



TRUST WAIKATO
TE PUNA O WAIKATO

2008-10 STRATEGIC PLAN

Whakamana i te mauri e haere ai Te Puna o Waikato
VALUING THE ESSENCE OF TRUST WAIKATO'S JOURNEY



E tautoko ana, e awahina ana i te hira tāngata o Waikato whaanui
SUPPORTING AND ENHANCING THE GREATER WAIKATO COMMUNITY

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PURPOSE

HELPING ORGANISATIONS
CARRY OUT CHARITABLE,
CULTURAL, PHILANTHROPIC
AND RECREATIONAL PROJECTS

Trust Waikato was established by government statute in 1988 to hold the shares of Trust Bank Waikato. These shares were sold in 1996 and the Trust now holds a range of international and domestic investments. Each year the Trust distributes a percentage of its profits generated from the global investment portfolio.

Trust Waikato's purpose is to help organisations carry out charitable, cultural, philanthropic and recreational projects of benefit to people in its region.

Our funding area includes the districts of Thames/Coromandel, Hauraki, Matamata Piako, Waipa, Waikato, South Waikato, Waitomo, Otorohanga, Ruapehu and Hamilton City.

The Trust acknowledges that this area includes much of the lands of the Tainui waka and thus the people of Waikato, Raukawa, Hauraki and Maniapoto.

The population of the greater Waikato area is estimated at 385,000 or 9.4% of New Zealand's total population. In this area, around 57% of people live in urban areas. The population is expected to grow by 15% over the 20 years to 2026 to reach around 426,800. The region's ethnic mix is characterised by higher proportions of Māori (nearly 20% compared to 14% nationally), but lower proportions of Asian and Pacific Island peoples than nationally. The regional population has a slightly younger average age than New Zealand as a whole.

Although rich in resources and capacity to address social, cultural, economic and environmental well-being, the size, diversity and inequalities of the area present challenges for some groups and communities.



VISION AND MISSION

OUR VISION is for resilient and vibrant communities

Trust Waikato supports and enhances the greater Waikato community through being a vital and effective funder.

OUR PRINCIPLES

Principle One

Valuing and respecting Māori as Tangata Whenua

Principle Two

Valuing and recognising cultural diversity

Principle Three

Valuing the current and future worth of the Trust's resources

Principle Four

Valuing and promoting a community development approach

Principle Five

Valuing and supporting community organisations

We also recognise the principles of:

- Kaitiakitanga *guardianship*
- Tika *fairness, rightness*
- Manaakitanga *respect, kindness to people*
- Whanaungatanga *kinship, relationship, sense of connection*



OUR ROLES

Trust Waikato is proud of its activity within the local, national and international communities. The Trust acknowledges that it performs a variety of roles depending on the expectations of community partners and its own, desired, response.

- Investor
- Funder
- Partner
- Facilitator
- Advocate
- Advisor
- Leader
- Evaluator
- Employer



PRIORITIES



OUR PRIORITIES

Trust Waikato supports the things that make our corner of the world a better place.

We focus on projects, programmes and organisations which contribute to the well-being of communities. We've traditionally had funding priorities around increasing participation in community activities; youth development; preserving our history and cultural identity; and encouraging groups to work together and to share facilities for community benefit. We also have a particular focus on working with Māori, Pacific peoples and ethnic communities and their supporters.

For 2008-2010, Trust Waikato asked a range of community organisations, local and central government agencies and iwi groups what the issues were in their communities, and how Trust Waikato could best make a difference. Funding priorities (below) and key activities (on the following pages) have been developed from the Trust's strategic review of current and desired work.

FUNDING PRIORITIES

Supporting Iwi and Māori Communities

Trust Waikato has a significant commitment to honouring Te Tiriti o Waitangi.

The Trust wishes to support projects and organisations which are at the heart of resilient and vibrant whanau, hapu and iwi.

Preserving Cultural Identity

Our community's history and sense of identity is important to us all.

Alongside our desire to work in partnership with Māori, we also wish to support significant initiatives of Pacific peoples and other ethnic communities.

We support projects that preserve and protect our history and artifacts and those which promote understanding of the culturally diverse nature of our region.

Supporting Families and Young People

We strongly support those programmes which deal with the underlying causes of social problems. This includes projects which support families, protect children and promote participation of young people in community activities.

We are keen to help make sure all members of our communities have access to quality health, welfare, recreation and education services.

Strengthening Communities

Ensuring that all people have opportunities to feel part of their community – for education, work or leisure – is important to Trust Waikato. The Trust will support projects or programmes provided for people who have been denied a quality of life enjoyed by the community.

Some communities have distinct needs – perhaps because of their size, location or population characteristics. We'll support community groups working actively to service these needs in identified areas.

Improving community resources is, literally, a building block towards improving social well-being for a community. We encourage schools, sports and recreation clubs and community groups to share resources and facilities where possible.

Promoting Organisational Effectiveness

Great work in the community requires strong and viable organisations. The Trust funds the management and operational infrastructure of groups. Getting (new) people involved in community work is a common problem through the region, so we are going to focus on promoting, training and supporting volunteers and their contributions.

Trust Waikato would also like to show it is taking responsibility for reducing its own ecological footprint – we'll be working hard to improve our business practices to ensure long-term sustainability of our organisation. The Trust is also keen to see other community organisations working to reduce their environmental impact.



PRINCIPLES AND OBJECTIVES

PRINCIPLE ONE

‘Valuing and Respecting Māori as Tangata Whenua’

OBJECTIVES

- Acknowledge and value the Tangata Whenua status of Māori
- Operate in a manner consistent with Te Tiriti o Waitangi
- Honour Māori cultural concepts and practices

OBJECTIVE 1.1

Acknowledge and value the Tangata Whenua status of Māori

Trust Waikato acknowledges the tangata whenua status of Māori.

The Trust respects:

1. that the guidance of a kaumatua and other advisors is essential to the Trust in relation to tikanga, kawa, Te Tiriti o Waitangi and commitments to tangata whenua;
2. that kaumatua, Māori trustees and staff bring the aspirations of Māori to the Trust;
3. that Māori trustees may wish, from time to time, to meet together on issues of their choosing, and to bring to the Trust a shared view as tangata whenua.

OBJECTIVE 1.2

Operate in a manner consistent with Te Tiriti o Waitangi

Trust Waikato is committed to achieving the aims and objectives of Te Tiriti o Waitangi, within the partnership described in Te Tiriti.

The partnership is between tangata whenua, the indigenous people of this land, and tangata tiriti, the many diverse peoples who have come to this land. The Trust honours and respects all those within these partnerships.

The Trust acknowledges:

1. that Māori wish to live as Māori and contribute to the well being and development of our nation.

OBJECTIVE 1.3

Honour Māori cultural concepts and practices

The Trust agrees:

1. that the Trust’s donations should include support for those iwi, hapu and community organisations and projects which contribute to the preservation and protection of cultural identity and belonging;
2. that donations will support resilience and vibrancy for Māori and iwi communities.

ACTION

- Educate ourselves
- Build relationships
- Fund work significant to Māori

PRIORITIES

Supporting Iwi and Māori Communities

Preserving cultural identity

Supporting families and young people

Strengthening communities

Promoting organisational effectiveness



PRINCIPLE TWO

'Valuing and Recognising Cultural Diversity'

OBJECTIVES

- Incorporate multi cultural concepts and practices
- Recognise and celebrate the cultural diversity of the region

OBJECTIVE 2.1

Incorporate multi-cultural concepts and practices

The Trust:

1. expects that groups of trustees with similar ethnic backgrounds may wish, from time to time, to meet together on issues of their choosing, and to bring to the Trust a shared view, and this may mean Pacific trustees, Pakeha trustees, other ethnic groupings of trustees, or some combination of these;
2. acknowledges that it needs to listen and respond to the needs of the Pacific, migrant, refugee and other ethnic communities.

OBJECTIVE 2.2

Recognise and celebrate the cultural diversity of the region

The Trust agrees:

1. that the Trust's donations should include support for those community organisations and projects which contribute to cultural identity and belonging, as identified within each culture.

ACTION

- Build relationships
- Fund diversity

PRIORITIES

Supporting Iwi and Māori Communities

Preserving cultural identity

Supporting families and young people

Strengthening communities

Promoting organisational effectiveness



PRINCIPLE THREE

'Valuing the Current and Future Worth of the Trust's Resources'

OBJECTIVES

- Manage the Trust's financial resource prudently and efficiently
- Maintain appropriate governance structures and processes
- Ensure sustainable organisational effectiveness

OBJECTIVE 3.1

Manage the Trust's financial resource prudently and efficiently

Trust Waikato is committed to making a positive contribution to the financial, social and environmental wealth of the community by the prudent and efficient management of the Trust's financial resources.

The Trust will ensure this by:

1. safeguarding the Trust's assets for future communities through maintaining the real value of the capital fund;
2. following the guidelines for socially responsible investment;
3. providing a range of opportunities for stakeholders to utilise funds;
4. recognising and investing in taonga as past, present and future community assets.

OBJECTIVE 3.2

Maintain appropriate governance structures and processes

Trust Waikato is committed to providing sound community leadership through maintaining appropriate governance structures and processes.

The Trust will demonstrate this by:

1. undertaking a variety of roles within the local, national and international environment as appropriate: leader, funder, investor, partner, advocate, manager;
2. utilising the knowledge and experience of past and present Trustees to strengthen relationships and understanding;
3. following robust decision-making processes;
4. providing opportunities for trustees to develop their skills in effective governance;
5. reviewing trustee performance regularly;
6. ensuring work practices are documented and organisational knowledge is accessible to Trustees.

OBJECTIVE 3.3

Ensure sustainable organisational effectiveness

Trust Waikato's commitment to organisational effectiveness emphasises the contribution of people, the work environment and the systems and processes in carrying out the Trust's work successfully.

The Trust will promote this by:

1. reinforcing the Trust's reputation as an organisation that has integrity, whose processes are equitable and open;
2. modelling the corporate values of clear communication, fairness and integrity, working together and celebration;
3. utilising and valuing the skills and knowledge of staff;
4. ensuring work practices are documented and organisational knowledge is accessible to staff;
5. providing a work environment which promotes health and well-being;
6. investigating ways of reducing the organisation's ecological footprint.

ACTION

- Acknowledge Trustees as a resource
- Acknowledge staff as a resource
- Review financial governance
- Review corporate policies
- Investigate sustainable business practices

PRIORITIES

Supporting Iwi and Māori Communities

Preserving cultural identity

Supporting families and young people

Strengthening communities

Promoting organisational effectiveness



PRINCIPLE FOUR

'Valuing and Promoting a Community Development Approach'

OBJECTIVES

- Encourage resilient and vibrant communities
- Respond to community needs
- Work in partnership
- Evaluate achievements

OBJECTIVE 4.1

Encourage resilient and vibrant communities

Trust Waikato is committed to building strong communities which have the resources they need to take responsibility for their future.

The Trust will support this by:

1. advocating for family/whanau/communities to 'have a voice' and to take part in consultation and decision-making;
2. providing resources so that organisations can undertake their work;
3. recognising that community development occurs along a continuum;
4. encouraging high participation levels in a range of community activities.

OBJECTIVE 4.2

Respond to community needs

Trust Waikato is committed to recognising and celebrating the diversity of this region and its people and the range of potential solutions to community issues.

The Trust will achieve this by:

1. getting to know its communities and people well – and understanding their needs;
2. being culturally aware and tolerant;
3. communicating openly, talking with communities and stakeholders;
4. recognising that communities can identify their own issues and formulate solutions;
5. acknowledging that there will be a variety of potential solutions, methods and results;
6. responding creatively and flexibly to community needs.

OBJECTIVE 4.3

Work in partnership

Trust Waikato is committed to building robust, meaningful relationships to achieve enduring results for our communities.

The Trust will seek this through:

1. being a vital, fair and supportive funder;
2. working collaboratively with others to achieve action/find a solution.

OBJECTIVE 4.4

Evaluate achievements

Trust Waikato is committed to celebrating achievements.

The Trust will encourage community groups, leaders and key stakeholders to:

1. identify what success means to their community and to evaluate achievements;
2. honour successful community stories.

ACTION

- Conduct and/or commission research into community needs, as appropriate
- Build relationships
- Initiate partnerships based on key priorities

PRIORITIES

Supporting Iwi and Māori Communities

Preserving cultural identity

Supporting families and young people

Strengthening communities

Promoting organisational effectiveness



PRINCIPLE FIVE

'Valuing and Supporting Community Organisations'

OBJECTIVES

- Ensure Trust Waikato funding is accessible
- Enable community organisations to do their work
- Encourage sustainable practices
- Promote participation
- Evaluate effectiveness

OBJECTIVE 5.1

Ensure Trust Waikato funding is accessible to the community

Trust Waikato's commitment to fair and equitable funding means that the community must have easy access to the donation process.

The Trust will achieve this by:

1. providing accessible friendly information and services to enquirers;
2. widely promoting the Trust's funding processes so that all groups have the opportunity to apply.

OBJECTIVE 5.2

Enable community organisations to do their work

Trust Waikato's commitment is to having a sustainable, well-informed and connected community sector.

The Trust will achieve this by:

1. valuing community organisations for the work they do;
2. focusing on organisations which contribute to the well-being of communities;
3. supporting the infrastructure of community organisations: physical resources, governance, management structures and staff training, internal systems and processes;
4. respecting the diversity of service delivery within the community;
5. encouraging collaboration with other agencies/stakeholders.



OBJECTIVE 5.3

Encourage sustainable practices

Trust Waikato is committed to providing individuals and groups with the resources, skills and knowledge to maintain effective organisations in the longer-term.

The Trust will support this by:

1. encouraging organisations to improve operational effectiveness;
2. assisting organisations to identify their core missions, values, vision and priorities;
3. advocating for the community sector on key issues;
4. demonstrating best practice in its own processes and decision-making.

OBJECTIVE 5.4

Promote Participation

Trust Waikato is committed to ensuring all people have opportunities to contribute to the well-being of their community.

The Trust will assist this by:

1. promoting involvement of individuals in community organisations;
2. ensuring volunteers are supported and acknowledged.



'Valuing and Supporting Community Organisations'

OBJECTIVE 5.5

Evaluate Effectiveness

Trust Waikato is committed to encouraging achievement and accountability through recognising and celebrating successful organisations.

The Trust will demonstrate this by:

1. enabling organisations to determine their own accountability methods;
2. celebrating organisational achievements;
3. regularly evaluating the work of Trust Waikato.

ACTION

- Focus on promoting and supporting volunteers in community organisations
- Investigate a wider range of funding options/eligibilities
- Improve donation process
- Promote organisational sustainability

PRIORITIES

Supporting Iwi and Māori Communities

Preserving cultural identity

Supporting families and young people

Strengthening communities

Promoting organisational effectiveness





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