



RUA & CLARRIE STEVENS CHARITABLE TRUST (EST 1970)

'The greater part in us will never die'

NGA MAHI RANGATIRA O TE TANGATA, KAHORE I PAHEMO

NEWSLETTER NOVEMBER 2007

MESSAGE FROM THE TRUSTEES & ADVISORY TRUSTEES

(Written by Lee Stevens)

“I have found that among its other benefits, giving liberates the soul of the giver.” *May A. Angelou*

Philanthropy has certainly gone through major changes since this memorial trust was established in 1970. It has become more noticeable how, on a daily basis, philanthropists are enriching and strengthening communities throughout Aotearoa, New Zealand.

My father Clarrie and I initially set up this trust up to commemorate the life of my mother Rua, following her death from Leukaemia. When Clarrie died (25 years to the day of Rua's death), a decision was made to commemorate them both through the work of this memorial trust.

At the time Clarrie and I set it up there was no organisation in place such as Philanthropy New Zealand to advise and nurture us. New Zealand's great icon in philanthropy Sir Roy McKenzie (who sadly died in September 2007) was known more for the McKenzie stores than his exceptionally generous heart. There were few private philanthropic trusts around, and access to them seemed to be so distant. At the age of 22 I hardly had a clue what philanthropy was all about but I embarked on a steep learning curve and 37 years later I am still learning.

Contrast that to the current vibrancy and huge positive cash flow impact on communities, and community organisations, which simply would not be able to operate at their current levels were it not for the diverse trusts that are in existence today.

“The effect of the 1984 (New Zealand economic) reforms has meant that over the past two decades there has been a decrease on the state providing and more around the autonomy of community services. New Zealand's Community Trusts were a huge and unique resource; they are becoming bigger and bigger players.” Quote: Jennifer Gill – National Business Review, 30th March 2007.

The 1980s saw the emergence of new classes of Trusts called Community Trusts, Energy Trusts and Gaming Trusts, which collectively, in 2005-06 distributed \$500 million to Non-Government Organisations (NGOs). Family or individual trusts in the same period distributed \$116 million.

The recipients of these funds, community-based NGOs, have also significantly changed since our trust was established. Today



Clarrie and Rua Stevens

many of these NGOs are increasingly dependent on these trusts to operate and carry out programmes.

Even though they may have enormous credibility within their own local communities, many of these organisations have huge challenges in capacity building and/or establishing credibility in the eyes of these funders.

Our Trust is increasingly focusing our work with our Tangata Whenua partners, Pacific Island communities and ethnic communities to improve the wellbeing of their communities. So many solutions to our deep-rooted problems lie in collaboratively working together and having a genuine empathy with the cultural differences that are so much part of the Aotearoa of today.

There are many issues facing sectors of our communities – all of them widely canvassed – yet in spite of this there is an amazing revitalisation of spirit occurring in so many communities being driven by NGOs that are working alongside their people, fully encompassing once again the philosophy of “service” over self.

What is so exciting and encouraging is these grass/flag roots NGOs are addressing issues in some very major proactive, innovative and successful ways. These are the future pathways to managing the many and significant challenges facing communities throughout Aotearoa.

In our personal experience we need only look at the exceptional work and extraordinarily successful outcomes our grantees continue to achieve. Such positive and significant assistance, supporting so many damaged families/whanau and individuals to turn their lives around.

The personal stories coming through are just one representation of the impact these organisations, which are deeply rooted within their communities, are having - the individuals who serve with such passion, integrity and commitment. It is these very communities themselves that will solve their own problems, if they are supported and funded adequately.

Both Penny and I are very grass roots focused in our grant making. Each time we meet with our grantees we come away uplifted, inspired and so positive about where communities in Aotearoa are heading.

By establishing closer, more reciprocal relationships with our grantees, we are often aware of how some of their significant needs do not fit neatly into other grant-making models and guidelines. Increasingly, we encourage our grantees to utilise our funding, where possible, in areas where they find it difficult to otherwise source funding. Some funders may well say that we are taking 'risks'. We say; "We are backing communities to try something new, or to do what THEY believe they need to do, and to us that is not a risk – it is an adventure."

As our own modestly sized trust looks ahead, we see our role increasingly as partnering up with small NGOs that have a spirit of independence and fresh thinking about how they go about their work.

While we are immensely excited by some new funding partnerships we're developing, equally we are just as excited by the longstanding funding partnerships that have stood the test of time and have developed a proven record of delivering very successful outcomes.

Both Penny and I wish to thank our many friends in Philanthropy New Zealand who are so encouraging and inspiring to us both. Their encouragement and pearls of wisdom continually challenge us to expand our grant-making horizons.

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PHILANTHROPY NEW ZEALAND

(From Philanthropy Bulletin April 2007).

Philanthropy New Zealand's 2007 Philanthropy Matters Conference has been ranked among the best by delegates and speakers who spent March 27/28 in Wellington exploring why, how and when philanthropy matters.

Over 300 people attended the conference and benefited from the wisdom and experience of some of the world's foremost philanthropic thinkers and other sector leaders from New Zealand and overseas. As promised, they tackled the pertinent questions facing our sector from their perspectives. A number of interactive workshops also passed on practical ideas and innovative working practices.

This was the first time Philanthropy New Zealand and the Community Trusts of New Zealand combined their conferences.

Philanthropy New Zealand's Chairperson Jennifer Gill says; "New Zealand is well placed to respond to the hopes, dreams and aspirations our communities." Judging on the general conference discourse we can be assured this is the case.

STATISTICS NZ LAUNCHES NON-PROFIT DATA

Statistics New Zealand has launched Counting Non-Profit Institutions (NPIs).

The number of NPIs identified was 97,000, with the largest number of organisations in the following categories:

- Culture, sports and recreation 40,840 (44.6%)
- Social services 11,280 (11.6%)
- Religion 9,890 (10.2%)
- Development and housing 7,580 (7.8%)
- Business and professional associations, unions 3,130 (3.2%)



TRUST'S PHILOSOPHY

The Trustees have recognised that with a modestly sized Trust such as ours, to remain effective we need to pull back in some areas and consolidate the Trust's core passions. The Trustees continue to regard the concept of providing ongoing funding (subject to funding availability) as an integral part of the Trust's ethos.

The Rua and Clarrie Stevens Trust's 'boutique' ethos of its family of beneficiaries was first introduced at its Silver Jubilee Celebration dinner in November 1995. We began with a family of six organisations. This 'Special Family of Grantees,' today comprises 15 organisations that each, in their own way, contribute to the 'special characteristics', of our vibrant NGO sector.

Total cash distributions to these 15 organisations to date exceed \$379,600. In 2006/07, the "Special Grantees", received 88 % of the Trust's distributions, with 80% of the Trust's distributions to seven organisations. The Trust has now funded many of those programmes for a number of years.

Funding was allocated towards the following:

- 45% of the total funding was allocated to operational costs
 - 27% of the total funding was allocated to programmes.
 - 22% of the total funding was allocated to scholarships.
 - 6% of the total funding was allocated to a capital, church-based project.
- = 100%



DONATIONS FUNCTION

On a typically mild Auckland Saturday evening, 17th February 2007, members of the Trust's 'Special Grantees,' came together with family guests at our home in St Heliers, Auckland, to enjoy great fellowship, hospitality, and music from musicians of the Auckland Philharmonia Orchestra.

Next year, 2008, marks an auspicious time in a certain person's life, (Lee), who reaches that "magic, tender" age of, dare we admit it... 60!!WHEW!!!!!!!

So we have decided not to hold our annual "Donations Function" in February. Instead we will hold a combined 60th birthday bash and annual function on July 26th 2008. We hope to share this special birthday party (with music of 'our era') with invited representatives of our "Family of Grantees" and our friends and family.



ALEX BURT

Since his appointment as Trustee in 1994, Alex's contribution to the Trust has been outstanding, in building a dynamic growing investment base, principally Australian-based. The Trust's ability to fund its distributions to its family of grantees is totally due to Alex's expertise as an Australian-based investment senior executive, member of the Australian Stock Exchange and Chief Executive Officer with a leading edge investment company.



Mr Alex Burt

Alex has spent over 40 years, Sydney-based, in the investment sector.

"What a rollercoaster of a year it has been for the investment industry! Fortunately our investments for the Trust are mostly growth stocks and the dividends really have not been affected. Again, I would like to congratulate Lee & Penny on another great year for the Trust, with so many worthy beneficiaries.

"I look forward to many more years working with Lee & Penny, together with the Advisory Trustees, and the continued success for the Trust," says Alex.

TRUST APPOINTMENT

The Trustees are delighted to welcome a new Advisory Trustee Mr Darren Priday.

Darren's great-grandmother Hazel, was Rua's sister. Darren spent much of his early life moving around New Zealand, but spent some time in Auckland where he had the opportunity to get to know Lee & Clarrie.

Darren worked for a boutique management consultancy in Canberra before returning to Auckland in 2001 where he worked with the accounting firm Ernst & Young and then Vodafone. Darren has recently started his own management consultancy, Precise Consulting Limited.

Darren and his wife Victoria celebrate their 10th wedding anniversary this year and have two little girls, Emily (3) and Bethany (1).

Darren joins the current Advisory Trustees, Greg Fleming and Iftikhar Ahmad. The Trust is greatly indebted to the enthusiasm, energy and commitment of these Advisory Trustees.



L to R: Darren & Victoria Priday, Greg & Kirsty Fleming, Marhazbin & Iftikhar Ahmad, Lee & Penny

FINANCIAL UPDATE FOR YEAR ENDED 31ST MARCH 2007

Following on from a stellar 2005/06 financial year (with an investment return in excess of 20%) and boosted by the receipt of significant special dividends, this year's core investment income was 10% higher than the previous years.

Total investment returns were 13.85%.

These results are due to the investment philosophy of our co-Trustee Alex Burt. They represent a long-term investment strategy based on Alex's successful accumulated experiences of over 40 years' working in investment markets.

These investments are principally invested in blue chip Australian publicly listed companies, where the economy is more resilient. The Trust has no exposure to New Zealand based finance companies.

The Trustees maintain a conservative approach to grant making as they are acutely aware the Trust's income is totally dependent on the equity markets, which rise and fall from time to time depending on the various market conditions.

Our major focus to our grant making, from a financial perspective, is to maintain "sustainability," in grant distributions. We also intend to progressively increase the level of our grants to an average of \$5,000.

Distribution Policy

The average grant this year was \$1,990. The Trust's benchmark average grant distribution is \$5,000. Currently three organisations receive this amount (up from one last year), and progressively over the next two or three years grants will progressively increase to this benchmark figure.

Distributions

Cash distributions made this year to 24 organisations total \$49,760, an increase of 15.3% over last year's \$43,138. The average grant is \$1,990.

Grants made to the Trust's 'Family of Grantees' (ongoing grants), increased by \$12,810. These Family of Grantees grants represent 88% of the year's total grants.

These on-going grants total \$43,880, out of total grants paid of \$49,760. The balance of the grant distributions are one-off's, representing 12% of total grants.

The Trust's distribution priorities over the next three years, leading up to the Trust's 40th anniversary are focused on:

- Increasing the two Memorial Scholarships (Rua & Clarrie) to \$5,000 per scholarship per annum.
- Grow the Trust's Discretionary Fund established this year.
- Increase the level of funding to the Family of Grantees.

In the year, funds were allocated to the following sectors:

Organisations	31.03.06	Percentage	31.03.07	Percentage	Benchmark
Art/Cultural	\$12,000.00	28%	\$12,200.00	24%	20%
Community	\$ 4,893.00	11%	\$ 6,300.00	13%	15%
Education	\$13,725.00	32%	\$12,680.00	25%	30%
Environment	\$ 3,400.00	8%	\$ 4,000.00	8%	10%
Faith Giving	\$ 3,420.00	8%	\$ 6,480.00	13%	10%
Youth	\$ 5,700.00	13%	\$ 8,100.00	17%	15%
Total	\$43,138.00	100%	\$49,760.00	100%	100%

Distributions since the Trust's inception in 1970 now exceed \$840,000.

THE ARTS

Proudly supporting the Arts for the past 36 years

Cash distributions totalling \$12,200, representing 24% of total grants, were distributed amongst four organisations.

Auckland Philharmonia Orchestra **Chief Executive: Ms Barbara Glaser** **Grant Allocation: \$5,000**



Penny, Iftikhar, violinist Mark Bennett, Lee

The Trust sponsors one musician as part of the annual Chair Sponsorship Scheme. This year our sponsorship continued with violinist Mark Bennett, who we have sponsored since 2002.

Mark was born in Takapuna and raised on the North Shore. He comes from a line of many generations of violinists. His undergraduate study was at Auckland University with David Nalden. He then won a full scholarship for Post Graduate study for three years at the Royal Academy of Music in London.

In London he studied with the leader of the Aolian String Quartet, Emmanuel Hurwitz. He spent eight years in London working as a freelancer with many of the famous London Orchestras including the Royal Philharmonic and the BBC Symphony. He also toured extensively through Europe with these orchestras.

Mark won a first violin position with the Auckland Philharmonia Orchestra when he returned to New Zealand. He has served as Chairperson of the Auckland Philharmonia Orchestra Society and he has also served on the Board of Directors. He also operates a busy violin teaching practice instructing mainly advanced students.

Our sponsorship with the Auckland Philharmonia Orchestra began in 2000. One of the outcomes of this sponsorship is ensuring professional standards in marketing, promotions, publicity and contributing to a comparable living wage for the musicians.

The Auckland Philharmonia Orchestra has developed a reputation for innovative programmes and wide-ranging activities. It presents more than 60 of its own concerts each year ranging from classical to pop to baby proms in addition to major engagements with visiting solo artists, outdoor and public concerts, and special events. Its extensive education programme, commitment to musical programmes for all ages, and promotion of New Zealand music and musicians, has secured the orchestra a large following and an enthusiastic audience.

During the year under review the Trust also sponsored, for the first time, an Orchestral Summer School scholarship. Violinist Mathew Jordan was the inaugural recipient. He is the eldest of several children from Tauranga. Mathew has taken advantage of many of the APO education opportunities including playing as Deputy Concertmaster in the National Schools Orchestra. This year he took up the conducting option at the APO Lion Foundation Orchestral Summer School.



Violinist, Matthew Jordan

Beneficial Outcomes of Grant:

- Improves professionalism.
- Enables APO to pay musicians a competitive salary.
- Provides a valuable service to the people of Auckland, of whom 400,000 attend Auckland Philharmonia Orchestra concerts annually.

Grants distributed to Auckland Philharmonia since 2000 total \$26,975.

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Royal New Zealand Ballet **General Manager: Ms Amanda Skoog** **Grant Allocation: \$6,000**

Project Funded: Annual 'Partner a Dancer' scheme. Alessia Lugoboni, our sponsored dancer was born in Verona, Italy. Alessia studied briefly at the New Zealand School of Dance in 2001 on a scholarship. Between 2002 and 2003 she trained at the English National Ballet School. On graduation Alessia joined the cast of Das Phantom der Oper in Stuttgart. The 19 year old, who speaks Italian, English, German and French, joined the company in 2004. Our Trust has sponsored her since then.

Recent performance highlights include Si Supieras, Milagros a blood-thirsty vampire in Dracula, the sweet but feisty, delightfully charming Clara in the Nutcracker, and a Bridesmaid in The Wedding.



Alessia Lugoboni & Abigail Boyle in Cinderella

Beneficial Outcomes of the Grant

Partner a Dancer support enables the company to provide beyond dance career opportunities and extramural opportunities such as media training, which is beneficial to both the company and the individual dancer. This programme raises the morale of both the dancers and the dance company as a whole.

Alessia’s reflections:

“It’s been three years since I joined the Royal New Zealand Ballet, three years of great experiences, opportunities and happiness. It has been wonderful to be able to turn my passion into a job and to keep following the dream I’ve had since I was a child.

“From the first day that I met Lee and Penny, they’ve been great supporters and friends. You are like part of my family.

It’s always a pleasure coming to Auckland and I look forward to spending time with you and having another great time together. When I’m dancing it’s beautiful to know that you’re both sitting in the audience watching the show – and believe me, I dance just for you.

“They’ve helped me a lot during my time in New Zealand and I’ll never stop thanking them for this.”

Grants distributed to the Royal New Zealand Ballet since 1971 total \$118,075.



Tower NZ Youth Choir

Artistic Director: Dr Karen Grylls

Grant Allocation: \$1,000.00

Project Funded: Two scholarships to enable two outstanding young singers to realise their potential. The scholarships cover the cost of additional tuition to improve their musicianship or vocal skills.

Rua and Clarrie Stevens Charitable Trust scholarship recipients:

Brooke Baker – Soprano

Brooke is from Hamilton and was auditioned into the choir in December 2004 for the 2005-2007 cycle. She is a section leader. In the past year she has set up two businesses focusing on photography and design and become fully self-employed.

The Scholarship is helping her learn more about her voice, and have a firmer understanding of vocal technique. This support has allowed her to pursue her singing when it would otherwise be difficult to afford. Brooke is very grateful for the support of the Trust.

Simon Kersten – Bass

Simon is from Palmerston North, but is currently studying civil engineering at Canterbury University. He has been a Youth Choir member since August last year and “has enjoyed every minute”. He joined the choir directly from the NZ Secondary Students’ Choir, and was thrilled to hear he was a recipient of the Rua and Clarrie Stevens Charitable Trust Scholarship. This scholarship has enabled him to fund singing lessons which he would otherwise not have been able to do. He is currently taking three choral groups at College House Hall of Residence in Christchurch, and students in these ensembles can also benefit from the skills he is learning.



Brooke Baker and Simon Kersten

Both of these scholarship recipients are members of the TOWER New Zealand Youth Choir touring to Canada, the United Kingdom and Spain in June/July this year, representing NZ on the international stage at choral festivals and competitions.

Beneficial Outcomes of the Grant

The whole choir benefits from an increased level of musicianship & vocal skills, resulting in improved performance. They are able to ensure that they have the financial resources to meet their goals in respect of equal opportunity.

Grants paid to Tower NZ Youth Choir since 2002 total \$2,400.

Miscellaneous Grants

Auckland Festival \$200.00



COMMUNITY

Cash distributions totalling \$6,300, representing 13% of total grants, were distributed to eight organisations.

Somali Community

Community Leader: Mahad Warsame

Grant Allocation: \$3,500

Project Funded: Road Safety project for Women.

The aim of the project is to help members of the Somali community gain driving licences. Increased awareness around safety of children in the car e.g. using car seats, the wearing of seatbelts etc.

This programme will contribute immensely to reducing isolation of the women, enabling independence i.e. being able to drive to the doctors/shopping etc. Increasing self-esteem and confidence. Better employment prospects with a driver's licence.

Each of the 33 women who participated in the programme took approximately nine lessons. Planning for the next three years means this project will continue to help Somali woman integrate and participate in New Zealand Society.

Beneficial Outcomes of the Grant

The programme contributes to road safety and also mental well-being of women, reducing isolation.

Enables greater outreach to Somali women.

Reduces number of traffic infringements for Somali women/mothers driving without licences.

Grants distributed to the Somali Community since 2004 total \$7,500.



Mahad Warsame with Fardowse Abi

Miscellaneous Grants

As a new initiative this year, Penny was allocated some funds to distribute in areas of her personal interest. The Advisory Trustees were also allocated some funding.

The grants listed below include their personal allocations.

Project Awhi:	\$750
Prison Fellowship:	\$250
Papatoetoe Cricket Club:	\$500
Papatoetoe High School:	\$500
B.P.W.-Tsunami Appeal:	\$200
Asia Pacific Mediation Conference:	\$200
Philanthropy New Zealand:	\$400
TOTAL:	\$2,800

EDUCATION SECTOR

Cash distributions totalling \$12,680, representing 25% of total grants, were distributed to five organisations in this sector.

Two of these are scholarships in the memory of both Rua and Clarrie Stevens.

Glendowie College

Principal: Ms Louise Moore

Grant Allocation: \$3,000

Annual funding of \$3,000 to further develop the work of the Performing Arts areas, enabling students to excel in Drama and Music.

The 40 members of the College Concert Band went to Brisbane on 6th June to participate in the Southern Cross Music Festival with Concert Bands from New Zealand, Australia and Singapore. This year's Concert Band has been joined by a number of upcoming, young, skilful musicians.

Beneficial Outcomes of the Grant

Setting up an intermediate Concert Band from year 9 and 10 (beginning players) and assistance with performance music facilities.

Assistance with drama performance and student training.

Grants distributed to Glendowie College since 1994 total \$52,845.



The 'Arts Team' from Glendowie College

Maxim Institute
Managing Director Founder: Greg Fleming
Grant Allocation: \$3,500

Maxim Institute is an independent research and public policy think tank. Their mission is to foster the ideas and leaders that will enable freedom, justice and compassion to flourish in New Zealand.

Project funded: Sponsoring one internship.

To assist the running of a summer internship programme for between 6-10 University aged young people with demonstrated intellectual and leadership abilities.

Brooke Dobson (21) began the Maxim Institute summer internship 2006/2007 within one week of completing her tertiary studies at Victoria University. She made the move to Auckland to begin her career in broadcast journalism after graduating with a BA, majoring in International Relations, Political Science and Media Studies. Brooke was a New Zealand representative at the Global Young Leaders' Conference held in the USA in 2003. She worked in the TV3 newsroom to gain experience while studying in Wellington.

Brooke's aspirations for the internship were to build a solid foundation in her character, values and work ethics and to develop a greater understanding of the issues facing New Zealand within the media sphere. Throughout her time on the programme she engaged in the daily life of the organisation and was mentored by Maxim Institute's Communications Manager Amanda McGrail. She accomplished individual project work, research assignments and engaged with the numerous MPs and community leaders invited to speak with the summer interns.

Brooke noted her experiences on the internship at Maxim Institute were immeasurable in helping shape her path for her future: "This summer has been life-changing for me. I have built a valuable foundation and developed the skills that will see me achieve my goals. The people at Maxim have a passion for investing their time and talents into nurturing our nation's aspiring leaders. This internship, along with Maxim's wisdom and support, has profoundly impacted me at this prime stage of my career," she said.

Brooke looks forward to entering the broadcast journalism industry, specifically the television news field, where she hopes her passion for people and connection will positively enrich our nation's outlook.

Beneficial outcomes of the Grant

The student is trained as a potential young leader in our country. The quality and passion of their current and past interns, and the leadership position they attain, will establish Maxim Institute's internship programme as a reputable and desirable leadership training facility.

Grants distributed to the Maxim Institute since 2002 total \$10,000



Brooke Dobson

Clarrie Stevens Memorial Law Scholarship
Grant Allocation: \$3,500

Established in memory of Clarrie Stevens, the Clarrie Stevens Memorial Law Scholarship is awarded to assist meritorious senior law students complete their course at the University of Otago.



Mr Clarrie Stevens

The Scholarship is awarded in the final year of study for the degree of Bachelor of Law or Bachelor of Law with Honours. Preference is given to candidates who have demonstrated special ability in the areas of Will & Trusts or Commercial Law, as these were areas of special interest and expertise to Clarrie Stevens.

Financial need as well as academic ability will be taken into account in awarding the scholarship. Clarrie's life was dominated by his love and passion of the law. He graduated LLB(NZ) in 1931 and LLM(NZ) with first class honours in 1934. Clarrie held a very strong belief that the law profession had a duty to donate its services to those disadvantaged in our society. He freely donated his services to numerous individuals, including members of the clergy, who could not otherwise afford to hire a lawyer.

This was long before the concept of legal aid came into being. He was also honorary solicitor to a number of Dunedin-based charities.

The Scholarship is awarded by a Dunedin-based Scholarship Committee which includes two Dunedin lawyers, Mr Geoff Thomas, partner of Anderson, Lloyd, Caudwell and Roger Macassey, partner of Gallaway, Cook, Allan. Mr John Smillie, Professor of Law at Otago University, is also on the committee. The Trustees express their appreciation for the valued input from this Committee. The Scholarship started in 1998, following Clarrie's death in 1995, 25 years to the day of his late wife's death.

This year's successful recipient was Jamin Emmanuel Tomlinson. Jamin is completing his LLB(Hons). He comes from a one-income family and is one of six children. His university fees have always been paid through a student loan and he has worked part time for several years in order to provide income for his weekly expenses. Additionally, he has also assisted his brothers, sisters and parents with financial help where he can. He has also donated part of his wages to CCF for several years. This year he faces borrowing to fund his study, as he is no longer eligible for financial assistance.

Clarrie himself came from a low-income family background. His father died when he was very young, both he and his brother worked fulltime to put themselves through law, and at the same time they personally funded their two sisters to attend private schools.

Next year this scholarship marks its 10th anniversary and the Trustees will be increasing it to \$5,000 pa coinciding with that anniversary. The Trustees have also agreed to further mark this anniversary with a Capital gift of \$5,000 to the Dunedin Community Law Centre. The income generated from this fund will be used to award an annual prize to the law student who has contributed in a practical and ongoing way to the work of the Law Centre.

The Law Centre provides general legal information, running legal educational talks for community groups, and providing specific advice and representation for individuals. Through these processes, they are contacted by close to 8,000 people a year. Each year they have 120 law student volunteers rostered onto their advice shifts, education programme, and prison advice roster.

It is proposed to name this award after Clarrie's legal secretary for over 40 years, Joan Bethia Chadwick.

When Joan died in 2000 she bequeathed a generous legacy to the Trust. She was an outstanding support for many years to both Clarrie and myself following Rua's death in 1970. She was a deeply loved member of our extended family. The Trust also proposes to host an anniversary dinner next year in Dunedin.

Grants distributed through the Clarrie Stevens Memorial Law Scholarship since 1998 total \$29,000 awarded to 11 Law Students.



L-R: John Smillie - Professor of Law, Otago University. Roger Macassey, Partner of Gallaway, Cook, Allan. Recipient Jamin Emmanuel Tomlinson. Geoff Thomas, partner of Anderson, Lloyd, Caudwell.

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New Horizons for Women Trust (Inc.)

Chair: Ellen McCrae.

Grant Allocation: \$2,600

New Horizons for Women Trust has been providing grants to women to develop their potential in the fields of education and employment since 1991. It specifically assists women into second chance education and training opportunities where individual circumstances require special support.

The Trust also funds individual or group research projects, under directed supervision in statutory institutions, or the community, on issues relating to women and families and where the research will benefit the wider communities. These grants are open to all women in New Zealand and are not restricted to a geographical area.

The New Horizons for Women Trust's achievements:

- In 2006, 22 awards were made, with a total value of over \$67,300.
- An increase in the number of second chance education awards given.
- A 25% increase in the value of seven of the second chance awards given.
- Continuing support from loyal sponsors of the Rua and Clarrie Stevens Charitable Trust and John Illott Charitable Trust into their 10th year of giving.
- The awarding of the Dame Silvia Cartwright Second Chance Award.
- Their first bequest.

Project Funded: Second Chance Training Award
Our grant is by way of a memorial to Rua, with funding allocated to a Second Chance Training Award. Preference is given to an applicant in early childhood education, matching the interest of Rua who, in her early years, was a kindergarten teacher.

This year's recipient was Talimalama Larsen, from Auckland. Talimalama is a mother of five children whose husband has health issues, which affect his employment. She is in her final year of a Diploma of Teaching, Early Childhood Education, (Pacific Islands Programme), at the University of Auckland. Talimalama is looking forward to working in a full time position to benefit her family. Juggling family, tertiary education, community (she runs an after-school programme, coaches athletics) she is an excellent recipient of this award.

The Trustees have increased the grant to this Trust this year. We will progressively increase the annual grant for this scholarship to \$5,000 by our 40th anniversary in 2010.

Beneficial Outcomes of the Grant

The second chance award makes a real difference to the lives of women, their families, and communities. The award offers empowerment for an individual in a disadvantaged situation, thereby making a real difference to their lives and, subsequently, others.

The recipient becomes confident, has a real sense of achievement, and recognition that someone believes and values them and their contribution to our community. They realise that they can and will make a difference. This is evident in seeing the direction and success of previous recipients of New Horizon Awards.



Recipient: Talimalama Larsen.

Grants distributed to the New Horizons for Women Trust since 1998 total \$16,900.

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Miscellaneous Grants

YWCA: Grant Allocation \$80.00

Donation to future leaders programme.

ENVIRONMENT

Total distributions amounted to \$4,000, representing 8% of total grants, and were distributed to one organisation.

The Entrust Foundation
Chairman: Mr Richard Morley- Hall.
Grant Allocation: \$4,000

Entrust is a charitable organisation dedicated to researching, developing and promoting sustainable local economic development.

Projects Funded:

Building on a campaign to introduce Container Deposit Legislation (CDL) in New Zealand. This funding will enable Entrust to produce and disseminate information through a website currently under development to run workshops and to meet with key industry stakeholders, politicians and not for profit groups who will benefit (such as community recyclers and the scouts) to enlist their support. Some funding also allocated towards administration costs.

Beneficial Outcomes of the Grant

Increased public awareness of the need for CDL and its benefits. Increased coordination of the various groups wanting CDL to be introduced. Increased political awareness of the benefits of CDL resulting in pressure by government to introduce CDL.

The main beneficial outcome is increased public demand for effective waste minimisation measures that not only protect the environment, but also involve and benefit as many groups as possible within local communities.

Funds distributed to the Entrust Foundation since 2003 total \$12,900.



Penny & Warren Snow at Lake Ngatu, approx 20 km Northwest of Kaitiaia.

FAITH BASED GIVING

Distributions made amounted to \$6,480, representing 13% of total distributions, to four organisations.

Both Rua & Clarrie had strong Christian values. Rua was a regular church attendee whilst Clarrie often quoted texts from the bible and lived those texts in his daily life.

One memorable text he often quoted to me was, "The Lord loves the cheerful giver."

How apt that, in later life, he followed this through and established this memorial trust in loving memory of his beloved wife. Likewise, the Trustees of this memorial trust give very much with a "cheerful heart."

Crystal Cathedral Ministries (NZ)
Founding Pastor: Robert H Schuller
Grant Allocation: \$840

Hour of Power is a one-hour international television programme that emanates from the weekly worship services at the Crystal Cathedral in Garden Grove, California.

In February 2007 Pastor Robert A Schuller, senior Pastor of the Crystal Cathedral and his wife Donna, visited both Christchurch and Auckland. Penny and I had the pleasure of meeting them both.

Hour of Power's worldwide audience (including New Zealand) is estimated to be over 20 million people each week. In New Zealand, where Hour of Power screens twice weekly on TV3, the Ministry responded to almost nine thousand letters and emails including numerous prayer requests!

Funds distributed since 2006 total \$1,560



Lee & Penny meeting Robert & Donna Schuller, on their 2007 NZ tour.

GLEN INNES CATHOLIC CHURCH
Parish Priest: Neil Darragh
Grant Allocation: \$1,200

Our local church, based in Glen Innes is principally of Pacific Island ethnicity. This parish has a tremendous vibrancy, warmth and a great feeling of belonging. Our donation has been allocated as a contribution to the honorarium of a part-time Parish Care Coordinator.

The Care Coordinator acts as a focal point and initiator of the Parish social support network, liaising with other community agencies in the area, and leading the Parish group of volunteer "care" workers. The church has active outreach community programmes.

A financial contribution was also made towards the Parish Jubilee celebration held in 2006, which was a very special occasion which both Penny & I were delighted to attend.

Funds distributed since 2005 total \$1,900



St Pius X Parish Care / St Vincent de Paul group packing food for Christmas parcels.

With the support of a grant from Rua & Clarrie Stevens Trust, the Parish Care Co-ordinator actively co-ordinate the pastoral work of the group, the ever growing emergency needs of people around Glen Innes.

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Te Waipuna Puawai Mercy Oasis
Manager: Ms Puamiria Maaka
Grant Allocation: \$1,440

Te Waipuna Puawai Mercy Oasis is a community development initiative of the Sisters of Mercy Auckland. It serves some of the most vulnerable whanau in Glen Innes and surrounding low-income areas.

It was established in 1999, following a three-year community consultation process that involved local Maori, community agencies and other interested persons.

Project Funded: To introduce a new programme as part of the adult community education that covers grooming and dressing with confidence on a limited budget as well as CV and interview preparation. This will be delivered as a one hour workshop each week over an eight week period, which coincides with the term duration. The funds covered the cost of the consultant to deliver this programme.

Beneficial Outcomes of the Grant

This initiative is all about building the confidence of women who are ready to move to the next step after training, not only into employment but also in their interactions with others. This initiative will assist in the budgeting, teaching the women how to make wise purchases.

Funds distributed since 1994 total \$2,440.00.

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Parish of St John's Church, Roslyn, Dunedin
Grant Allocation: \$3,000.00

A one-off grant towards a link building from the Church to Parish Hall containing lounge, offices, toilets, and a kitchen. It also helps fund re-roofing and painting the church. The building cost of the project has been tendered at \$395,000.

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YOUTH

Total distributions of \$8,100, representing 17% of total distributions, were distributed to two organisations.

Tamaki Pathways Trust
Programme Director: Ms Pene Loza
Grant Allocation: \$8,000

Tamaki Pathways was established in 2000 and accepted its first clients in 2002.

Since its inception, over 160 youth have passed through its individually tailored programmes in the Tamaki area (mostly coming from Glen Innes, Panmure and Mt Wellington). More than 90% of these young people have remained free of offences for the period of up to one year following completion of their individually tailored programme. This is well above the national average for Youth at Risk Trusts. These youth are principally of Maori and Pacific Island ethnicity.

Project Funded:

A key focus for 2007 is to build the Trust's capacity through broadening both its funding base and mix. The Trust will endeavour to do this through the promotion and marketing of the Trust profile.

Funding was allocated towards the costs of a Trust presentation given at the Philanthropy New Zealand conference in Wellington on March 27-28, 2007 and Trust participation at the Community Sector & Government Conference in Wellington held June 21-22, 2007.

The Trust also provided pivotal training for the Administration/Funding Manager to attend the professional FINZ "Principles & Techniques in Fundraising" week long course.



L to R: Atawhai Morgan, Glen Donaghy, Pene Loza and Tai Brown

In addition funding was provided towards the costs of a Youth Summer Programme for the Trust's youth clientele.

Beneficial Outcomes of the Grant

Opportunities for potential funders/supporters to assist in addressing the rising social needs of youth at risk and their family'whanau within the Tamaki region. Strong relationships built with potential new funders sourced through networking.

Funds distributed to the Tamaki Pathways Trust since 2000 total \$36,284.

Miscellaneous Grants

Grant Allocation: Otago Youth Wellness Trust – \$100



RUA & CLARRIE STEVENS
CHARITABLE TRUST
EST 1970

16 FERN GLEN ROAD (NORTH)
ST HELIERS, AUCKLAND, NEW ZEALAND
PHONE 09 575 7856 FAX 09 575 7856 EMAIL leepens@xtra.co.nz

TRUSTEES: MR L.O. STEVENS, MRS P.A. STEVENS, MR A. BURT
ADVISORY TRUSTEES: MR G. FLEMING, MR I. AHMAD, MR D. PRIDAY