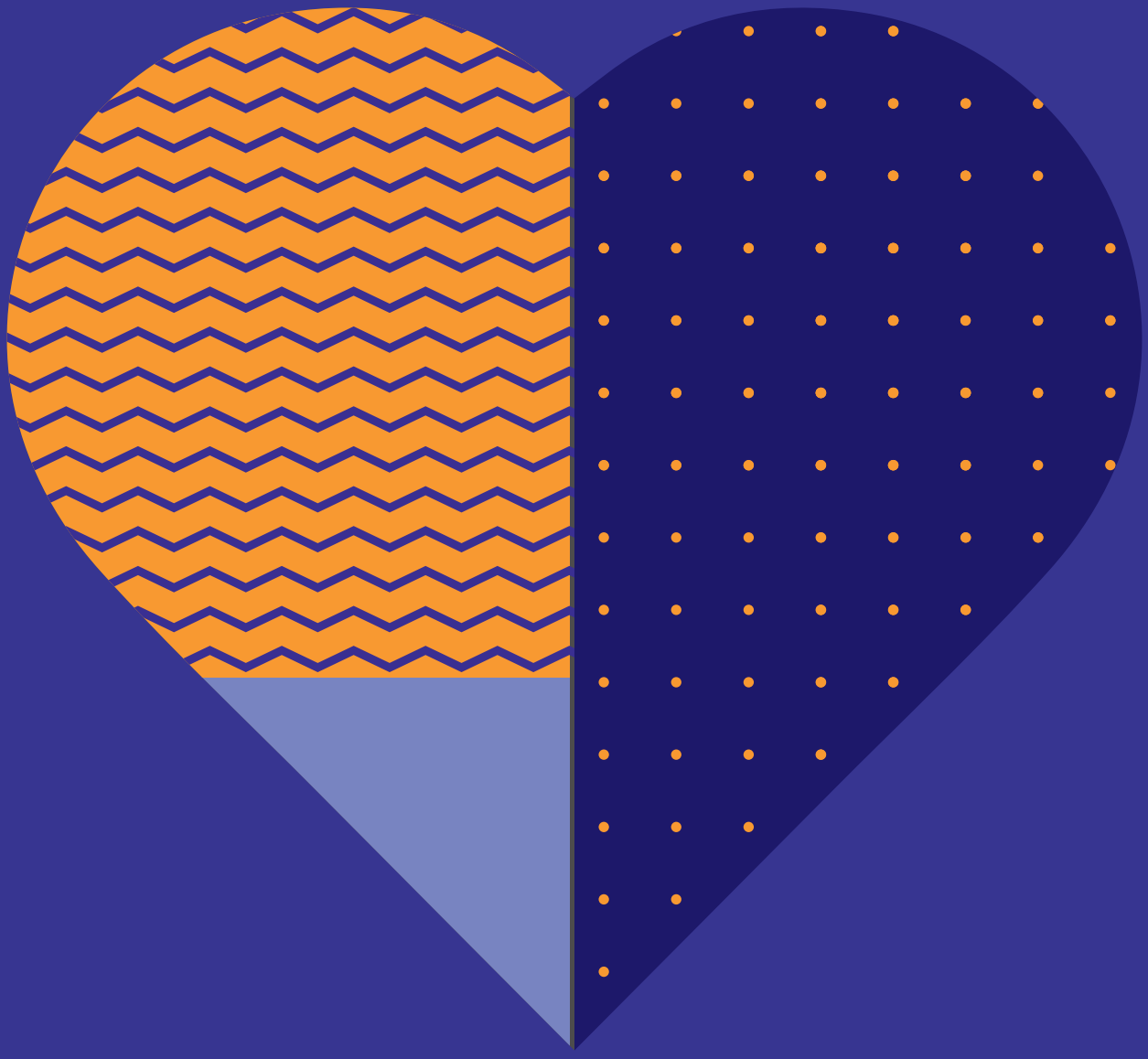
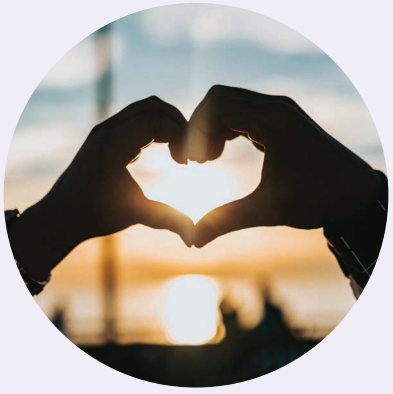


We love where we live.

Ka aroha tātou I tō tātou whenua noho.

GEYSER COMMUNITY FOUNDATION

Our region's Community Foundation



Community Foundations provide a smarter way to give to the community you love.

We can invest and grow your donations so the interest they earn can benefit your chosen local causes year on year, forever.

Our Vision

Growth through giving.

Our Mission

To connect people with charitable causes through giving that lasts forever.

This annual report has been produced with the generous support of:

DJ creative

Advocateprint
BE RECOGNISED IN COLOUR

Brendan O'Brien
PHOTOGRAPHY

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Make your giving go further

Greetings / Tena Koutou

We love where we live. That's why we're here. We are all about forever funding and we are in this for the long haul. We're delighted to report that this financial year has been an exceptionally good one, which brought about a good reserve for many of our funds. But we cannot expect this to be consistent. We still have a long way to go and there is still so much more to do.

Thanks to the continued and very generous support of our wonderful donors and other big-hearted people in our local communities, we continue to make good progress. We now have a total of 84 Named Funds; funds under management has increased to $7.9 million, an increase of $2.6 million over the past 12 months due in part to receiving the largest Fund in Geyser's history to date: the Peter, Joan and Kay Dean Fund, which will benefit the Reporoa community year on year, forever. A significant achievement for all concerned. In addition, the value of gifts anticipated in people's wills has climbed to an estimated $15 million.

As many of you know, our investments have been professionally managed by Craigs Investment Partners since Geyser first began back in 2007. Craigs has served us well over a long period and continue to support Community Foundations at a national level. However, having completed an extensive investment review during the year, Trustees agreed to move to Cambridge Partners. The transition was completed by 31 March 2021, and we look forward to a long and mutually rewarding partnership with Cambridge Partners.

Community Foundations are still the most valuable way for individuals, families and organisations to support their local communities. We are different because we're not about one single cause; we're about a place and its people. We pride ourselves on being able to connect generous local people with local causes that matter. We are unique and can be proud that we are part of the original and most experienced place-based funding network in the world.

People are incredibly important to Geyser and in July 2020, we were delighted that the Foundation's inaugural Chairman, Joe La Grouw agreed to become our inaugural Patron. The role is honorary, and we are very grateful that Joe has made this generous commitment as he brings a great deal of business and governance experience to the position. We have appreciated his wise counsel during the year.

We would like to thank the Board for their support, commitment and hard work, and to welcome new Trustees, Alan Wills and Jan Bolton. We thank Fraser McKenzie, Jennifer Mayer and Ryan Holmes who left Geyser during the year, for their contributions over many years. Today, our team comprises of more than 30 committed and dedicated local people. All of whom are appointed and volunteer their time.

In October, Vicky Powell joined our management team. Staff are paid and work over and above their duties to ensure the office runs smoothly and donors' wishes are carried out as intended.

From now until the time we become self-supporting we continue to face the challenge of meeting our operating costs and rely on the generosity of funding bodies as well as generating our own income. We are grateful for the ongoing financial support from our major partner, Rotorua Trust and to Nairn Fisher for providing us with a rent-free office. We continue to work closely with our friends at The Tindall Foundation and Community Foundations of New Zealand (CFNZ).

We're part of a network of Community Foundations that have been growing around Aotearoa New Zealand since 2003. But the concept of pooling and investing charitable donations for the good of a local area has been a growing global movement for over 100 years now. It works for everyday people because you don't have to be wealthy to have an impact; all giving makes a difference through our smarter giving model.

We love where we live. And we know there are lots of other caring Kiwis just like us, passionate about transforming their communities. **That's why we're here.**

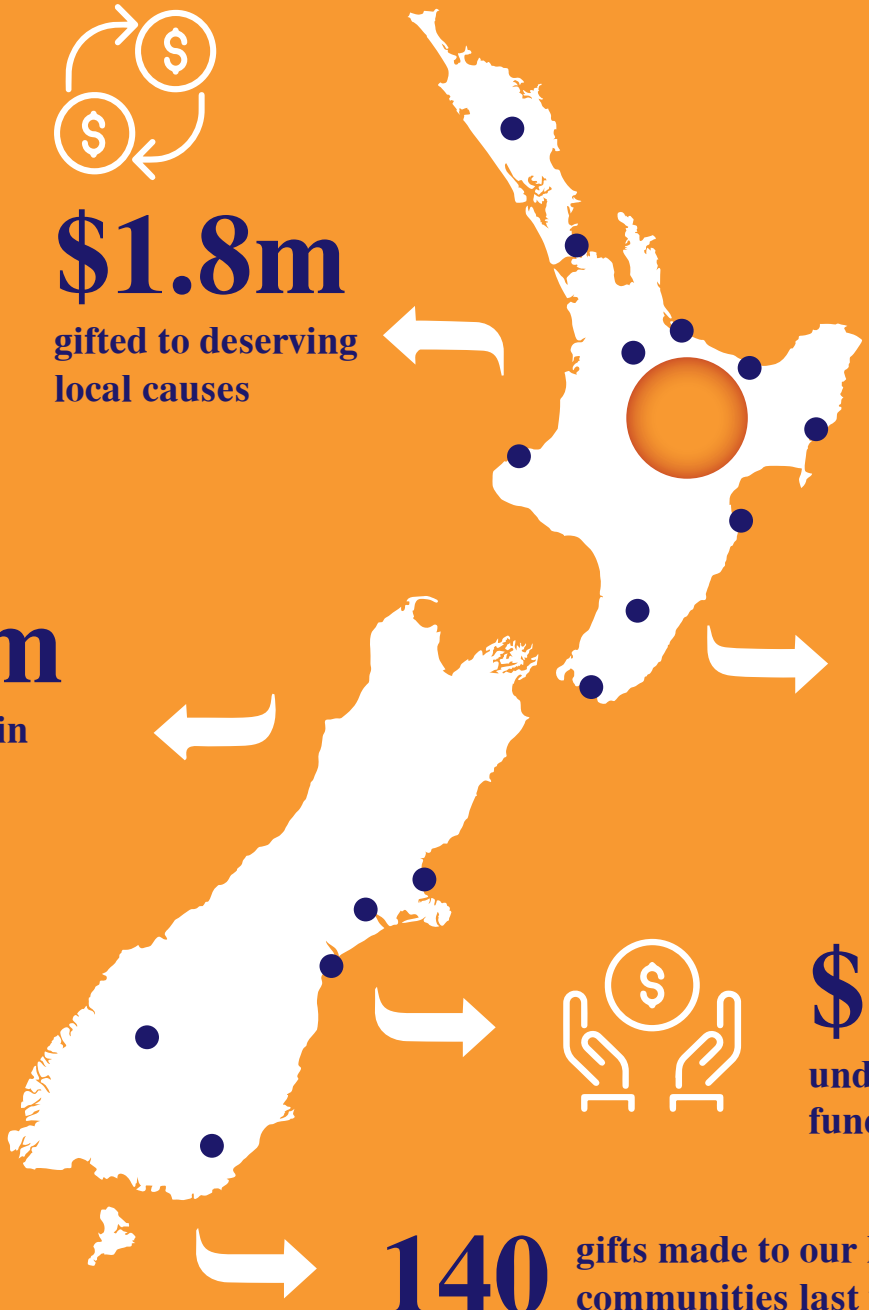
Kierin Irvine
Chairman

Annette Burgess
Executive Officer

How far have we come in the Central North Island?

$1.8m
gifted to deserving local causes

$15m
anticipated in wills so far



1.3
full time staff
Supported by 30+ local volunteers

$7.9m
under managed funds

140 gifts made to our local communities last year

Copies of the financial statements are available on request.

People who care

Every year a growing number of local people partner with Geyser and establish new Named Funds or add to existing ones.

We are grateful to the following people who have made a planned gift through the Foundation:

- Anonymous (10)
- Anaru, Pita
- Bannan and Jago, Ken and Penny
- Bay of Plenty and Waikato Rural Support Trusts (Combined)
- Bentley, Peter and Maggie
- Big Brothers Big Sisters Rotorua
- Bohm, Barbara
- Bolton, Jan
- Brewster, Roger and Elaine
- Bright and Gray, Jeanne and Mike
- Brown, Pat and Hilary
- Burgess and Campbell, Annette and Jamie
- Brynes, Ann and Chris
- Chadwick, Steve
- Cockburn, Colin
- Cumming, Barbara and Fergus
- Peter, Joan & Kay Dean Reporoa Educational Trust
- Dementia Lakes
- Evans, Howard and Lynare
- Fergusson, Terry
- Gibson, Murray
- Griffin, Roberta and Enid
- Grumitt, Shirley and Barbara
- Harold Holmes Trust
- Holmes, Warrick and Betty
- Hunt, Karen and Greg
- Irvine, Kierin and Janette
- Irvine, Mary
- Ivory, Bernard
- Jamieson and Mitchell, Linzi and Peter
- John Paul College
- Kaharoa Kokako Trust
- Keaney, Judy
- Kermode, Bill and PF Olsen Limited
- Killerby, Paul
- La Grouw, Joe and Jo-Anne
- Legion of Frontiersmen H Troop Taupo
- Life Education Trust Rotorua
- McDonald, Colin and Jenny
- McEwan, Garry
- McKenzie, Fraser and Dorothy
- Millward, Sam
- Molloy, Gabby
- Moore, Patricia
- Mowbray, Robert and Jacqueline
- John Paul College
- O'Flaherty, Peter
- Patchell, Murray and Helen
- Pilaar, Elizabeth and Christian
- Phillips, Helene
- Porter and Pelham-Porter, David and Bernadine
- Potter, Shirley
- Prichard, Karen
- Richardson, Jody
- Rotary Clubs of Rotorua (Combined)
- Rotorua Boys' High School
- Rotorua Girls' High School
- Rotorua and Districts NZ Riding for the Disabled
- Rotorua Lakes Council
- Rotorua Women's Club
- Rotorua SPCA
- St Chad's Trust Rotorua
- St Faith's Church Ohinemutu
- Sewell, Allan and Jan
- Steele, Greg and Bridget
- Taupo nui-a-Tia College
- Tongariro Natural History Society
- Theron, Dr Margriet
- Waaka, Louise
- Wills, Alan and Alison

Community Funds

Our Community Funds represent donations from individuals, families and organisations who want to contribute towards a permanent legacy for the benefit of their community.

Thank you to the following Founding Donors who have committed $5,000 or more:

ROTORUA FUND

- BNZ Rotorua – Staff
- Chavasse, Shirley and Geoffrey
- La Grouw, Joe
- Low, Sheila and Jim
- Joseph, Chris and Lynne
- McKenzie, Fraser and Dorothy
- Patchell, Murray and Helen
- Rotorua Breath of Heaven Trust
- Rotorua Lakes Council
- Sewell, Allan and Jan
- Snyman, Ingrid and Jan

TAUPO FUND

- Beadle, Murray – BNZ Taupo
- Brown, Pat and Hilary
- Cooper Family Investments
- La Grouw, Joe
- Phillips, Helene
- Williamson-Orr, Joan

ARTS FUND

- Anonymous
- Roger and Elaine Brewster
- Shakespeare Outside

ENVIRONMENT FUND

- Shirley and Geoffrey Chavasse
- Mary Irvine

EDUCATION AND LEADERSHIP FUND

- The Laurie Coon Foundation

SPECIAL INTEREST FUNDS

- Bay of Plenty & Waikato Rural Support
- Big Brothers Big Sisters Rotorua
- Dementia Lakes
- Kaharoa Kokako Conservation
- Life Education Trust Rotorua
- Rotary Rotorua Hospice
- Rotorua & District Riding for Disabled
- Rotorua SPCA
- Rotorua Women's Club
- St Faith's Church Ohinemutu
- St Chad's Trust Rotorua
- Tongariro Memorial

ALUMNI FUNDS

- John Paul College Rotorua
- Rotorua Boys' High School
- Rotorua Girls' High School
- Taupo nui-a-Tia College

You can choose who, what and how your giving benefits.

Causes that matter

Geyser connects people who care with causes that matter.

Our smarter giving model sets us apart from other charities. With us, your generosity can have impact for many years.

2021 Gifts to the Community

Love

By Category

3% Arts

13% Community

22% Education

3% Conservation & Environment

59% Family / Whanau

By Community

2% Murupara / Kaingaroa

87% Rotorua

7% Taupo / Turangi

4% All NZ

Arts

Arts Fund	$ 2,000
Joe and Jo-Anne La Grouw Fund	$ 2,000
Michael Pilaar Memorial Music Fund	500
David Porter and Bernadine Pelham-Porter Fund	$ 4,000
	$8,500

Community

James Dodds Memorial Fund	$1,500
Roberta and Enid Griffin Fund	$ 8,500
Sam Millward Fund	$ 3,300
Rotorua Community Fund	$ 2,800
Rotorua Lakes Council Community Grants Fund	$ 7,500
Taupo Community Fund	$ 2,000
The Tindall Foundation Fund	$ 9,000
Wallace Trust Fund	$ 3,000
	$37,600

Education

Bannan Science Fund	$10,000
Beverley Anaru Memorial Scholarship Fund	$17,500
Grumitt Sisters Fund	$ 2,000
Harold Holmes Student Grant Fund	$ 1,000
Kaingaroa Roading Fund	$ 2,000
Karen and Greg Hunt Fund	$ 2,000
Life Education Trust Rotorua	$ 3,000
Michael Pilaar Memorial Music Fund	$ 1,500
Rotorua Community Fund	$ 5,200
Rotorua Lakes Council Community Grants Fund	$11,500
Speech New Zealand Fund	$ 1,220
Norman Steele Memorial Fund	$ 1,500
Taupo Community Fund	$ 1,000
The Tindall Foundation	$5,000
	$64,420

Environment & Conservation

Environment Fund	$ 5,000
Kaharoa Kokako Conservation Fund	$ 1,750
Taupo Community Fund	$ 3,000
	$ 9,750

Family / Whanau

Sam Millward Fund	$ 2,200
Ngatuku Farms Fund	$ 2,500
Rotorua Community Fund	$14,500
Rotorua Lakes Council Community Grants Fund	$72,500
Rotary Rotorua Hospice Fund	$ 3,000
Allan and Jan Sewell Family Fund	$20,000
Taupo Community Fund	$ 2,000
The Tindall Foundation Fund	$42,500
Wallace Trust Fund	$ 9,000
	$172,200

Total Gifted

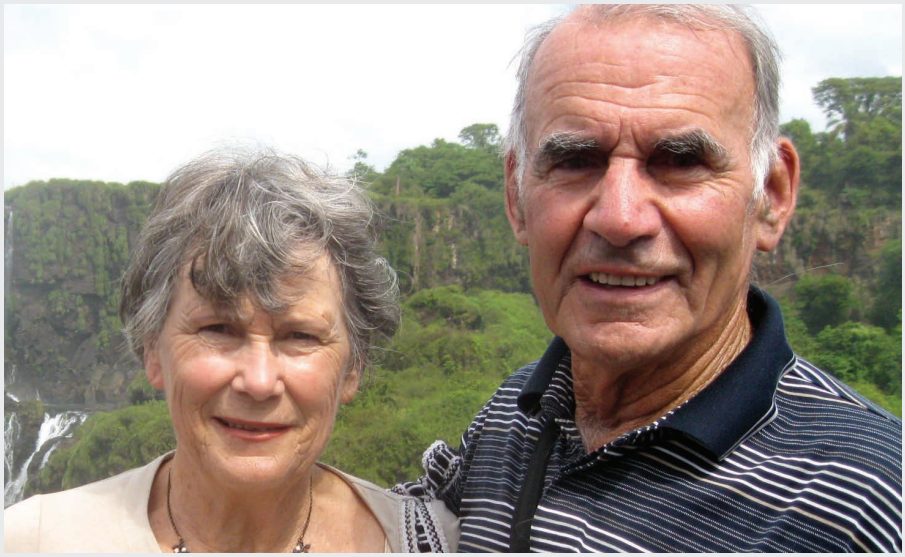
$295,470

Ann Nicholas
Chair, Distribution Advisory Committee

Our stories

Positively change your community forever.

Our people are very generous and are positively changing our communities forever. It is because of their generosity, Geyser is able to support such a wide range of charitable initiatives, programmes and groups in the Rotorua and Taupo District communities – and beyond. Their stories will inspire you.



The 'city boy' leaving a rural legacy

Fraser McKenzie determined from the age of 10 that he wanted to be a dairy farmer, despite not growing up on a farm. The 'city boy" attended Massey University and worked on farms from a young age, eventually buying a block of land at Ngakuru, south of Rotorua, which he and his wife Dorothy have now farmed for over 60 years.

Fraser also became involved at a much wider level in the farming sector, elected to the Bay of Plenty Harbour Board in 1974, becoming chairman in 1983 and chairman of the Harbours Association of New Zealand three years later. He became foundation chairman for Port of Tauranga Ltd, retiring after 30 years of service.

Dorothy and Fraser heard about Geyser Community Foundation and really liked the idea of giving back in perpetuity. They had got to the stage where they realised they had more than they need, and will probably be in a position to leave their children more than they need, so why not support the local community through Geyser, which helps others in need?

They began by contributing to the operating costs at Geyser, in its early days as a fledgling Foundation. Over time, they also contributed to some of Geyser's Named Funds, one to support speech therapy and another supporting migrants, as well as donating to the Rotorua Community Fund. From there, they helped set up the Waikato and Bay of Plenty Rural Support Fund, providing the seed capital for the Fund to get it started. It's a Fund which will support farmers in need.

Dorothy and Fraser have also made provision in their wills to leave a gift to Geyser, to safeguard the Rural Support Fund, supporting the local farming community forever.

They like the idea of the Community Foundation's sustainable business model, and that you don't have to be wealthy to contribute; everyone can donate. Dorothy and Fraser know there are people in the farming community who don't have relatives or kids that they can leave their property to - there's a great example in the South Island of farming brothers who are leaving their farm to their local community – and there is so much potential in New Zealand for people to do this. But people don't have to wait, they can give now– anything they like and the great thing is that it will be invested and will give back forever.

Why do Dorothy and Fraser do it? They say giving makes them feel good. They believe they have been very lucky, that life has worked out ok for them. But they know there are lots of people who are struggling and need support. Not everyone has the same fortune in life, and Fraser and Dorothy are happy to help where they can. They feel very lucky to be able to give back to their local community in this way.

Centenary celebration

Joan and Peter Dean

Kay Dean and boyfriend Jurg Meir

A wonderful legacy for local women

Women and women's groups in the Rotorua District community will benefit from the new Rotorua Women's Club Fund established with the Geyser Community Foundation.

Established in 1919, the Rotorua Women's Club was actively involved with the community and worked with the Red Cross and the Salvation Army for the service men and women who returned from WW1. Later, after buying their own clubrooms in Hinemaru Street, the Club became a hub of social activities for the women of Rotorua.

In 2019, the Club celebrated its centenary with some members being the second or third generation enjoying the benefits of memership. Having been active for 101 years, members decided that the time had come to close the doors. The clubrooms were sold and the legacy passed to Geyser to manage. Their Fund will benefit future generations of women in the Rotorua District year on year, forever.

Celebrating life: a local family's legacy

On November 28th 1979 an Air New Zealand DC10 carrying 257 passengers and crew on a sightseeing trip to Antarctica were killed instantly when the aircraft collided with Mt Erebus. It was unknown to the crew that Flight TE 901 had been loaded with an incorrect flight path. In the whiteout conditions that prevailed at the time, the result was inevitable.

On board that flight was one of our community's own, Kay Dean, the daughter and only child of Reporoa farmers, Peter and Joan Dean. She was accompanied on the flight by her Swiss boyfriend Jurg Meir. At the time of her death, Kay was 22 years of age, had just finished her law degree and was involved in the NZ Territorials. She was also well through her training to gain a commercial pilot license. There is some speculation that the Erebus Flight may have been the occasion for Jurg to propose to Kay. The Swiss embassy confirmed a ring was found in Jurg's clothing when his body was recovered. Today, you can find Jurg and Kay at rest together under a Copper Beech tree in the grounds of Reporoa College.

Back in the mid-1950s, Peter and Joan Dean drew a civilian ballot dairy farm in the Broadlands region of south Reporoa. Joan was a trained secondary school teacher and took employment as a Science and Math teacher when the Reporoa District High School started in 1956. Subsequently the District High School became Reporoa College in 1966. The Dean's continued farming their original Broadlands property until Peter died in 2012 and the farm was sold. Joan continued to live in their original farm house until she died in December of 2017. For Peter and Joan the impact of losing their only child and daughter was horrific. They were, of course, well supported by the Reporoa community and in time made a life mission of helping and supporting other people and in particular the youth of the Reporoa Valley.

As a consequence of the tragedy and to honour Kay, Peter and Joan established a trust, 'The Reporoa College Educational Trust', sometimes also known as 'The Kay Dean Trust.' Prior to her death Kay had encouraged her parents to make an investment into forestry, so to honour Kay, they did just that by purchasing a 108 ha block on the Napier/Taupo highway. The block was fondly named Kay's Forest and still retains that name today. More than 50 ha was planted in plantation Radiata Pine with the balance remaining in native bush. In 2011, having taken a harvest from the block, it was replanted and then gifted to the Educational Trust. The next harvest is likely to be about 2030. Following the sale of the family farm, a legacy from Peter and Joan's estate was received in 2020. Today, the Trust is known as the Peter, Joan and Kay Dean Reporoa Educational Trust Fund, and is proudly managed by the Geyser Community Foundation. The interest from the Fund will benefit the Reporoa community year on year, forever.

When you're ready, here's how we can help you:

- Determine what you most love and care about in your community, and show how you could support and impact causes that matter to you.
- Provide information on giving strategies.
- Connect you with local causes, programmes or charities doing good work in your community.
- Tailor a plan of how you would like your money to be used.
- Simplify the process by managing all admin, investments and distributing the income – you get to say where your gift goes, which is the best bit!

Your gift. Your say.

We have different ways you can give and donations of any size are welcome.

Our supporters

One of the important aspects of being a Community Foundation is that we charge no more than 2% annually of the total capital value of Donors' Named Funds. While ensuring maximum returns to the community, this low funding model presents us with a very real challenge until we grow large enough to be self-supporting.

That's why we are so grateful to the local business and community leaders who help us in a number of ways, including providing valuable funds and professional services at little or no cost so that we can continue to operate and help build our local communities to be the best that they can be.

Brown Family Trust
Kierin Irvine
Joe La Grouw
Margriet Theron

Our team

Joe La Grouw CFNZ

Trustees and Management Team

Geyser's Patron, Trustees and Committee Members' generously volunteer their time and energy. All are appointed. Each member of our team brings distinctive traits and skills providing diverse and representative leadership to support Geyser's mission of inspiring individuals, families and groups to give back to our local communities and in doing so, improve a quality of life for all who live in the Central North Island.

OUR PATRON

Joe La Grouw MNZM

TRUSTEES & MANAGEMENT TEAM

Back

Alan Wills, Don Stewart, Kierin Irvine (Chairman), Chris Spargo, Vicky Powell (Executive Assistant)

Front

Mary-Robyn Clement, Helene Phillips (Deputy Chair), Ann Nicholas, Annette Burgess (Executive Officer), Jan Bolton

TRUSTEES WHO RETIRED DURING THE YEAR

Ryan Holmes
Jennifer Mayer QSM
Fraser McKenzie MNZM JP

We make it easy for you to impact the community you love, now and forever.

Donate today at

www.geysercf.org.nz

That’s why we’re here.

Ano te pūtake o tātou e ora ai.

www.geysercf.org.nz