



**THE COMMUNITY FOUNDATION**  
HAWKE'S BAY

*A lasting way to better  
your community*

**Keeping it in Hawke's Bay**

A CHARITABLE TRUST REGISTERED TO ENCOURAGE LOCAL GIVING FOR LASTING VALUE

*This booklet has been prepared  
for you to share personally in  
our ambition for the province.*

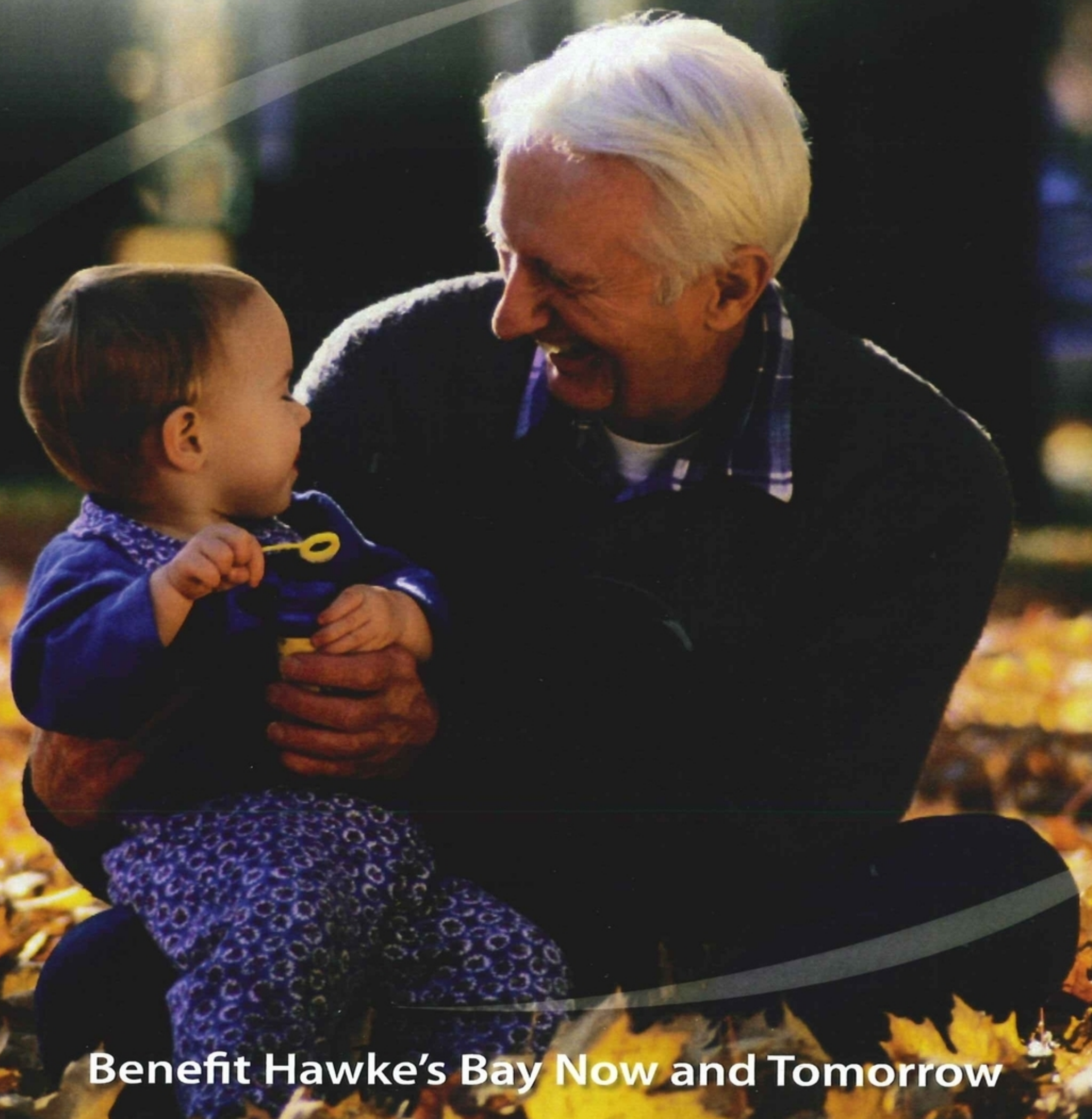
*We hope that after reading this  
we can involve you in a vision that  
has long lasting benefits*



# *Give where you live*

**The Community Foundation (HB) is an independent, volunteer driven, charitable organisation working to strengthen the community.**

The foundation enables people to join the growth and development of Hawke's Bay as donors or volunteers. The foundation builds assets and resources that will benefit the province for generations to come. You can have a say in this.



**Benefit Hawke's Bay Now and Tomorrow**

# *Why a community foundation?*

Community foundations are one of the fastest growing forms of philanthropy worldwide.

The Community Foundation (HB) is a forerunner in this country.

More than 600 community foundations in the United States now have at least \$70-billion in permanent endowment assets.

There are 120 foundations in Canada.

In the United Kingdom there are more than 95 foundations monitoring \$350-million in endowments. In Australia there are 30 foundations.

Here in New Zealand, a website is being established right now to introduce you to New Zealand counterparts.



*The Hawke's Bay foundation is recognised by Philanthropy New Zealand and Philanthropy Australia. The foundation is affiliated to Wings, the Worldwide Initiative for Grantmaker Support*

**Leave a legacy :  
There is no end to the good you can do**

## *We all benefit*

The role of the Community Foundation (HB) is to identify needs in the region and target them with project-based funding, guidance or mentoring.

Some projects are long-term, others are for now.

The foundation is a registered non-profit charitable organisation. It has tax-exempt status. There are no political, religious or cultural affiliations. No directors' fees are paid; the trustees provide their time and expertise free of charge. Each of the trustees is required to be a donor.

The Community Foundation (HB) has minimal overheads and works with both public and private providers to achieve results.



**Our vision:  
to create a vibrant and caring community**

## *The concept is simple*



**With your help, The Community Foundation (HB) will build a substantial amount of money from the contributions of people of both significant wealth and modest means.**

The foundation uses income from these funds as community investments (grants).

That way it meets the community's charitable needs and opportunities now and into the future.

The foundation achieves this without unseemly portions of your giving going to professional fundraisers or to causes outside the province.

The foundation aims to establish a self-sustaining source of administrative funding so that the gifts of the province's people will be steered in their entirety to the causes of their choice.

**Make a lasting difference, here in Hawke's Bay**

*You, too,  
can make a difference*

Money given to the foundation to

benefit Hawke's Bay can be

*an endowment to meet*

*the aspirations of the*

*community now and in*

*later years*

or

*passed through to*

*meet current needs.*

**Between  
\$300,000 and  
\$400,000 has  
passed into  
community  
hands to date**

## It's your choice!

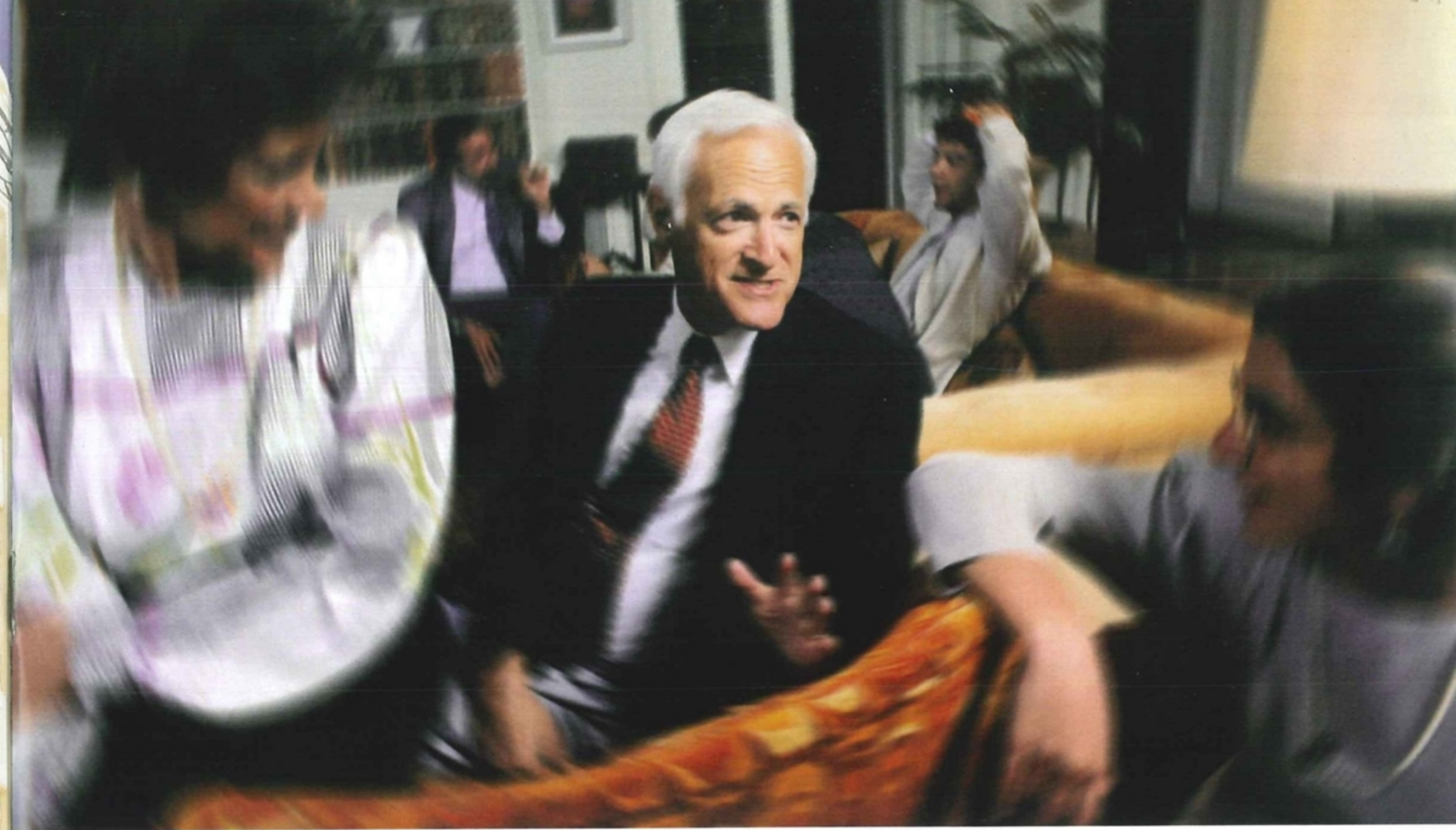
Whatever your wish, your gift will be managed through time to ensure that your intent is achieved. Our principal objective is to provide a simple, effective and long-lasting opportunity for individuals, families and companies to contribute to local causes without hassle.

### The choices are:

- You can build a permanent legacy. This **named endowment fund** is a lasting memorial to you and your family.
- You can choose a **field of interest** where the fund you establish benefits an area of your specific interest such as the arts, education, health, environment, employment, social services, youth or elderly.
- We can help you establish an **advised fund**, where you or your company make contributions at any time and advise the foundation on grants to be made from the fund. The choice of charities may vary according to your wish.
- Another option is a **designated fund** whereby you specify a community organisation that is to benefit.
- You can choose a **project fund** – established for specific community work.
- Similarly, there's a scholarship fund – for education and skill development.
- Or you can make an **unrestricted grant**, the most flexible.



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All of your contribution can be allocated or you can decide that only the interest be used.

An unrestricted grant allows the foundation to address changing and sometimes unforeseen community needs.

Unrestricted grants can be pooled at times with accumulations from other people's contributions, creating a larger pool for a larger project.

A Named Endowment Fund, managed by The Community Foundation (HB), has advantages over a separately created private charitable trust. It provides enduring trusteeship. Many private charitable trusts have the donor and appropriate professionals as trustees – but there is rarely adequate provision for replacement of those trustees when the initial trustees retire or die.

In the long term a single trust is expensive to manage properly. It is cost effective where a number of Named Endowment Funds is being managed under one roof.

You may place restrictions on a designated fund such as a specific time frame. In this case, provision is necessary for reversion to another field of interest if the organisation ceases to exist.





# Who controls the foundation?

The Board of Trustees of the Community Foundation (HB) contains a mix of commercial skills, expertise and experience in the public sector, community knowledge and public profile.

We use advisers and make informed choices about how to invest funds both for growth and for impact in the community. The advantages are local knowledge, continuity and fund administration – without the percentage takers.

**The chairman is Mr Peter Dunkerley**, born and educated in the UK. Peter arrived in New Zealand in 1967 as part a world trip – and overstayed. It was too enjoyable living in a kinder climate and a beautiful country. Forty years later, there is no looking back. His experience ranges from managing a large pharmacy company to the luckiest Lotto shop in New Zealand. He is the highest-polling elected member of the district health board. He has had a long involvement with the Hawke's Bay Rescue Helicopter Trust.



## ***The board comprises at least:***

- One appointment each by the mayors of the Hastings District Council, the Napier City Council and Central Hawke's Bay District Council.
- One chartered accountant.
- One member of the legal profession.
- Other members, appointed by the board in accordance with a constitution.

## Current board members:

**David William Sabiston**, who graduated with a MB.ChB in 1956. He was registered on the New Zealand Medical Council in 1957 and spent two years as a house surgeon and one year as surgical registrar at Napier Hospital. His qualifications increased over the years and he has carried out private practice in Napier for 35 years, occasionally spending time on lecturing and locum work. One of his tasks was as ophthalmologist, appointed to the Sydney Olympic Games in 2000. He has performed presidential duties for Napier community and sporting groups. He has written scientific articles.

**Diana Mary Petersen**, MNZM, JP, from Waipukurau, holds many positions in Central Hawke's Bay. She was awarded the New Zealand Order of Merit in 2003, has been a JP since 1985, a Marriage Celebrant since 1986. She is a Rotary Paul Harris fellow. Diana was previously a CHB District councillor, a trustee of Sport HB, and president of the Hawke's Bay JP Association.

**Mark von Dadelszen**, LL.B, has been at Bannister & von Dadelszen, Hastings, since 1972, and after experience in most areas of legal practice in recent years has specialised in dispute resolution and litigation, resource management and local government law. He has appeared in most courts, including the Privy Council. He has a special interest in the law of societies and charitable trusts. He has served on the Hawke's Bay Regional Development Council, Havelock North Borough Council, Hastings and Districts Chamber of Commerce, Havelock North Community Centre Trust, Whakatu Afforestation Trust, Spirit of Adventure Trust and Toastmasters.

**James Morgan**, well versed in community service. Retired newspaper editor, farmer, forester and administrator. Life member Hastings Group Theatre; producer Napier Operatic Society; director Hastings-Guilin Sister City Board; founder-chairman Flaxmere Licensing Trust 1975-90; foundation director Trust House Ltd; national administrator NZ Sister City Board 2000-2002.

**Alison (Ali) McCarthy**, has lived in Napier for 25 years. Previously, she lived and worked in England, Australia and South Africa, mainly as a nurse and business representative. In Napier she ran her own promotion business and for many years has run a mobility products business. She has served on the Napier Central School Committee, is a past president Pania Toastmasters; she chairs a committee for Altrusa International Club of Taradale and Napier, and is also a board member.



One role we have  
is in an advisory/fund manager  
capacity in Hawke's Bay for the Tindall Foundation, by  
far the nation's largest philanthropical organisation



## *The new giving*

**Imagine what would happen if every couple in Hawke's Bay bequeathed 10 per cent of their estate to the province....**

Here is a hypothetical example:

Say 10,000 couples followed their instinct to make a contribution to their community, perhaps by way of a named endowment fund. Say each of these estates was valued at \$250,000 and the couples decided to leave 90 per cent to their children and 10 per cent for the good of the community. That's \$225,000 for the family and \$25,000 as their memorial.

Assume 200 of these bequests fall due each year. That's a contribution of \$5-million a year for the good of Hawke's Bay. Over 50 years under this equation, 10,000 couples who are alive today will have contributed \$250-million to their community.

***Call us today. We'll help you be part of this thinking.***

# *There are winners everywhere*

**The Community Foundation (HB) is a philanthropic non-profit trust which enables everyone to win: the donor, the recipient, the community at large.**

Some projects need time, funding and resources to be effective. Others can be funded immediately, meaning the workers in those organisations can focus on their real objectives while the community foundation absorbs some of the time it takes for them to raise funds and manage endowments.

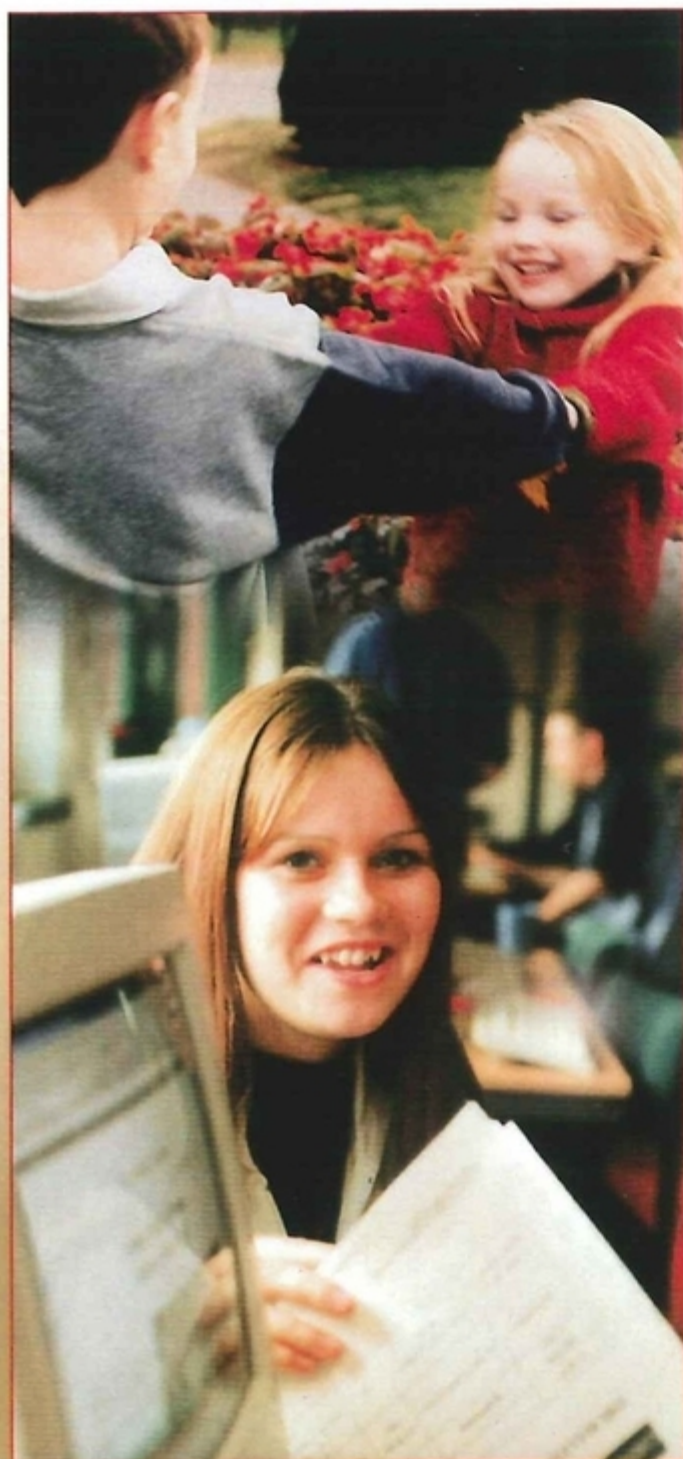
The community benefits from a greater and sustained level of fundraising in an era when governmental funding is shrinking.

Donors win because they are able to have a say in the use of their gifts while resting comfortably in the knowledge that the funds are under effective stewardship.



# *What do we promise?*

- To make informed choices when making grants.
- To invest your gift prudently by using reputable investment advisers.
- To distribute your gift or the proceeds from it to the charity of choice (if you request this).
- To ensure your gift benefits Hawke's Bay and its charities directly.
- Permanence and accountability.
- No profit takers.



## *Special Note:*

The Community Foundation (HB) has its genesis in its predecessors, Transfusion Foundation and the Hawke's Bay Health Trust. The board of The Community Foundation (HB) acknowledges the support and encouragement it has had on the path to the present important structure.

As much as anything, the name change to The Community Foundation (HB) is to identify better the foundation's purpose and the significant legal and structural progress that has taken place since mid-2005.

**Need a speaker for  
your group?**

**Contact Tony Bryan**

**on 870 4648 or**

**[tony@thefoundation.co.nz](mailto:tony@thefoundation.co.nz)**



**It is every man's obligation to put back into the world  
at least the equivalent of what he takes out of it**

*- Albert Einstein*

# *Contributors already supporting a better Hawke's Bay*

The following groups and individuals are  
acknowledged contributors to the work or  
projects of The Community Foundation (HB):

**Adrienne Williams**

**Alison McCarthy**

**Bannister and von Dadelszen**

**Bryan & Anne Hutchinson**

**Centracorp Finance**

**Chris Tremain**

**Craig Foss**

**David Bone Landscaping**

**David Sabiston**

**Department of Corrections**

**Diana Petersen**

**Flaxmere Licensing Trust**

**Guardian Trust**

**Hastings District Council**

**HB District Health Board**

**Herbert Construction**

**Hospital staff & volunteers**

**James & Leith Morgan**

**John & Rowena Bradshaw**

**Lions Club of Hastings**

**Lion Foundation**

**Lowe Walker Helicopter Foundation**

**Mark von Dadelszen**

**Morgan Builders**

**Mullany Transport**

**Pelorous Trust**

**Peter Dunkerley**

**Pub Charity**

**Skelton Ivory**

**Southern Cross Building Society**

**0800 Sunshade Ltd**

**Tamatea Women's Institute**

**Tindall Foundation**

**Vernon King Associates**



*Local giving  
for lasting value*



The purpose of The Community  
Foundation (HB) is to build substantial  
funding through endowments and gifts.

Where appropriate the funds are used  
on large-scale province-wide projects;  
simultaneously there is (and already has  
been) recognition of smaller communities  
in our midst which have needs but not  
resources.



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