

MESSAGE FROM THE CHAIR



This, our first 'official' newsletter, is an appropriate and timely opportunity to reflect on our progress over the past year in the establishment of the Clutha Foundation, and acknowledge our many generous supporters who have and are

contributing to the growth in our funds, and to our operational costs.

As we come to the end of the 2019 calendar year we have achieved:

- Funds under management at Craigs Investment Partners of \$130,000
- Pledges towards the establishment of Named Endowments of a further \$350,000
- Cash in hand to meet administration and operational costs of \$27,000, and
- Pass through funds available now for grant making into our community of \$50,000

Gifts to the Clutha Foundation are being received from many people in a variety of ways. It is particularly heartening to me to see how our Workplace Giving has been embraced by a number of employees in the businesses we have approached so far - showing just how important it is to recognise the long term value of giving a little, often.

We now have five Named Endowments documented and established by generous people who have identified communities and/or causes within the Clutha District who benefit in perpetuity from the income earned on their pledge to the Foundation. I want to pay particular tribute to Barry and Helen Pannett for their recent gift of \$100,000 to establish an endowment for district-wide charitable causes. This fully funded endowment has been pivotal in kick

starting our funds under management, and was hugely appreciated by the trustees

A further significant milestone in the last two months has been the appointment of Denise Dent as our part-time Executive Officer. Being a person who has demonstrated considerable commitment to her community, and empathy for what the Clutha Foundation can achieve within the district, Denise has the appropriate skills to attend to the promotion and administration of the Foundation.

Finally, I do want to pay tribute to my fellow trustees for their passion for the Clutha Foundation, and their tireless input over the past year into establishing our policies and procedures, and the promotion of the Foundation.

The establishment and growth of the Clutha Foundation is a long-term strategy which, to gain and maintain credibility, needs to be trusted for its values, integrity, and understanding of the needs of its community - and the trustees are playing a vital part in this process.

Wishing all our supporters a happy and safe festive season.

Bill Thomson
Chair

Our Mission: connecting generous people with causes that matter

Our Vision: Inspiring our community through philanthropy

Our values:

We care for our community

We foster generosity

We invest wisely

We distribute equitably

FUNDING ROUND OPEN!



The Clutha Foundation is building up its funding through the generosity of local donors who have pledged support through bequests, gifts and Workplace Giving. It has also been given pass through funding from the Otago Community Trust, which will allow it to begin to distribute grants to local groups and not-for-profit organisations within the various communities of the Clutha District early in 2020. To this end we are welcoming applications for funding from groups and organisations that meet our current priorities of Youth, Health and Education.

Application forms can be downloaded from their website www.cluthanz.com/cluthafoundation or from info@cluthafoundation.org.nz

The closing date for applications is 10 February 2020. Phone Fiona Hancox 027 217 3960 or Kerry Seymour 027 437 2586 for further information.

CHRISTMAS GIFTING



The Clutha Foundation is thrilled this Christmas to be working with Craigs Investment Partners in facilitating their Christmas Gifting programme in our local area. Craigs have recently announced

nationally the establishment of a new Community giving initiative, formalised through the establishment of the Craigs Community Fund. This incorporates Christmas Gifting; the establishment of a Community Fund in partnership with local community foundations; and Workplace Giving, which empowers Craigs employees to personally gift to local charities, supported by the Craigs business that will match their personal contribution – up to \$500 per year, per employee. This is a wonderful example of philanthropy at both an individual and a

corporate level and will be much appreciated by the beneficiaries.

Through the generosity of Craigs in Gore, the Clutha Foundation has been gifted \$1500 which will be distributed to local foodbanks within the Clutha district to support families through what can be a very challenging time of year.



This partnership between Craigs Investment Partners and local Community Foundations across New Zealand will continue to benefit local communities for many years to come.

POWERFUL CONNECTIONS

The Clutha District is special. Unlike many areas around the country, ours is a network of many communities, each with their own unique identity, strengths and needs. Although this diversity is part



of what makes us who we are, it also presents challenges for organisations like ours that want to support, respectfully and appropriately, each of those communities. Our trustees do represent some of that diversity, but to be truly representative of our communities and to ensure

we have a balanced picture of the needs of the district, we are looking to recruit volunteer Ambassadors. These will be people with strong connections and networks within their communities, who have an insight into the needs of their community and who can work with us to encourage local generosity and philanthropy.

Ambassadors will be supported by the Clutha Foundation to understand how we work and the ways that people can give through us to support local projects and groups in perpetuity. If you are interested in learning more about the Ambassador programme, please contact us at info@cluthafoundation.org.nz

MAKING A DIFFERENCE

Barry and Helen Pannett will be well known to many residents of the Clutha District, having lived and farmed in the Clinton area for many years. Whilst they now reside at Speargrass, Arrowtown, they still retain their family farming property at Wairuna, and their affinity for the Clutha District.



Helen and Barry Pannett

Barry and Helen have a long history of community involvement and philanthropy driven by their philosophy of giving back to the district that has been good to them as a place to live and farm. But they struggled to identify a Charitable trust dedicated to, and controlled within, the Clutha District that was an appropriate vehicle for their willingness to 'give where they live'.

With the formation of the Clutha Foundation they were motivated to establish a family endowment that will ensure that the income in their gift will benefit the community, forever. In making a lump sum gift

to the Foundation of \$100,000 Barry and Helen have shown great inspiration and leadership, have signalled great confidence in what the Foundation can achieve, and given a significant boost to our funds under management at a crucial time in our establishment.

Our heartfelt thanks to Barry and Helen from all the Trustees!

INSPIRATION ON THE JOB



It has been a steep learning curve for me since starting work for the Clutha Foundation a few weeks ago. Until answering the job advertisement, I had never heard of Community Foundations

– now I am on the road to becoming an expert (although not very far along the road yet!). What a wonderful concept and how well suited to New Zealand. I know Community Foundations exist elsewhere in the world, but it seems to me that the idea of local philanthropy, of generous people wanting to provide for others in their community encapsulates values that New Zealand is built upon.

I have lived in this fantastic country for a decade now, having migrated here from the UK, and that is one of the things that first struck me. Initially in North Canterbury, and now here in Clutha, I find the willingness of people to give time and money to help others is exceptional, and something I had not come across to anywhere near the same extent in England. I'm proud to be part of an organization that is supporting and facilitating this.

Denise Dent,
Executive Officer

"We make a living by what we get, but we make a life by what we give."

Winston Churchill

GIVE WHERE YOU LIVE

FREQUENTLY ASKED QUESTIONS

What is a Community Foundation?

- It is a registered charitable trust that is set up to inspire generosity in its local area and provide ongoing support for the charities and community groups that operate there.
- The capital remains invested forever, and it is the income that is distributed each year.
- In summary, it is a perpetual and parochial charitable trust established to encourage philanthropy for the benefit of a local community

Why a Clutha Foundation?

The emergence of community foundations in New Zealand is a response to the ever-increasing awareness that people have a real desire to make a lasting difference to their people, their environment and their community.

The Clutha Foundation has been established to:

- take advantage of the inherent generosity of residents of the Clutha District
- to provide an overarching and unapologetically parochial charitable trust for the benefit of Clutha District all residents, and organisations
- proactively identify projects and opportunities for the benefit of, and support of residents and organisations within the Clutha District
- It is a response to the lack of Charitable Trusts based in, and located within the Clutha District
- It also provides a viable option for people who **live** in the Clutha District to **give** in the Clutha District



Hamish Anderson talking to Clutha District Council employees about Payroll Giving earlier this month.

Ways to Give:

- Living giving - Donations during your lifetime
- Leave a gift in your will - leaving a gift in your will to your own named fund or to the Community Foundation's general fund
- Payroll Giving – small amounts, regularly, which over time grow to be something significant for your community
- Founding Forty donations or Payroll Giving with the specific indication that these gifts are utilised for The Foundation's administrative costs
- Giving Circle – think a social 'book club without the books' the social way to give and to support causes that you choose collectively
- Charitable Trusts – existing or looking to establish: Community Foundations can manage compliance requirements, investments, effective grant making and more. We can provide the means to run a charitable trust without the significant workload
- The Trustees will support individuals or community organisations establishing a private endowment – ensuring the annual income will continue to go to a named cause – forever.

If you would like someone from the Clutha Foundation to come and talk to you, your organisation or your workplace about what we do and the ways you can get involved, please contact Denise, our Executive Officer:

p: 0204 189 4868

e: denise@cluthafoundation.org.nz

