



A YEAR OF GIVING

ANNUAL REPORT 2020



WELCOME

The past financial year has been one of growth and doing what we do best at The Gift Trust –connecting our donors with the organisations making the biggest difference on the ground.

We have welcomed many new donors, including individuals, families and companies who want us to help with their giving plans. The funding we manage on behalf of our donors has grown, and we gave away 44% more donations than we did last year.

The charitable causes we have given to have been many and varied because they are driven by our donors interests. This year we have noticed an increase in the amount of environmental funding our donors have given as highlighted on page 6.

The end of the financial year coincided with the Coronavirus pandemic and despite it being a challenging time for many we were delighted to see donations from our donors increased. Many of our donors responded to the crisis by increasing their funding to charities who were helping those in need. You can read about one example, the “Caremongering fund”, on this page.

Over the next year we will be helping our donors to give with greater confidence and deeper effect. Together, we’re making good happen.

Cheryl Spain (Executive Director) and Glen Saunders (Chair)



On behalf of the trustees: Alanna Irving, Anake Goodall, Annette Culpan, David Woods and Philip McKinstry.



Student Volunteer Army

Caremongering is contagious

When the COVID-19 pandemic turned the world on its head in March, a global Caremongering movement sprung up to support communities by spreading acts of compassion.

The Namaste Foundation, a Gift Trust account holder, created a \$100,000 Caremongering fund to support the urgent funding needs of vulnerable communities in the Wellington region. Through a simple application process, local community groups and charities could apply for funding to cover food supplies for vulnerable or at-risk communities, medical supplies, personal protective equipment (PPE), and to cover funding gaps due to the COVID-19 crisis.

Funding to date has included: The Common Unity Project Aotearoa, Student Volunteer Army, Eat My Lunch, Shields Up, Kaibosh, Wellington City Mission, Wesley Community Action, Kiwi Community Assistance, Shift Foundation, Youth Development Trust Wellington, Zeal Education Trust and Mary Potter Hospice.

Kiwi charities will continue to feel the financial impacts of COVID-19 in the year ahead. We welcome additional donations to the Caremongering fund.



Manaiakalani Education Trust



Youth Initiative Program

An appetite for giving

Restaurant Brands New Zealand Limited specialises in managing global, multi-site retail food brands in New Zealand, Australia and Hawaii. In late 2019 the company placed \$100,000 in an account with The Gift Trust, as the first step in an ongoing gifting programme.

“Restaurant Brands is a large employer of young people, so we have a natural fit with youth-orientated charitable causes that align with our values - supporting the welfare of communities through breaking down the barriers to quality education that some youth in New Zealand can face”

The Gift Trust undertook a piece of corporate giving research for Restaurant Brands to identify potential charities that met their criteria. So far, donations include \$35,000 to Birthright New Zealand, which supports single-parent families, and \$35,000 to the Manaiakalani Education Trust, supporting disadvantaged Māori and Pasifika students in Auckland.

Helping young Kiwis achieve great things

An anonymous donor through The Gift Trust has provided funding to set up an annual scholarship for a young New Zealander to attend the International Youth Initiative Program (YIP), based in Sweden.

YIP is a one year course based in Sweden that brings together up to 40 young people, aged between 18 and 28, from all over the world. YIP focuses on social entrepreneurship training and aims to strengthen young people’s capacity to take personal and collective initiative in the face of current global challenges.

For our donors, the aim is to encourage New Zealanders to become successful societal entrepreneurs and to achieve their potential.

The scholarship provides up to \$10,000 (depending on the applicants financial circumstances) to one young New Zealand resident per year - providing half the costs to attend the program in Sweden.

Saci Reily-Jasper was the 2019 scholarship recipient.

OVERVIEW

For the financial year to 31 March 2020

\$916,857

new donor funds received

\$5.76 million

total donor funds under management

97

donations made this year

\$538,301

donations made to charities this year

\$49,000

largest donation made this year

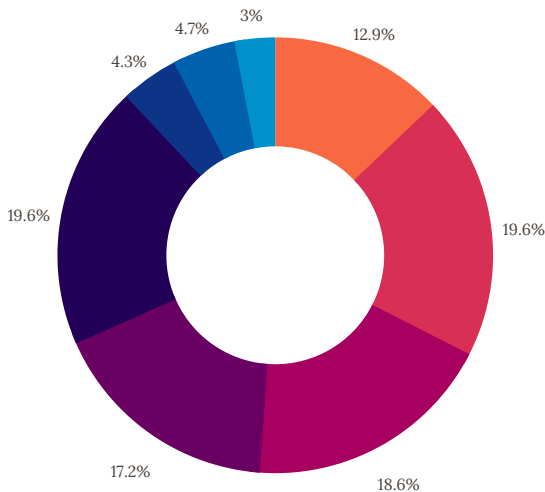
+44%

more donations made than in previous year

\$1,756,499

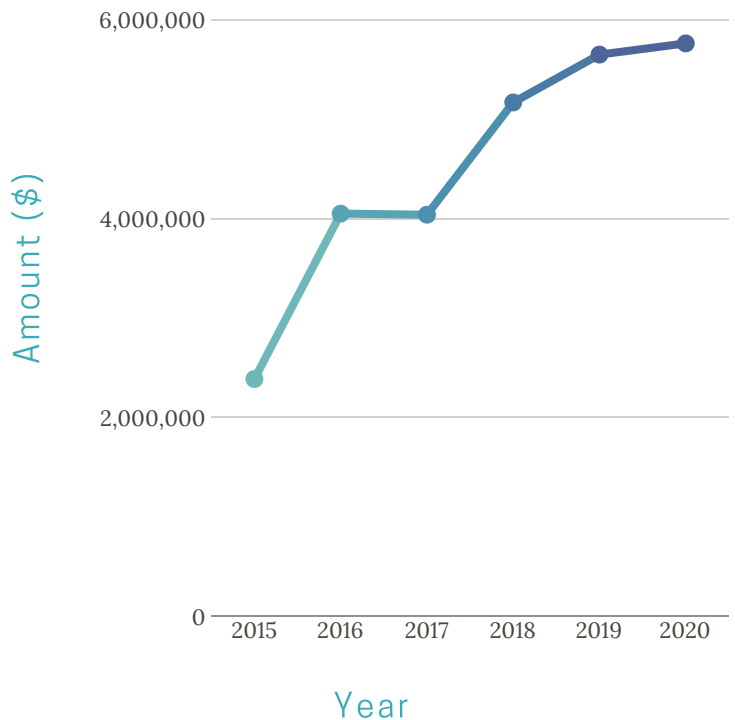
all donations made to date

Donors' grants to date



- **Arts, Music and Culture** (\$220,034)
- **Education** (\$345,950)
- **Community** (\$324,459)
- **Health + Social Services** (\$319,229)
- **Environment** (\$342,863)
- **Youth** (\$71,335)
- **Religion** (\$80,875)
- **International Development** (\$51,754)

Total donor funds



Our audited financial accounts can be found at www.thegifttrust.org.nz/about-us

Impartial advice to guide your giving

We have some great examples over the past year of providing genuinely impartial expert philanthropic advice for donors.

The Gift Trust has designed individual giving plans to make our donor's giving more focussed, effective and fun!

One family in Wellington asked us to research charities that took in the diverse interests of their 3 adult children. We looked into a wide range of causes including those working on freshwater conservation, mental health, climate change, musical therapy and with disadvantaged children. The family used the research to select 6 charities and donated \$40,000.

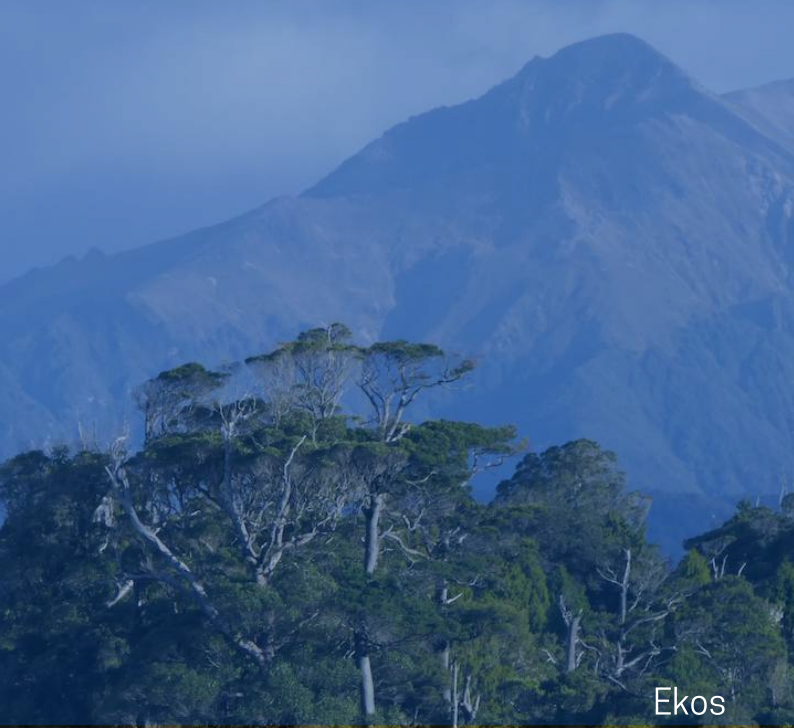
Another family wanted us to look into which Auckland charities were responding to the Covid-19 crisis with a particular focus on vulnerable children. They have now donated \$90,000 to 6 charities following the research we did.

"The Gift Trust does an incredible job of taking your ideas and interests and proposing charities ... it takes the guesswork out of philanthropy. It makes the process of doing good things with money completely stress free"
- Ben, Gift Trust Donor

Talk to us if you need some advice on your giving plans.

Donation Recipients

350 Aotearoa • Action Station • Arohanui Strings • Arthritis Foundation • Asia Harvest Trust • BGI - Te Kai a Te Rangatira Leadership • Birthing Centre Limited • Birthright • Blind Foundation • BSF • BWB Publishing Trust • Changemakers Refugee Forum • Common Unity • CQ Collective Intelligence • Denver Shambhala Centre • Ducks Unlimited • Earthcare Education Aotearoa • Ekos • Environment and Conservation Organisations NZ • Extinction Rebellion Otautahi • Fred Hollows Foundation • Generation Zero • Gillies McIndoe Research Institute • Globaia • Hamilton Christian Night Shelter • Hillary Institute of International Leadership • House of Science NZ • Humanitix New Zealand Charitable Trust • Inside Out • Kaibosh • Kidscan • Koanga Institute • Lifeline Aotearoa • Lifewise • Manaiakalani Education Trust • Mary Potter Hospice • Miracle Feet • Motueka Rudolf Steiner School • Multicultural NZ • Naenae Youth Charitable Trust • OMF Homeside Trust • OMF New Zealand • Oxfam • Papakura Kootuitui Trust • Peoples Project • Prince's Trust New Zealand • Red Cross NZ • Rigdzin Bum Tsog Trust • Rites of Passage • Roimata Food Commons • Seed the Change | He Kākano Hāpai • Seychelles Island Foundation • Shakti Community Council • Space Base • Student Volunteer Army • Tasman Bay Guardians • The Christchurch Aunties • Thinking Matters NZ Foundation • Virtuoso Strings • Wai NZ/ River Watch • Waiheke Island Rudolf Steiner Education Trust (Fossil Bay School) • Wangapeka Study and Retreat Centre • Wellington Cathedral St Paul • Wellington Shambhala Centre • Women's Refuge New Zealand • World Vision • YIP - International Youth Initiative Programme



Growing green giving

During the past year, our donors decided to give 33% of their total donations to environmental causes. These included support for:

- Environmental education and umbrella organisations Earthcare Education Aotearoa and ECO (Environment and Conservation Organisations NZ)
- Biodiversity with Duck's Unlimited who led the Wairio Wetland Restoration project in the Wairarapa
- Water preservation at Wai NZ/ River watch
- Climate change organisations 350 Aotearoa, Extinction Rebellion and Generation Zero
- Land protection with Ekos, protecting Māori owned indigenous rainforest, like Rarakau forest mountains, through supplying carbon offsets.

During the year, an Environmental Funding Report by Philanthropy New Zealand showed just four per cent of philanthropic and grant maker funds were directed to environmental causes, so we are proud our donors are bucking this trend!

If you want to grow your green giving, get in touch to see how we can help.

Six ways to achieve more with your giving

Here are some ideas to make your donations accomplish even more.

- Offer unrestricted funding and let the charity choose where it goes. It can be challenging to raise money for essential needs such as office space, or salaries - so let them decide.
- Commit to fund your charity over a number of years. This allows them to plan ahead with some security and get on with their work, instead of constant fundraising!
- Build their capacity by providing funding for staff, volunteers or board to learn new skills and grow. It can be a game-changer!
- Be their voice by shining a spotlight on the organisations. Tell family and friends, introduce other donors, write to the paper, blog, tweet and share.
- Volunteer your time to learn the gaps and needs in the causes you care about.
- Claim your donation rebate and give up to 50% more to the charities you care about, at no extra cost to you.



Donating via the United States

This year, we have set up an account with US donor-advised fund RSF Social Finance to allow US based donors to contribute to charitable causes in New Zealand via The Gift Trust.

Donations can be made in cash, shares, or securities and enables the donor to receive a US tax benefit.

Any donations received to the "Friends of The Gift Trust NZ" account held at RSF will receive a US tax receipt and will be transferred to The Gift Trust to be allocated for the purposes that the donor specifies.

The fund can be used by US donors who want to support any NZ charity, or for those who want to donate into a Gift Trust account.

If you'd like to find out more about donating via the United States, contact us to talk further.

You can make more good happen through The Gift Trust

The world is home to lots of organisations who are doing amazing things in their communities and environments. Just as importantly, it's home to people who can enable these heroes to do more good, by providing the money they need.

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

At The Gift Trust our purpose is to simplify generosity, to make more good happen.

We talk to you about your values and dreams for the world, identify effective organisations and then monitor progress, to ensure your gift truly is making good happen. We connect your giving with those organisations who are making a difference on the ground, in the areas you care most about.

It's personalised giving made easy, so that you can give with greater confidence and deeper effect. If you're an individual, family or business with \$5,000 to over \$1million to give, and want to make sure it goes into the hands that will use it well, talk to us today.

Together, we'll make good happen

**Get in touch to learn more
about our Gift Accounts**



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