



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 2008

MESSAGE FROM THE TRUSTEES & ADVISORY TRUSTEES

(Written by Lee Stevens)

"Most of the important things in the world have been accomplished by people who have kept on trying when there seemed to be no hope at all." *Dale Carnegie*

THE POWER OF A DREAM THRIVES 38 YEARS ON

The journey of our memorial trust has been a most remarkable experience for me and has tremendously enriched the whole being of my life in so many fantastic and positive ways. It began when I was just 22 years of age; I recently celebrated my 60th birthday!

This year also marks quite a milestone by way of grant making. Our total grants since inception are now in excess of \$900,000. This from modest beginnings and what is still a very modestly sized trust.

As our memorial trust builds momentum towards 40th anniversary celebrations in 2010, I have been reflecting on its genesis. It seems quite extraordinary to me that my late father, Clarrie and I actually conceived this Trust based solely on an ideal of love and heartfelt admiration for my late mother, and her outstanding community spirit and love of Ballet and the Arts. At that time neither of us gave much thought to the enormous long-term commitment of time and energy required to build and accrue the financial resources necessary to provide the life blood to this memorial trust.

When Clarrie married Rua Frapwell in 1938 he entered into a partnership that enhanced his life for 32 years. Clarrie himself died 25 years to the day after his beloved wife. The Trust's financial well being and growth over the years has been driven substantially by the wise counsel of my late father. Over many years I have continued to personally donate modest funds to honour the anniversary of my late parents' birthdays and the anniversary of their death. Nothing in life gives me greater pleasure than being able to assist in the growth of the Trust and thus the ongoing financial support of our grantees by this personal giving. I could never otherwise have experienced this quite unique life without the sheer joy and exhilaration of being a part of the development of this Trust for some 38 years.

My personal commitment and that of my wife Penny's and to the Trust and what it represents continue to grow stronger and more passionate than ever. It is so much a part of who we are that we simply could not imagine life without serving our beloved Trust and our 'Family of Beneficiaries.' Having said that we still have this feeling of restlessness about our work and the underlying drive for



Clarrie and Rua Stevens

the Trust to continue to perform on the financial front to deliver and expand its funding partnerships throughout the community.

One of my great memories of Clarrie is how he used to share with me his knowledge of the most wonderful philosophers from the Greeks through to the Romans. (He did philosophy as part of his 1st class honours in Law, LL.M.) He would discuss with me the evolution of civilisations beginning with autocracy, then monarchy through to democracy. How civilisations adjusted throughout history with these political changes until one reached the era of hedonism which led onto decadence and collapse.

Communities would then re-invent themselves. In the end these ancient philosophers came around to the shared view that the greatest enjoyment and personal satisfaction that one derives from life itself is through service to others.

The realisation dawned on us recently just how some of our multi-funding partnerships have evolved into some quite long term wonderful associations. Part of our whole ethos is our enduring loyalty to our Family of Beneficiaries. My parents many positive attributes included their unwavering loyalty and support for their friends and their community interests, together with their strong value systems that epitomised who they were. We think the philosophy behind the Family of Beneficiaries epitomises these values.

Our longest association is with the Royal New Zealand Ballet, which began in 1971, just a year after the Trust was established. They have received over \$125,000 and are a key recipient of our Trust. Rua loved Ballet and the Arts. They gave her tremendous joy and pleasure and it is with that spirit that we have given back to them; about \$320,000 of the total \$900,000 donated has gone to various art organisations. In fact the whole concept of establishing this Trust came from knowing how much enjoyment Rua received through her love for ballet.

Another long-term association is with Sir Edmund Hillary's Himalayan Trust which has received funding from our Trust on and off since 1972.

The Arts and Drama Departments at Auckland's Glendowie College have had a partnership with our Trust since 1993. We've greatly appreciated the enthusiasm and support from the School Principals, firstly David Eddy and latterly Louise Moore, as well as the valued input from Head of Music, Christine Myhre and other staff and students over the years. Grants to this quite outstanding College now total \$55,845 and include the purchase of a grand piano. Because ours is a modestly sized Trust, external input and assistance especially with our Trust functions is greatly valued and appreciated by both Penny and I.

Last year (2007) marked the 10th anniversary of the Memorial Rua Stevens Award which is distributed through New Horizons for Women Trust. The award is part of the New Horizons Trust's Second Chance Education Programme. Our award goes to a recipient studying early childhood education to reflect Rua's job as a kindergarten teacher.

On Friday 9th May this year, we marked the 10th anniversary of the Clarrie Stevens Memorial Law Scholarship. Penny, the advisory Trustees, (Darren Priday, Iftikhar Ahmad) and I flew to Dunedin where we joined an eclectic collection of Dunedin lawyers, law lecturers and family for a celebration dinner. It was hosted by the Otago University Law Faculty Dean, Mark Henaghan, and what a superb host he was! At the dinner we announced the Trust has established an annual award for a law student who makes the greatest voluntary contribution to the Dunedin Law Centre during a year of their study of Law at Otago University. The award is named after Clarrie's late legal secretary, Joan Chadwick, who worked for him so faithfully and loyally as his legal secretary for over 35 years.

TRUST'S PHILOSOPHY

The Trustees have recognised that with a modestly sized Trust such as ours, we need to pull back in some areas and consolidate the Trust's core passions if we are to remain effective. The Trustees continue to regard the concept of providing multi-year funding (subject to funding availability) as an integral part of the Trust's philosophy. The Trustees are presently conducting a review of our multi-year funding partnerships with the intention of bringing about greater flexibility and fine tuning our funding model. In addition, to provide greater funding sustainability, the Trust has confirmed three year funding partnerships with several of our grantees this year. It is also worth noting that the level of our distributions is steadily increasing; five organisations now receive grants of \$5,000 pa or greater.

The Rua and Clarrie Stevens Trust's 'boutique' ethos of its Family of Beneficiaries was first introduced at our Silver Jubilee Celebration dinner in November 1995. We began with a family of six organisations. This Family of Beneficiaries now comprises of 16 core organisations, some of whom have received on-going funding for a number of years, with increases to the amounts they receive. The Beneficiaries do change from time to time as the Trust picks up new multi-year funding partnerships replacing existing ones. These partnerships have become a very important aspect of our lives and we continue to be inspired by the outstanding work of the diverse organisations we support. In addition to this the Trust makes a small number of annual one-off grants.

Total cash distributions to past and current Family of Beneficiaries total \$745,000. They received 61% of this year's distributions. (Last year 88%).

Funding was allocated towards the following:

- 51% of the total funding to operational costs.
 - 16% of the total funding to programmes.
 - 21 % of the total funding to scholarships.
 - 12% of the total funding to a capital, church-based project.
- 100%

ANNUAL TRUSTEES, ADVISORY TRUSTEES FUNCTION.

"In a marked change from the past, the Advisory Trustee organised and hosted this year's function. It was held in March at Dingle Dell, St. Heliers. This beautiful park combined with the fantastic Auckland weather to provide the perfect setting for our informal Trust gathering. It was fantastic to hear from so many of our Trust recipients and to learn more about their exciting plans for 2008. Thanks to everyone who attended or contributed to this important celebration of 2007." *Darren Priday – Advisory Trustee*



ALEX BURT

Since his appointment as Trustee in 1994, Alex's contribution to the Trust has been par excellence, building a dynamic growing investment base, principally Australian-based. The Trust's ability to fund our Family of Beneficiaries is totally due to Alex's expertise. He is an Australian-based investment senior executive, member of the Australian Stock Exchange and Chief Executive Officer with a leading edge investment company. Alex has spent over 40 years, Sydney-based, in the investment sector.

Alex says success in the stock market requires effort, discipline and patience. 90% of success is having the discipline to be consistent.

"Undoubtedly we have experienced extraordinary times; however I have always believed that we should take responsibility for our own investment decisions and not expect to be bailed out of poor investments.

Unfortunately we have adopted a culture of people wanting high returns from investing in high risk financially engineered assets, but wanting to be bailed out by governments or regulators if they lose their money. This has resulted in the reshaping of the US Financial markets. The US needs to ensure that markets begin to function normally by restoring the integrity of the financial system. We will continue to see extraordinary volatility over the coming months as financial institutions restructure and recapitalise their balance sheets, enabling market participants to return to fundamental analysis to make investment decisions," Alex says.



Mr Alex Burt



ADVISORY TRUSTEE:

We are especially appreciative of the on-going input, energy enthusiasm and professionalism from our Advisory Trustee, Darren Friday. Darren established and continued to manage the Trust's website over the past year. (www.rcstevens.org.nz) Darren has been allocated an annual fund to distribute to organizations personally chosen by himself.

FINANCIAL UPDATE FOR YEAR ENDED 31ST MARCH 2008

This past year has been quite exceptional in financial terms. The volatility in equity markets negatively impacted on the Trust's equity portfolio, which showed a reduction in value of 5.94%. This was offset by very strong overall income, up on last year by 210%, which includes one-off gains from realisation of equities. The Trustees do not regard this fall in value of the Trust's investment portfolio as permanent but rather it reflects the current market environment, which in due course should recover. The year by year investment income increased by 2%, compared with the previous year's 10% income which included one-off special dividend payments. The Trust has cash funds on hand for re-investment in due course, which will add to the Trust's financial strength and investment income over time.

These positive 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 Australia's investment markets.

These investments are principally 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 are progressively increasing the level of our grants to an average grant distribution of at least \$5,000 pa.

Distribution Policy

The average grant this year was \$3,095 (last year \$1,990) The Trust's benchmark average grant distribution is \$5,000. Currently five organisations receive this amount or greater (up from three last year) and grants will be increased progressively to this benchmark.

Distributions

Cash distributions totalling \$61,903 were made to 20 organisations. This is an increase of 24% or \$12,143 over last year's grants which totalled \$49,760. Grants to the Trust's Family of Beneficiaries (ongoing grants) totalled \$37,760 this year, an increase of \$4,533. These grants represent 61%, (last year 88%); of the Trust's total grants. The remaining 39% are one-off grants.

The Trust's priority is to increase its overall level of grants. Once this is achieved it will free up future grants to be made elsewhere.

The Trust's distribution priorities over the next two years, leading up to the Trust's 40th Anniversary is focused on:

- a) Increasing the two Memorial Scholarships (Rua & Clarrie) to \$5,000 per scholarship per annum. The Law Scholarship reached that target in 2008.

- b) Growing the Trust's discretionary fund, particularly the Advisory Trustees annual grant allocation, to \$5,000, currently \$3,000.
- c) Increasing the average level of grants to at least \$5,000 pa over time.

Funds were allocated to the following sectors:

Organisations	31.03.07	Percentage	31.03.08	Percentage	Benchmark
Art/Cultural	\$12,200.00	24%	\$13,700.00	22%	20%
Community	\$ 6,300.00	13%	\$ 8,000.00	13%	15%
Education	\$12,680.00	25%	\$14,500.00	24%	30%
Environment	\$ 4,000.00	8%	\$ 7,000.00	11%	10%
Faith Giving	\$ 6,480.00	13%	\$13,050.00	21%	10%
Youth	\$ 8,100.00	17%	\$ 5,653.00	9%	15%
Total	\$49,760.00	100%	\$61,903.00	100%	100%

Distributions since the Trust's inception in 1970 now exceed \$902,000.

THE ARTS

Proudly supporting the Arts for the past 37 years

Distributions totalling \$13,700, representing 22% of total grants, were made to four organisations. An increase of 14% over last year.

Auckland Philharmonia Orchestra Chief Executive: Ms Barbara Glaser Grant Allocation: \$5,600

The Trust sponsors one musician as part of the annual Chair Donor Programme. The Trust is progressively increasing this sponsorship to \$6,000. This year we continued to sponsor violinist Mark Bennett, who we have sponsored since 2002.

We enormously enjoy the personal rapport with Mark. He shares with us the sheer brilliance and skill of classical music.

Mark was born in Takapuna and raised on the North Shore. He comes from a long line of violinists. His undergraduate study was at Auckland University with David Nalden. He then won a full scholarship for Post Graduate study 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 working there as a freelancer with many of the famous London Orchestras including



Violinist Mark Bennett and family with Lee Stevens

the Royal Philharmonic and the BBC Symphony. He also toured extensively throughout Europe with these orchestras.

Mark won a first violin position with the Auckland Philharmonia Orchestra (APO) when he returned to New Zealand. He has served on the APO Board of Directors including time as Chairperson. He also runs a busy violin teaching practice instructing mainly advanced students.

Mark was a northern region mentor for the inaugural AIMS JAM Intermediate School festival in 2007. He visited two schools and prepared their orchestras for the festival, and then at the sharing day he conducted the massed orchestras for the whole northern region.

He is married to Cathy; they have two children, Mathew and Lauren. His current interests outside music include biking (fast he tell us) and gardening. 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 APO is Auckland's only fulltime, professional symphony orchestra. It performs to over 250,000 New Zealanders annually. Throughout its history, the APO has developed a reputation for innovation and creativity through its presentation of wide ranging activities. Their annual calendar includes over 40 different classical concert programmes, featuring international soloists, a pops series, opera in concert, family and outdoor concerts plus much more.

During the year under review the Trust also sponsored, for the second time, two Orchestral Summer School Scholarships to the value of \$600. This helps fund two young musicians to attend the 2008 Orchestral Summer School.

This event is special for these young musicians as it is the only holiday programme of its kind in Australasia and the only opportunity for applicants to be part of an orchestra with professional musicians. The Summer School consists of one week intensive in house training of these young musicians by members of the APO. The School concludes with a public concert held at St. Cuthbert's College. Penny and I have attended the last two concerts. On a personal note, the gem for me during this year's concert was Tchaikovsky- Symphony No 5. This ageless melody just resonates with one's soul, it was magnificent.

This year's two recipients were:

Violinist Katie Taylor, 13 years old. She also plays the cornet to a very high standard and is currently playing in the Invercargill Symphonia. Katie was also the leader of the Invercargill Youth Orchestra for two years.

Alanna Jones is 19 years old and lives in Whangarei. She plays the double bass for Whangarei Youth Music's String Group and Orchestra, but is also adept on the piano and harp. Alanna is an active participant in the Northland Performing Arts Competitions, paying in solo and group categories.

Beneficial Outcomes of Grant:

The Chair Donor Programme benefits the APO:

- In enabling the Orchestra to move towards paying competitive remuneration to the musicians helping to continue the drive for excellence.
- Multi-year funding gives a level of financial security to the APO.
- The Trusts grant enables ongoing development of the Chair Donor Programme which has been revised to follow on from the removal of tax thresholds for charitable donations in 2008.

Measuring Outcomes:

Feedback by way of marketing reports.

Grants distributed to Auckland Philharmonia since 2000 total \$31,475

Royal New Zealand Ballet General Manager: Ms Amanda Skoog Grant Allocation: \$7,000

Project Funded: Annual

Partner a Dancer scheme Recognising that we've been supporting the Royal New Zealand Ballet (RNZB) for the best part of 37 years, the Trust is progressively increasing our grant to \$10,000pa.



Alessia Lugoboni

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 Phantomder Oper in Stuttgart. The 23rd year old, who speaks Italian, English, German and French, joined the company in 2004. Our Trust has sponsored her since then.

Recent roles include being one of the ugly stepsisters in Cinderella last year and various roles with Romeo & Juliet this year including the angel and one of the bridesmaids. Previous performance roles 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.

Beneficial Outcomes of the Grant:

Supporting Partner a Dancer enables the company to provide beyond dance career opportunities and extramural opportunities such as media training.

This 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.

Measuring Outcomes:

A report on the development of Alessia and her roles throughout the year and a report on the RNZB and its successes of each season.

Grants distributed to the Royal New Zealand Ballet since 1971 total \$125,075

Tower NZ Youth Choir Artistic Director: Dr Karen Grylls Grant Allocation: \$1,100

This organisation provides advanced choral training, performance and touring opportunities for nationally selected young New Zealand singers aged between 18 and 26.

Project Funded: Two scholarships, (\$550 each), 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.

Penny and I met with both the chair of this Trust, Judith Harvey, and the new CEO Geoff Wane, in April this year to review the funding criteria. As a result of that meeting it was agreed that our grant could be broadened to include a specific project benefiting the choir as whole, decided on a case by case basis, Penny and I visited a choir workshop also. We were greatly impressed with the quality of the teaching and the receptiveness of the students. Their harmonies were just superb.

Rua and Clarrie Stevens Charitable Trust scholarship recipients:

Laura Caygill - Laura Caygill successfully auditioned for the 2008-10 New Zealand Youth Choir in December 2007. She is passionate about choral singing and has participated in choirs from a young age. She coached university choirs when she was completing her undergraduate degree at Otago University.

Laura will use the Rua and Clarrie Stevens Scholarship to improve both her vocal and musicianship skills, which she believes will help to develop her ability as a choral singer and benefit the NZ Youth Choir as a whole. Laura is currently receiving vocal tuition from Rosemary Turnbull, and is studying for a Graduate Diploma of Journalism at Canterbury University.

Mevagh Sanson - Mevagh Sanson successfully auditioned for the 2008-10 New Zealand Youth Choir in December 2007. She participated in a number of choirs and competed in singing competitions in Whangarei while at school. In 2008 Mevagh moved to Wellington to begin a BA in Psychology at Victoria University.

Mevagh will use the Rua and Clarrie Stevens Scholarship to improve her musicianship skills which, combined with her vocal ability, she believes will assist her enjoyment of choral singing and improve her contribution to the NZ Youth Choir. Mevagh is currently receiving vocal tuition from Emily Mair.



Laura Caygill and Mevagh Sanson

Beneficial Outcomes of the Grant:

Providing an on-going scholarship programme with strong community support. Encouraging young singers to increase their vocal and musical skills, thus benefiting the choir as a whole.

Measuring Outcomes:

- Recipients must meet specific criteria
- Measured against that criteria.
- Regular reporting to the Trust as well as a full accountability report.
- Opportunity to meet recipients, and where possible involve them in Trust activities.

Grants distributed to Tower NZ Youth Choir since 2002 total \$3,500

COMMUNITY

Distributions totalling \$8,000 representing 13% of total grants were made to five organisations. An increase of 105% from last year.

**Philanthropy New Zealand
Executive Director: Ms Robyn Scott
Grant Allocation: \$500**

This association was established in 1990 through the vision and drive of the late Sir Roy McKenzie, the J. R. McKenzie Trust, the Todd Foundation, and Sutherland Self Help Trust.

Our Trust has been a member of Philanthropy New Zealand since the early 1990s. It's steady growth, development and growing public credibility over the years has been outstanding. It has been a major player in driving changes to recent government initiatives relating to the more generous treatment of donations to organisations with donee status.

Miscellaneous Grants

**Ruapotakia Marae.
Grant Allocation: \$2,500**

Funds utilised for operating costs for the Glen Innes based Marae.

**Houhanga Rongo
Grant Allocation: \$2,500
Allocated by the Advisory Trustees.**

This is a Maori based organisation, established by Sam Chapman, working positively alongside Maori gangs.

**Business and Professional Women
(BPW- Ethnic Project)
Grant Allocation: \$1,000.**

The Auckland BPW ethnic project is a programme run by the Auckland Business & Professional Club Inc, (of which Penny is a member), bringing together Auckland ethnic women to share their cooking and develop their English conversation focusing on integration for all.

The project has won two awards The National BPW Community Project award 2008 and 2nd place in the BPW International award for 'The Power to Make a Difference through Action'. This award was presented, in an amazing 15th Century Convent, to the Club President Sujatha Anthony, accompanied by Penny Stevens at the International Congress in Mexico City in October 2008.



Cooking and friendship class

Himalayan Trust
Founded by the Late Sir Edmund Hillary:
KG, KBE, ONZ-Adventurer and Humanitarian.
Grant Allocation: \$1,500

With the passing of Sir Edmund in January 2008, and his very moving state funeral, the Trustees and Advisory Trustees took great note of Sir Ed's wish that his Himalayan Trust continues to be supported after his passing.

The Himalayan Trust was one of the very early recipients of our Trust. Our first grant was given in 1972. It was at the instigation of Clarrie who greatly admired Sir Ed's outstanding loyalty and commitment to his Sherpa friends. Clarrie continued to personally direct grants to this Trust throughout the 1970s and 80s. We met Tenzing Norgay Sherpa when Ed brought him out to New Zealand on a nationwide tour.

In early June 2008 Penny and I visited Lady Hillary at her home to discuss our Trust's funding of the Himalayan Trust. As a result we have decided to focus on funding a specific area of the work the Himalayan Trust does on an on-going basis. We agreed to adopt one of the 27 schools established and maintained by the Himalayan Trust. The school we shall be supporting is the Himalayan Dudhkundha Lower Secondary School, at Phaplu.

The majority of the students come from the poor and underprivileged community (or culturally termed as untouchable community of the Blacksmith families.) The school has been refurbished by the Himalayan Trust and both Sir Edmund and Lady June Hillary had a fondness for this school having visited it frequently. The school has no computers or telecommunication facilities, so our grants will be allocated to funding these areas.



Phaplu students with headmaster

Both Penny and I are very keen to visit this school when our Trust has provided sufficient funding for their technological needs.

As part of our objective to remain true to my father, (and his admiration for this quite remarkable individual) we have decided it is an appropriate time to incorporate the Himalayan Trust into our Family of Beneficiaries.

Grants distributed to The Himalayan Trust since 1972 total \$13,000.

EDUCATION SECTOR

Distributions totalling \$14,500 representing 23% of total grants, were made to four organisations.
 An increase of 15% over last year. Two of these are scholarships in the memory of Rua and Clarrie Stevens.

Glendowie College
Principal: Ms Louise Moore
Grant Allocation: \$3,000

This partnership stretches back 15 years. The friendships and mutual respect generated over this time is certainly a testament to how a modest amount donated over a number of years can be useful to both the recipient and the grant maker. The reciprocity from this college to support our Trust's periodic celebrations is without doubt what makes this partnership thrive.

Annual funding of \$3,000 is used to further develop the work of their performing arts areas, enabling students to excel in drama and music.

40 members of the college concert band went to Brisbane on 6th June this year to participate in the Southern Cross Music Festival. They performed alongside other concert bands from New Zealand, as well as Australia and Singapore. The concert band has been joined by a number of upcoming young, skilled musicians this year. They won gold at the KBB Music Festival.

Beneficial Outcomes of the Grant:

- Improvement to the running of drama productions.
- An increase in the quality of both musical instruments and the college's performance groups.
- This benefits both students and the community.

Measuring Outcomes:

- By the College Arts Council, together with staff, parent, and student members.

Grants distributed to Glendowie College since 1994 total \$55,845.



Glendowie College Concert Band

Maxim Institute
Managing Director Founder: Greg Fleming
Grant Allocation: \$4,000
Project funded: Sponsorship towards one intern

The 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.

Our funding assists the running of a summer internship programme for between 6 and 10 university aged young people with demonstrated intellectual and leadership abilities.

This year's intern is Danielle Buchanan-Windfthur. Danielle continued her studies towards a BA in psychology and history at Otago University in the midst of personal tragedy. Very sadly Danielle's father died suddenly several months ago.



Danielle Buchanan-Windfthur

Danielle is a remarkable young woman with a bright and agile mind, a compassionate heart and a bubbly outgoing personality. As her studies draw to an end later in 2008, Danielle will be seeking to re-locate to Wellington and work as a policy analyst.

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.

Measuring Outcomes:

Grants distributed to the Maxim Institute since 2002 total \$14,000.

Clarrie Stevens Memorial Law Scholarship
Grant Allocation: \$4,500

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.

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.

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.

This year's successful joint recipients were Luke Jared Fitzgibbon and Jessica Mary Antoinette Mark. Luke is completing his LLB (Hons) and BSC. He is one of five children and has had to borrow to pay his fees and living costs as he has had to move away from home to attend University.

Jessica is funding herself through University as her father died suddenly two years ago and her mother has spent the last two years re-training at Polytechnic. She is the first person in her family to get a university degree. Jessica works four afternoons a week to help fund her living costs.



Lee, Jessica, Luke and Penny

Clarrie 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.

This year marks the 10th anniversary of this scholarship. In recognition of that the Trustees increased the scholarship to \$5,000 pa. The Trustees further marked 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 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 new award after Clarrie's legal secretary, Joan Bethia Chadwick, who worked for him for over 35 years.

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 me following Rua's death in 1970. Joan was a deeply loved member of our extended family.



Iftikhar Ahmad - Advisory Trustee,
Meghan Zetko - Dunedin
Community Law Centre and
Darren Priday - Advisory Trustee

Lee & Penny, Professor Mark
Henaghan, Dean of Law,
Otago University.

Trust' 10th anniversary - An eclectic collection of Dunedin lawyers, trustees, law lecturers and family members celebrated on Friday the 7th of May 2008 the 10th anniversary of the Clarrie Stevens Memorial Law Scholarship.

Clarrie was a prominent commercial and trust lawyer in Dunedin for more than 40 years before retiring in 1985. After he died, the scholarship was established by the Rua and Clarrie Stevens Charitable Trust to be awarded to a final-year University of Otago law student who excelled in commercial and/or trust areas.

A celebration dinner was held at the University of Otago Staff Club at which this year's recipient, Nicola Tennent was presented with \$5,000.

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

New Horizons for Women Trust (Inc.)

Chair: Ellen McCrae.
Grant Allocation: \$3,000

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.

This is the 11th year that our Trust has supported this unique programme for women. Our recipients are mainly from Maori or Pacific communities. We are very appreciative of the opportunity to accord a scholarship in memory of Rua via this Trust.

The New Horizons for Women Trust also funds individual or group research projects. Under directed supervision in statutory institutions, or the community, issues relating to women and families are examined; the research must 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 Salaalii Tuii. A netball coach, Sunday school helper and mother to three girls aged eleven, nine and two, Samoan-born Sala is working to complete a Diploma in Early Childhood Teaching at Auckland University's School of Pasifika Education. She wants to work in early childhood to assist the development and learning of children as well as providing good quality care. She will use the scholarship for books, equipment and a computer. She is said to be an enthusiastic and determined student who goes the extra mile to complete her assignments. The Trustees have increased the grant to this Trust this year. We will progressively increase the annual grant for this scholarship to \$5,000 pa.

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. 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.

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

ENVIRONMENT

Total distributions amounted to \$7,000, representing 11% of total grants. \$5,000.00 was allocated to the Entrust Foundation.
\$2,000.00 was allocated to a new Trust initiative. It was made to two Habitat Projects, as per below. These distributions represented an increase of 75% over the previous year.

The Trustees have decided that in the future as well as providing on-going funding to the Entrust Foundation, (established by Mr Warren Snow) we will establish a collaborative fund to be allocated between ourselves and Warren.

The Entrust Foundation
Chairman: Mr Richard Morley - Hall.
Grant Allocation: \$5,000

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

Projects Funded:
On-going funding, as per last year, was allocated towards the campaign to introduce Container



Deposit Legislation (CDL) in New Zealand. This funding will enable Entrust to produce and disseminate information, run workshops, meet with key industry stakeholders, politicians and not for profit groups who will benefit from the legislation (such as community recyclers and the scouts) to support Entrust's efforts. Some funding was also allocated towards administration costs.

Beneficial Outcomes of the Grant:

Increased public and political awareness of the benefits of CDL, improving the likelihood of it being introduced in New Zealand. Potential for CDL, if introduced in New Zealand, to be introduced in other parts of the Pacific, resulting in waste and litter reduction and creation of local jobs. Potential for CDL to act as a model for product stewardship programmes for a wider range of product waste over the coming years.

Measuring Outcomes:

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 \$17,900

HABITAT PROGRAMMES

Grant Allocation: \$2,000

These programmes were overseen by Warren Snow, and are situated in Northland. Two programmes were funded in 2008.

Ahipara Primary School / Grant Allocation: \$500

Funds allocated towards completing the fencing and planting on the Western side of the Wiroa river between the bridge and the school. The objective being to continue making progress towards a healthy river. Approximately 7km long, Wiroa flows behind Ahipara School located 500 metres from the beach.

The Bushland Trust / Grant Allocation: \$1,500

Since its inception in 1990, the Bushland Trust has been active in the Sweetwater area. It has worked to stop stock access through fencing, cleared invasive weeds, created walkways and filtration zones, and embarked on re-vegetation of native plantings.

Most of the projects have been concentrated on the Sweetwater lakes of Lake Heather, Lake Rotoroa, and Lake Ngatu approximately 20 km Northwest of Kaitaia.

These funds were allocated for weed control for the Sweetwater Lake Project, near Kaitaia, Northland. A stipulation of this grant was that no chemicals be used for weed control as there are other more environmentally friendly and equally effective ways to control weeds.



Penny & Warren Snow at Lake Ngatu

FAITH BASED GIVING

Distributions totalling \$13,050 representing 21% of total grants were made four organisations. An increase of \$6,570 from last year. It included a significant one-off grant to fund a church capital expenditure related project.

Both Rua and 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: \$960**

The weekly church service at the Crystal Cathedral in Garden Grove, California is recorded and televised internationally. The programme is known for its positive messages, interviews with people who have overcome challenges and incredible music.

Hour of Power's worldwide audience (including New Zealand) is estimated to be over 20 million people each week.



New office opened on 1st August 2008

The New Zealand Trust is funded through the generosity of donors in New Zealand and the office provides materials, information and merchandise related to the Sunday programmes. Since coming to air on TV3 in 1997, Hour of Power has consistently been the most viewed and highest rated religious programme on that channel.

Funds distributed since 2006 total \$2,520

**GLEN INNES CATHOLIC CHURCH
Parish Priest: Neil Darragh
Grant Allocation: \$1,600**

This is our local church, based in Glen Innes, which is principally of Pacific Island ethnicity. This parish has a tremendous vibrancy, warmth and a great feeling of belonging. Our grant contributes to the honorarium of a part-time Parish Care Coordinator.



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

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.

Funds distributed since 2005 total \$3,500

Te Waipuna Puawai Mercy Oasis
Manager: Ms Puamiria Maaka
Grant Allocation: \$2,500.00

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.

Projects Funded:

\$1,500 for the personal development programme - Dressing and Grooming

This is a new programme which is part of the adult community education that covers grooming and dressing with confidence on a limited budget. It also provides help with CV and interview preparation. It's delivered as a one hour workshop each week over an eight week period, coinciding with the school term duration. The funds covered the cost of the consultant to deliver this programme.

16 women completed the eight week modules and availed themselves of the opportunity to learn how to dress for success and build confidence through their appearance. Three of the women who participated were keen to improve their presentation as an aid to their job searching. They are now in employment.



Family Wellbeing Fund:

\$1,000. This fund provides emergency relief and crises support to families at risk in the community.

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. It also assists in budgeting, teaching the women how to make wise purchases.

Funds distributed since 1994 total \$4,940

Matihetihe Ki Tamaki Trust
Grant Allocation: \$7,990

A one-off grant to fund the re-roofing of the Wharekarakia (Church), Hato Hemi at Mitimiti.

The Matihetihe Marae, where the church is based, is located at Mitimiti on the west coast of North Hokianga. The original Wharekarakia was built in 1886. Hato Hemi Church was built by Father Charles Kreymborg MHM. It was blessed and opened on Easter Sunday, 1916, and is one of the few churches on Maori Land, as part of the Marae. As such, it is owned by the Marae and not the Church. The Tupuna built the church for the people. The Tupuna, Atama Paparangi, was one of the first Maori to be converted to

Catholicism and was present at Bishop Pompelien's first mass at Totara Point.

Wharekarakia is constructed of solid kauri timber, much of which is irreplaceable. It has been and remains the heartbeat for the catholic whanau and has its own wairua. It also has a museum, housing a number of old chalices and pounamu.

The total cost of the project was \$10,676



YOUTH

Total distributions of \$5,653 representing 9% of total grants were made to two organisations.

Tamaki Pathways Trust
Executive Director: Ms Pene Loza
Grant Allocation: \$5,153.00.

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

I am a founding Trustee of Tamaki Pathways, but retired both as Chair and Trustee in December 2007. When one has the honour of serving communities in roles such as these, they are opportunities to be treasured. The tremendously dedicated staff and volunteers who run these organisations are, in my view, the real heroes in today's society.

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 programme. This is well above the national average for Youth at Risk Trusts. These youth are principally of Maori and Pacific ethnicity.

Project Funded:

Funds allocated towards a consultant to assist in marketing and lifting the profile of the Trust. The long term goal being self-sufficiency, therefore less dependence upon the inherent requirements associated with government contracting.

Using the consultant's expertise Tamaki Pathways intends to access a broader spectrum of the community and thus expand the Trust's funding mix and funding base. This should ultimately lead to wider community support for achieving the objectives of the Trust.

Beneficial Outcomes of the Grant:

Opportunities for potential funders and supporters to assist in addressing the rising social needs of youth at risk and their whanau

within the Tamaki region. Strong relationships built with potential new funders sourced through networking.

Measuring Outcomes:

Measured through new funders coming on board and the amount of funding received and its duration.(1-3 yr contract). These outcomes will be reported back through an accountability report confirmed by the audited accounts.

Funds distributed to the Tamaki Pathways Trust since 2000 total \$29,387.



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

Otago Youth Wellness Trust
General Manager: Ms Barbara Payton
Grant Allocation: \$500

This Dunedin based youth trust was established in 1996. The inaugural Chair was Pat Harrison, former Principal of Queens High School. Currently this Trust works with over 350 young people annually in a variety of extremely well evaluated and successful programmes.

Amongst the highlights of the year for the Wellness Trust were:

- the everyday “successes” that we are fortunate enough to share with the young people that we work with. Their resilience is astounding.
- securing community funding for a pilot providing early intervention for primary age truants.
- leading a community development project in the North East Valley as part of the MSD local services mapping exercise.

This organisation is a favourite port of call for Penny and me whenever we travel to Dunedin to represent the Trust at y late father’s Law Scholarship presentations.

Funds distributed to the Otago Youth Wellness Trust since 2002 total \$2,350



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