's lives.

We also grew our own organisational capacity this year, welcoming Simone Robbers and John Prendergast to our board, and Jackson Lacy and Yvonne Trask to our staff team. Simone is Assistant Governor for Governance, Strategy and Corporate Relations at Reserve Bank of New Zealand – Te Pūtea Matua and has an interest in philanthropy and connecting with communities across New Zealand. John Prendergast is well known and highly respected within the philanthropic sector owing to his experience managing Community Trust South for two decades. He is currently the General Manager of the Catholic Archdiocese of Wellington. John and Simone collectively bring a wealth of expertise to our board.

On the staff side, Jackson Lacy joined us in July 2021 as Operations Coordinator, looking after our donations and keeping our processes on track. A graphic designer by trade, Jackson has a background in local government and the not-for-profit sector. Jackson is studying towards a Masters in Indigenous Studies and his skills in te reo and connection with te ao Māori has been invaluable. Yvonne Trask joined us as our Development and Engagement Lead in September 2021. Yvonne has a long history in the philanthropic sector with a broad network both locally and internationally, having been Relationships and Events Manager at Philanthropy New Zealand for eleven years. She's responsible for helping our donors with charitable research to find the causes that match their passions, spreading the word about The Gift Trust and attracting more donors.

With new team members, board members, and more donations and gifts than ever,

we're making good happen, together.

**Cheryl Spain (Executive Director)
and Phil McKinstry (Chair)**



Our donor's remit was clear: he wanted to support hands-on, locally-led, practical environmental work with a strong volunteer presence.

Supporting and finding **locally led** projects

While some donors choose to support causes across the motu and around the world, others choose to benefit those far closer to home. The term 'locally led' is growing in popularity around the world as a hallmark of great not-for-profit management, and we've found some excellent examples of organisations who are embedded in their communities and who understand the local needs.

When one of our donors was interested in supporting locally-led environmental projects in the lower North Island, he contracted The Gift Trust to do some research and run an application process to find organisations.

Our donor's remit was clear: he wanted to support hands-on, locally-led, practical environmental work with a strong volunteer presence.

We sought out a large group of possible organisations, established a short application form for expressions of interest, and then assessed the applications that came in.

The lower North Island is an interesting region, environmentally speaking: several large bird sanctuaries, wetlands being restored, riparian planting around rivers, native plantings around regional parks, and



the restoration of beach habitats. We enjoyed finding the applications that best met our donor's criteria and learned so much from the process. The donor has now given gifts totalling \$85,000 to seven charities in the first year, and has made commitments to support most of them for up to 4 years.

Some of the organisations supported include Mountains to Sea Wellington Trust, who are working on a project to restore seaweed forests, and Kāpiti Coast Biodiversity Project, who will be working with volunteers to restore and maintain planting and weed control in Queen Elizabeth Park. As we approach the six-month mark, we'll start following up what each organisation does with the funding, tracking their progress and finding others along the way doing new work.

We found another good example of a locally-led organisation responding to local needs when we had the opportunity support Tolaga Bay Inn Charitable Trust on behalf of a donor. This initiative was created by Lily Stender, a Tolaga Bay local who knew what her community needed to prosper.

She created a kaupapa Māori technology hub where locals could learn digital skills to sell their products online, which became even more vital to local businesses once COVID-19 began making its presence felt.

We helped the Trust access just over \$13,000 NZD from an American donor through our partnership with RSF Social Finance, which let the donor receive a US tax benefit for their gift to a NZ project. The donation paid for four scholarships to Tolaga Bay's online business programme, in a great example of global giving for local needs!

Many thanks to our donors for supporting these locally-led projects!

Join the Collective

Some of the most innovative work comes from small, unregistered groups with well-defined charitable purposes, grassroots movements or social enterprises. But as they're not yet registered charities, donors may have difficulty finding these groups and verifying how funding is to be spent. That's why The Gift Trust set up a partnership project, Gift Collective, to be a fundholder or fiscal sponsor for these small Kiwi initiatives with a clear charitable purpose.

Gift Collective has grown massively this year, having now received more than half a million dollars on behalf of more than 25 Collectives (unincorporated groups). We run the project with our partners Open Collective NZ, who provide the software platform that enables Collectives to raise, manage, and spend money with transparency, while we make sure they're meeting New Zealand's legal requirements. Collectives don't need to register as charities, worry about incorporation, or even open a bank account, yet this structure enables their funders to see exactly what they're spending the donations on.

One group Gift Collective is helping is Whakapono – Believe, an art exhibition held in Whanganui to showcase the work of people recovering from drug addiction. Their aim is to reduce stigma by giving the public an opportunity to see the artists as more than the drugs they took to survive the challenges they have faced in the past. Whanganui Community Foundation wanted to fund the exhibition, but encountered

the difficulties of offering funding to an unregistered group. Gift Collective was the missing piece in the puzzle and made a grant possible. The exhibition organisers now have simplified finance processes and robust financial reporting.

Another group using Gift Collective is Tauwi Tautoko, who've raised more than \$30,000 for their work through our service. Their name translates as 'non-Māori in support', and they run a free online course that teaches evidence-backed techniques to counter online racism, hate speech and other harmful beliefs. This amazing course and community (run mostly by volunteers) uses a set of techniques based on listening, empathy, and values-based messaging, which has been shown by research to be effective in shifting the discourse on racism online. Gift Collective gives them the tools to manage their budget, raise funds and spend these resources transparently so they can focus on their work.

If you represent or know of groups looking for a fundholder to help them with their administration and compliance, please visit Gift Collective's website: giftcollective.nz.





Helping children with brain injuries with **life changing** therapy

Receiving a diagnosis that there is 'something wrong' with your child is just devastating - something to which Shirley Wilson, founder of the Brain Injured Children Trust in Tauranga can attest.

The therapy that they provide literally helps children to walk and talk, and so is life-changing for the children and their whānau.

Shirley worked with her disabled son to conquer the odds from that initial diagnosis, supporting him to walk, talk and even complete a university degree. Now she is supporting other families on the same journey.

This small charity with a big impact was gifted \$15,000 from one of our donors this year. That gift has helped the charity to pay for treatment and neural development therapy for children, to support families to adapt their home for their child's safety and to provide transport to and from appointments. The therapy that they provide literally helps children to walk and talk, and so is life-changing for the children and their whānau. We're so proud to help our donors support amazing charities such as these.

Financial overview of the financial year to 31 March 2022

This year in numbers

 **\$13.77m**

TOTAL DONOR FUNDS UNDER MANAGEMENT

 **\$1.79m**

DONATIONS TO CHARITIES

 **\$7m**

NEW DONOR FUNDS RECEIVED

 **\$218k**

LARGEST DONATION TO CHARITY

 **\$8,051**

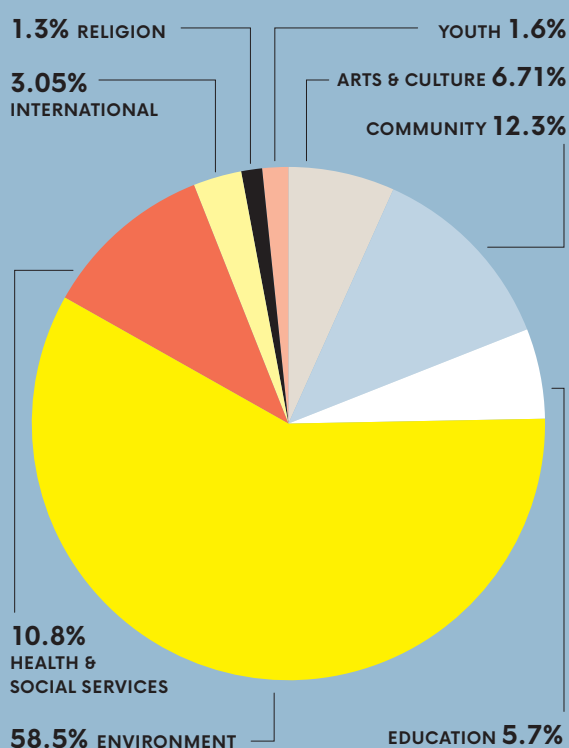
AVERAGE DONATION SIZE

 **\$5.15m**

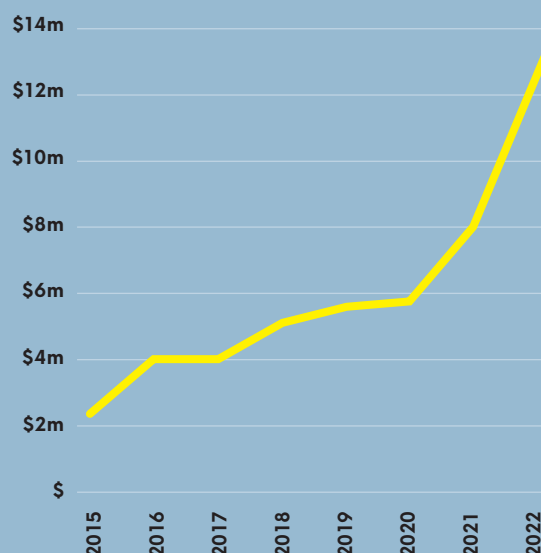
TOTAL DONATIONS TO CHARITIES SINCE THE GIFT TRUST STARTED

To see our full audited financial statements go to thegifttrust.org.nz/financials.

Donations to charities by sector



Total donor funds under management

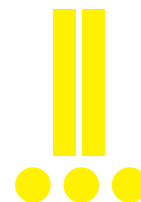


Donation recipients

1 April 2021 to 31 March 2022

350 Aotearoa	Innovative Young Minds	Rites of Passage Foundation
4 A Better City Trust	InterCP	River Aotearoa Charitable Trust
ActionStation	International Youth Initiative Programme	Rod Donald Banks Peninsula Trust
Amnesty International Aotearoa New Zealand	Jane Goodall Institute NZ	Roimata Commons Trust
ARAN Animal Rescue NZ	Kaibosh	Rotorua Community Hospice
Arohanui Strings	Karori Sanctuary Trust	Royal New Zealand Ballet
Asia Harvest Trust	Kia Kotahi Ako Trust	Seed the Change He Kākano Hāpai
Assistance Dogs	KidsCan	SpaceBase Limited
Auckland City Mission	Koanga Institute	Starship Foundation
Australian Earth Laws Alliance	Kootuitui ki Papakura	Supreme Sanitary Pads
Blue Cradle Foundation	Lawyers for Climate Action NZ	Sustainable Business Network
Bright Foundation	Lifeline Foundation Charitable Trust	Te Ara Whatu
Carbon180	Manaiaikalani Education Trust	Te Kuaka (New Zealand Alternative)
Children With Voices	Mankind Project Charitable Trust	Tearfund
Christchurch Foundation	Market Forces	The Aspen Institute New Zealand
Circa Theatre	Maurice White Native Forest Trust	The Learning Environment (Woven Rivers Charitable Trust)
Clean Air Task Force	Mindful Money (Sustainable Initiatives Aotearoa)	The Salvation Army New Zealand
Climate Emergency Fund	Miracle Feet	Tolaga Bay Inn Charitable Trust
Coalition for Rainforest Nations	Mohua Ventures Ltd	Trees That Count (The Project Crimson Trust)
Common Unity	Multicultural NZ	University of Canterbury
DCM (Downtown Community Ministry)	New Zealand Baptist Missionary Society	Upper Hutt Toy Library
Eden Reforestation Projects	New Zealand Festival	Virtuoso Strings
Ekos	New Zealand Opera	Waiheke Budgeting Services Trust
Entheos Foundation	New Zealand Red Cross	Waiheke Island Rudolf Steiner Education Trust
Finding Refuge	OMF Homeside	Wellington City Mission
For the Love of Bees	OMF NZ	Wellington Free Ambulance
Future Whenua Initiative	People's Project (Wise Trust Board)	Wellington Shambhala Centre
Garden to Table Trust	Pet Refuge New Zealand Charitable Trust	Women for Women
Generation Zero	Philanthropy NZ	World Animal Protection NZ
Gillies McIndoe Research Institute	Pixies Animal Rescue Trust	World Future Council
Globaia	Plunket	World Vision
Global Health NZ	Rainforest Foundation US	
Hibiscus Coast Bird Rescue	Rigdzin Bum Tsog Trust	
Hillary Institute of International Leadership		
Hutt Valley Women's Refuge		
Information Technology & Innovation Foundation		

Border crossings – funding charities **around the world**



While we're primarily focused on philanthropy within New Zealand, The Gift Trust has the capacity and flexibility to gift funds around the world, and we enjoy the challenges of extending our services to cross-border giving. Our service means donors can give tax effectively in New Zealand while still supporting projects all over the world (and vice-versa). We help donors by verifying the charitable nature of recipient organisations, and by making sure the funds get to where they are supposed to go.



One of these recipient organisations, gifted \$30,000 by one of our donors, was Children with Voices (CwV), based in Hackney, east London. A single mother of four, CwV manager and founder Michelle Dornelly morphed from running an after-school childcare programme to launching a community food hub in east London during the pandemic. Her work was showcased in a recent article in *The Guardian*, wherein she told stories of the elderly living with no electricity or food in a freezing English winter, and of families struggling on a weekly budget that would barely buy a coffee and a snack in some cafés. Dornelly sharply critiques the British government's lack of action,

especially during the pandemic that has brought a sharp increase in unemployment in Hackney, which is one of the UK's most economically downtrodden areas. Substantial gifts such as that made by our donor can be transformative for small locally-led organisations such as Children with Voices.

Our Gift Accounts allow donors to be far more flexible than other giving mechanisms would allow. One example is from 2021 when we received funds into a Gift Account from a large number of donors that were to be used by an organisation in Malawi for the production and distribution of face masks to protect against COVID-19. Sadly, the charity for which the donations were intended subsequently closed down. Where a more traditional charitable giving structure may be stuck in such a circumstance, the flexibility provided by a Gift Account meant that we could still fulfil our donors' purpose.

We reached out to contacts in Malawi to find an alternative, and were introduced to Supreme Malawi. They're a locally-led social enterprise that sews sanitary pads which they add to menstrual health kits to ensure that women and girls are able to continue working and studying throughout their menstrual cycle. Supreme is part of a consortium initiative called TEAM Girl Malawi, supporting some of the most marginalised girls in the country with education and transition opportunities. As part of this consortium

Supreme runs a 6 month part time skills training program in sewing Reusable Pads, Bags and School Uniforms. This large project reaches rural communities badly impacted by poverty, gender based violence and child marriage. Part of Supreme's training includes the skills to sew face masks, both for themselves and to sell to their communities. Supreme purchases these face masks to donate to other girls in the programme and the girls use the funds they receive to prepare for launching their businesses.

Funding from The Gift Trust's donors helped Supreme purchase more than 1,300 masks from their students to distribute.

One of our most popular collaborative funds (a fund open to public donations) is the Carbon Critical Net-Zero Fund. Set up by two Aucklanders, the fund supports a group of 17 charities working on high-impact climate change solutions, both around the world and here in Aotearoa New Zealand. Although the founding donors provided the start-up funds, it's now open to the public so anyone can have their donations spread across these innovative groups.

Since its founding, the fund has distributed more than \$220,000 to charities like Coalition for Rainforest Nations, whose work helps to protect our fragile tropical rainforests. Based in the US but working internationally (often with developing countries), they seek responsible stewardship of the world's last great rainforests. The Coalition provides practical and policy support to countries working to reduce their emissions under the United Nations Framework Convention on Climate Change, and are making an incredible impact around the world!

Our flexible model lets us allocate a portion of our total gifts in any year for international causes. Talk to us today about how we can help you with your global giving.





Helping whānau in Papakura to thrive

We heard about the work of Kootuitui ki Papakura in south Auckland a few years ago when we were doing some research for a donor, and we found their holistic way of working inspiring. We've now gifted to them several times on behalf of two different families.

Kootuitui ki Papakura works to support the children and whānau of Papakura in three areas: education, health, and homes. In education, they work with teachers at six local schools to develop and improve their teaching and learning methods. They have also recently exceeded 3000 Chromebooks distributed to children attending decile 1 & 2 schools, ensuring equity of online learning access. This led to some incredible innovation during the lockdowns as the teachers found fun, creative ways for children to learn at home using technology.

In health, they provide qualified health practitioners based in local schools to support young people with a wide range of services,

including identification of strep throat, asthma support, immunisation, sexual health, and referrals for social and mental health.

The third strand of their work is in creating warm, dry homes. Working with Habitat for Humanity, the team provides 'winter warm-up packs' with heaters and blankets and supports families by installing insulation. They provide supermarket vouchers, power, water and phone subsidies, transport when needed, and food boxes.

We are delighted to help fund their very practical, needed, and innovative programmes on behalf of our donors.





Flexible funding for all types of causes

One of the benefits of holding a Gift Account with The Gift Trust is the flexibility we have to donate to a wide range of entities, not just registered charities. This means that donors can give tax effectively to a broad range of charitable work, even if the causes they want to support have different structures.

We can support international charities, incorporated societies, social enterprises, or companies with a charitable constitution, as long as the work is legally charitable in NZ.

This gives donors much more flexibility to give tax effectively than if they gave directly. We have to conduct extra due diligence in these cases and it gives donors the assurance that their funds are going to genuinely charitable work.

Several of our donors have interesting examples of these types of donations. The Namaste Foundation (now known as the Biome Fund), have used the flexibility of their Gift Account to make several donations to the social enterprise Happen Films. These

wonderful film-makers create documentary films about social and environmental issues and charitable causes and they sit under our Gift Collective charitable umbrella (see page 4). The Namaste Foundation wanted to support this group that is not a registered charity and The Gift Trust allowed them to do so without getting the organisation tied up in red tape.

Another example is Action Station, an incorporated society who have been supported by several of our donors including Seed The Change | He Kākano Hāpai. Action Station is an independent, crowdfunded, community campaigning organisation who do rapid response, grassroots campaigning.

Our flexible funding model allows our donors to get funding to these types of groups, with the assurance that it is checked by independent charitable experts.





Serving up good with Restaurant Brands

Restaurant Brands Ltd (the NZ franchisee for Carl's Jr., KFC, Pizza Hut, and Taco Bell) has held a Gift Account with The Gift Trust since 2019. Their giving journey with us began with a strategy workshop at their Auckland office, facilitated by our team, which helped them focus their giving to support causes that address barriers to accessing quality education in New Zealand. We then conducted research into that area and found three charitable organisations who punch well above their weight in doing that work: First Foundation, Birthright, and Manaiakalani Education Trust.

First Foundation

First Foundation helps academically talented students to achieve their potential and positively influence their communities. They provide tertiary scholarships and personal mentoring to their students, many of whom come from lower decile schools and may be the first in their families to go to tertiary study. They believe in the potential of a 'hand-up' to make a difference to each student and to help them to make an impact on their society. Each scholarship changes a life, and First Foundation's scholarships have changed the lives of 816 students so far.

Birthright

Birthright is the only New Zealand charity specialising in supporting families led by one parent. For more than six decades, they've worked to strengthen and enrich the lives of children growing up in one-parent families. They help families with clothing and household items, financial assistance for school and holiday camps, social work support and counselling for children, parent education programmes, budgeting advice, parent networking opportunities, and self-esteem programmes for children.



Manaiakalani Education Trust

Manaiakalani Education Trust works with Māori, Pasifika and low-income communities to address educational inequity in 120 schools across the motu. They work closely with teachers and students in each school, inspiring disadvantaged learners to achieve more through improvements to teacher practice. Manaiakalani also supports digital education by helping parents to buy a personal digital device for their child and providing wireless internet access at home and school, allowing them better access to their learning.

A business giving back

With the Restaurant Brands Charitable Fund now in its third year of operation, Chief Brand and Marketing Officer Geraldine Oldham says it's an important way for the business to give back to its community. "As a large employer of young people, supporting young people's access to education is a cause close to our hearts. The Restaurant Brands Charitable Fund is committed to supporting New Zealand charities that focus their activities on that cause." The Gift Trust is proud to have powered Restaurant Brands' charitable giving for the past three years, and we're looking towards a bright future with them.

You can make good happen with The Gift Trust.

The world is home to lots of organisations who are doing amazing things in their communities and environments.

Just as importantly, it's home to people who can enable these heroes to do more good, by providing the money they need.

The real magic happens when these parties connect. That's what we do.

At The Gift Trust our purpose is to simplify generosity, to make good happen. We talk to each donor about your values and dreams for the world, identify the most effective organisations and then monitor progress, to ensure your gift truly is making good happen. We connect your giving with those organisations who are making the biggest difference on the ground, in the areas you care most about. It's personalised giving made easy, so that you can give with greater confidence and deeper effect.

If you're an individual, family or business with \$5,000 to over \$1m to give, and want to make sure it goes into the hands that will use it best, talk to us today.

Get in touch to find out more:

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Together, we'll make good happen.



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