October 2024

Forsyth Barr in the Community



FORSYTH BARR

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Front cover: The late Kiingi Tuheitia viewing the Forsyth Barr People's Choice Award winning artwork by Ani Ligaliga titled *"Lines of whakapapa"*. The People's Choice Award gave visitors the opportunity to vote for their favourite mahi toi (artwork) in the Kiingi Tuheitia Portraiture Award 2023 exhibition. Photo courtesy of Moments Productions.

Forsyth Barr and The New Zealand Portrait Gallery join together in acknowledging the passing of Kiingi Tuheitia Pootatau Te Wherowhero VII and welcoming Kuini Nga wai hono i te po Pootatau Te Wherowhero VIII.

Our Role

Forsyth Barr is a proudly New Zealand owned business. We started life in Dunedin in 1936, and now have 25 offices across New Zealand employing over 600 people. Given this, we believe we have both an opportunity and a responsibility.

The past 12 months have presented some deep challenges for New Zealand broadly, but for the charity sector in particular. Quite reasonably, as things get tougher for people they are less able to support charitable and community organisations.

A business is no different, and so times of challenge present a test of your principles. We talk proudly of the many organisations we support across the country – the schools, clubs and community organisations that rely on the help of others to be able to do their work. We embrace our responsibility to these organisations, appreciating that because of the support of our clients and the hard work of our people, we are a successful business.

So while the last period has been challenging for everyone, we are proud of the fact that we have not reduced the level of community support we have delivered.

On the following pages you'll find a summary of the many organisations we have supported in the past year. You'll find more detailed descriptions of three of our key partnerships, but we would like to particularly highlight one. It's the remarkable story of Terry and Tanya Long, who have turned the tragic loss of their daughter, Melanie, into an inspiring legacy, supporting countless kids in the Taranaki through the Mellowpuff Trust. (You'll find the story on page 10.)

Finally, thank you to our clients, whose support of Forsyth Barr enables us to in turn support these kinds of organisations. And thanks to all the people and community groups we have featured here, for the indispensable work you do for New Zealand.

Yours sincerely,



David Kirk мве, Chairman



Neil Paviour-Smith, Managing Director

Community Support

Three organisations we support that we profile in this review.







Advance Ashburton Community Foundation Akaroa Golf Club Inc Alexandra Bowling Club Alpine Energy Soap Box Derby Altrusa International Inc of Queenstown Andersons Bay Basketball Club Inc Aoraki Foundation Aoraki Mackenzie International Starlight Conference Aotearoa Impact Ecosytem Trust Arrowtown Bowling Club Inc Arrowtown Golf Club Inc Arts Council Nelson - Clay Week Ashburton A&P Show Ashburton Art Gallery Ashburton Golf Club Inc Auckland Regional Chamber of Commerce Basketball Otago Bay of Plenty Federated Farmers Beef & Lamb New Zealand Ltd Belleknowes Golf Club Inc Big Brothers Big Sisters of Nelson Big Buddy Golf Fundraiser **Brain Research Trust** Business East Tāmaki **Business South Incorporated** Cambridge Autumn Festival Cambridge Chamber of Commerce Cambridge Golf Club Inc Campbells Bay Tennis Club Inc Cancer Society of NZ Inc Cancer Society of NZ Inc (Otago Southland Division) Canterbury Brain Collective Limited Canterbury Caledonian Pipe Band NZ **Canterbury Sports Development** Academy Tatai Whetu Waitaha **Canterbury Veterans** Cawthron Science & Technology Fair Central Bowling Club Cambridge Inc Central Otago Sports Chairperson of the Year Award, Deloitte Top 200 Awards

Chartered Accountants CAANZ Charteris Bay Golf Club Inc Crockfords Bridge Club Diversity Counselling New Zealand Duffy Books in Homes **Dunedin Choral Society** Dunedin Lawn Bowls Stadium Inc Dunedin RSA Dunedin Symphony Orchestra Eagles Golf (Otago) East Coast Bays Bridge Club Inc East Coast Rural Support Trust Fairfield Rotary Fairview Golf Course Federated Farmers of NZ Inc Forsyth Barr Stadium Friends of St Joseph's New Plymouth (FOSJ) **Gisborne Speedway** Good Neighbour Aotearoa Trust - Tauranga Greenacres Golf Club Inc Gumboot Friday Golf Fundraiser Halberg Foundation Hamilton Central Rotary Hamilton East Rotary Hastings Golf Club Inc Havelock North Bowling Club Inc Hawke's Bay A&P Society Hawke's Bay Rowing Club Inc High Impact Athletes NZ Charitable Trust Howick Golf Club Hutt Bowling Club Inc Hutt Valley Chamber of Commerce Hutt Valley Sports Awards Inc Kai for Kids Charitable Trust Kāpiti Arts & Crafts Society Inc Kāpiti Community Patrol Karori Bridge Club Life Education Trust Auckland Central Life Education Trust Canterbury Life Education Trust Wellington City Life Flight Trust Air Ambulance Lions Club of Ashburton

Lions Club of Mana Charitable Trust Live Ocean Foundation Mackenzie Country A&P Society Macleans College Malaghan Institute of Medical Research Manawatū Golf Club Inc Manawatū Rangitikei Federated Farmers Marcus Daniell The Gift Trust Masterton Golf Club MatesofMates4Mates - fundraising for Rural Support Trust Mellowpuff Charitable Trust Millbrook Country Club Limited MoneyTime NZ Foundation Mount Maunganui Bridge Club Inc Mt Maunganui Golf Club Inc National Association of Women in Construction Nelson Bowling Club Nelson Giants Basketball Nelson Golf Club Nelson Mountain Bike Club Inc Nelson RSA New Zealand Amateur Sport Association Inc The Kiingi Tuheitia Portraiture Award Nomads Golf Club NZ Inc North Canterbury Sport & Recreation Trust NZ Art Show NZ Rural Games Trust Omanu Beach Surf Life Saving Club Inc **Omanu Primary School** One Tree Point Bowling Club **Ōrewa Bridge Club Inc Orpheus Choir of Wellington Inc** Otago Community Hospice Trust Otago Medical Research Foundation Otago Rugby Football Union Inc Oxford & Districts Lions Club Pakuranga United Rugby Club Pancreatic Cancer Support Association Paraparaumu Beach Bowling Club Inc Paraparaumu Beach Golf Club Inc Paraparaumu Bridge Club Inc

Community Support (continued)

Paraparaumu Croquet Club Inc **Preservation Society Inc** Queenstown Bowling Club Rangi Ruru Girls' School Raumati Bowling Club Inc Ripe - Wānaka Wine and Food Festival **Riversdale Golf Club** Ronald McDonald House Charities NZ Trust Roslyn Wakari AFC Rotary Club of Avonhead Rotary Club of Cambridge Rotary Club of Dunedin Rotary Club of Invercargill North Rotary Club of Kāpiti Rotary Tauranga Sunrise Royal Wellington Ladies Golf Classic **RSM Law Plunket Art Show** She Loves Golf Showbiz Queenstown Inc South Canterbury Chamber of Commerce Southern Hearing Charitable Trust Scholarship Southern Rugby Football Club Sport Hawke's Bay Sport Otago St Hilda's Collegiate School Staveley Ice Rink Surf Life Saving Kariaotahi Taieri Tennis Club Inc Takapuna Bowling Club Inc Taranaki Rugby Football Union Inc Tasman Rugby Union Inc Taumarunui Golf Club Tauranga Boys' College Rowing Club Tauranga Te Papa Big Wheel Rotary Trust Tauranga Water Polo Club Te Anau Golf Club Inc Te Awakairangi Golf Charitable Trust Te Manawa Museums Trust Te Ngutu Golf Club Inc Te Omanga Hospice Trust Te Puna School Parent Teachers Association

Tennis South Canterbury The Christchurch Golf Club The Gut Cancer Foundation The Little Miracles Trust Golf Fundraiser The Nelson Professional Theatre Trust The Otago Golf Club Inc The Plimmerton Bowling Club Inc The Rotary Club of Hutt Valley Inc The Yes And Trust **Tieke Golf Estate** Timaru Boys' High School Rugby Club Timaru Golf Club Spring Tournament United Country & Vineyard Cricket Club University of Auckland Investment Club University of Otago Vantage National Hockey Tournament Victoria Student Fund Charitable Trust Waikanae Rugby Football Club Waikanae United Bowling Club Inc Waikato Society of Arts Waimakariri Gorge Golf Club Waimea Sheep Dog Trial Club Waipu Rugby Squash Club Inc Waitārere Beach Bowling Club Inc Wakatipu High School Foundation Wānaka Golf Club Incorporated Wānaka Rowing Club Well Foundation Wellington Chamber of Commerce Wellington Children's Hospital Golf Fundraiser Wellington Free Ambulance Wellington Homeless Women's Trust West End Amateur Football Club Westpac Canterbury Chopper Appeal Westpac Hawke's Bay Chopper Appeal Westpac Lower Hutt Chopper Appeal Whangamatā Golf Club Inc Whangarei Theatre Company Inc Wingspan Trust (Home and Family Counselling) Work Ready Kāpiti Young Enterprise Trust

Three meaningful examples of our Community Support

- 1. MoneyTime
- 2. Mellowpuff Charitable Trust
- 3. Kiingi Tuheitia Portraiture Award

MoneyTime

They say money makes the world go round but, despite its importance in adult life, understanding how to manage it and make the most of it hasn't traditionally been a huge part of the education system.

Studies continue to show a worrying lack of financial literacy among New Zealand adults, but web-based programme MoneyTime is doing its best to rectify that through a clever combination of education, gamification and competition.

Co-founder, designer and CEO Neil Edmond says MoneyTime is a bit of a Trojan Horse, with the programme taking kids aged 10-14 through tricky concepts like compound interest, return on investment and mortgages in a way they can understand and enjoy.

"We're trying to normalise concepts like saving, budgeting, investing and using insurance. We want to show them that they don't have to be afraid of these things, and being exposed to them at an early age means they become part of the kids' vocabulary and thought process and understanding of how life works."

Exploring real-life decisions

As kids do the lessons - there are 30 in total and they can either be done in one term or once a week across a whole year - they earn virtual money for completing modules and answering quiz questions at the end. That money goes into a virtual bank account, different options are unlocked and then it simulates the decisions they may have to make in real life.

Students can spend their money on their avatars at different shops, or they can put money into a bank account with interest, donate it to charity, or invest in shares, property, collectables or their own education.

"We want them to see that they can do more with their money other than just spending it all on themselves. They have to see the value and benefit of doing that, so we find ways of making that concrete for them."

PARTNERSHIP SNAPSHOT: MONEYTIME

Despite its importance, financial literacy has been lacking in education. MoneyTime, a web-based programme, aims to change that for New Zealand kids aged 10-14 by making financial concepts engaging through gamification. Co-founder Neil Edmond explains that MoneyTime teaches saving, budgeting, investing, and insurance in an accessible way. Kids complete 30 lessons, earning virtual money for completing modules and quizzes, which they can then spend or invest, simulating real-life decisions.

Since its 2019 launch, over 76,000 students in 750 schools have used MoneyTime, showing a 40% average increase in financial knowledge. The programme's success is bolstered by school competitions and selfdirected learning, eliminating the need for teacher oversight. A recent report on the social return on investment of MoneyTime by Impact Lab proved that, appropriately enough, teaching financial literacy makes a lot of financial sense. Where, on average, charities in New Zealand deliver about \$2.00 in benefit for every dollar spent, MoneyTime delivers \$7.70.

"We get really good retention. The majority of the schools that use the programme come back because it's easy for teachers to use. They simply unlock the modules and the kids work their way through the programme themselves. The kids love it too; the humour, the language, the examples, they know it's specifically for them."

Broad impact across New Zealand

Since it kicked off in 2019, the programme has been used by over 76,000 students in 750 schools, which represents nearly half of all the primary schools in New Zealand. "We know the programme works," says Neil, because pre- and post-programme testing shows, on average, a 40% increase in knowledge over the whole course.



Another clever way to inspire interest in the topic is through the age-old tactic of inter (and intra) school competition.

The average scores of each class are totalled up from the quizzes they do at the end of each lesson and the classes with the highest average scores, combined with their completion rates, can win cash prizes.

Over 700 classes are participating in the competition this year, well up on the first year it ran in 2023.

"That's been huge and it has contributed significantly to completion rates. 30 lessons is a lot of lessons to complete for a non-core subject and we're delighted with the increase."

Options are positive

There are other online financial literacy programmes like Banqer and Sorted for Schools that are available to teachers, and Neil thinks it's great to have some variety so teachers can choose a programme that works for them.

A major benefit of MoneyTime is that it is 100% self-directed, he says.

"Kids can work through it at their own pace and it doesn't require any teacher oversight."

This means teachers don't need to do any training or professional development to deliver it and all children get taught to a consistently high standard.

Financial literacy is in the curriculum but it's quite vague as to where it gets taught, he says (it could be in maths, business or social studies classes). It's also not mandatory, and he wants both of those things to change. "That will take it a step further."

MoneyTime is also aiming to take its own business a step further. It already has a distributor in South Africa and is selling directly to schools in the US and Australia.



"There's demand for it. What we do is localise the programme for each country so it's 100% relevant to them."

Delivering real value

A recent report on the social return on investment of MoneyTime by Impact Lab proved that, appropriately enough, teaching financial literacy makes a lot of financial sense. On average, charities in New Zealand deliver about \$2.00 in benefit for every dollar spent, but MoneyTime delivers \$7.70.

"We're very proud of that. Over 30 charities have been assessed, and we're one of the leaders in terms of returns."

Its sponsors help deliver the programme to children at primary schools for free (it is also available in some high schools, but they have to pay because there is not enough sponsorship revenue yet) and while he would happily accept funding from the Ministry of Education, he says private businesses like Forsyth Barr understand commercial realities and the need to make decisions quickly.

"We couldn't do this without them and our other sponsors," he says.

Neil says the primary goal of the programme is to maximise financial success by improving understanding at an early age.

"If kids have the knowledge, they are more likely to engage with that area ... I think today's kids will be a lot better off than their parents because they can practice making financial decisions in school, rather than having to learn through trial and error in the real world, where errors can be costly."

www.moneytime.co.nz

Mellowpuff Charitable Trust

"Adversity doesn't choose. It just happens," says Terry Long. He and his wife Tanya experienced that firsthand when their 17-year-old daughter Mel died of leukemia in 2006.

Just before she passed away Mel asked her father to do two things: take her ashes back home so she could be with her parents and two brothers, and spend the money she had saved to go to university on young people in her home region of Taranaki who were going through tough times.

"She said 'you always talk about what comes around goes around, that's your philosophy, and we've had a lot of support from the community over the last few years.' So I made a promise to my daughter and I'm a man of my word," he says.

18 years on and the favour has been well and truly returned through the work of the Mellowpuff Charitable Trust (so named because Mel loved Mallowpuffs).

Supporting kids in a range of ways

Adversity is subjective, and there seems to be an unending supply of it these days. "But Mel said 'it doesn't matter what the adversity is, what colour they are, what language they speak, or what their financial situation is, if they've gone through adversity, I want you to help them.' You could be born with something, you could develop challenges, or you could experience something traumatic like suicides, fires or car accidents. We've supported kids who have seen things they should never have seen."

The process involves a simple one page nomination form that asks: who's the child, what's their adversity and how can we help? Things started off small, but Long says the Trust now receives 3-4 nominations a week and while it can't help everyone, it has helped a huge number of

PARTNERSHIP SNAPSHOT:

MELLOWPUFF CHARITABLE TRUST

Tragically, Terry and Tanya Long lost their daughter, Mel, to leukemia in 2006. Shortly before her death, Mel asked her father to use the money she had saved for university to help young people in their Taranaki community. Terry kept his promise, founding the Mellowpuff Charitable Trust, named for Mel's love for Mallowpuffs.

The Trust supports children facing adversity through various initiatives, such as funding trips to camps and sporting events, and creating memorable experiences for terminally ill kids. Volunteers run the Trust, ensuring 99.99% of funds go directly to supporting children. The community, including local businesses like Forsyth Barr, offers substantial support.

Terry and Tanya are the heartbeat of the Trust – they have found purpose in honouring Mel's wishes, creating a lasting legacy and positive impact in her memory.

under 19-year-olds and their families and become a beacon of positivity in the Taranaki community.

The money goes where it's needed

Because the Trust is run on a volunteer basis, he says "99.99% of the money that's raised is spent on the kids". Recently it has used the funds to send 40 kids from a low-decile school on an overnight camp for the first time, supported a chill out / sensory area in another school to help struggling students, and provided funding for around 70 tamariki and rangatahi to do the 'Moveable Programme', a localised adaptive gym sport, as well as helping several individuals with various needs.

The Trust doesn't give anyone money, "we just take care of things," he smiles.



The money has also been used to support kids who may not have long to live, and has offered helicopter rides or weekends away in donated baches.

"Some of these kids we've helped might pass away a few months later, but at least we saw a smile or created some joy or made a memory for them and their families."

One of the Trust's signature events - an idea Tanya came up with - is called the Christmas Break-in, which combines a short blast of communal effort and an unbelievable amount of community spirit to transform a house and create a very special Christmas for one family.

"I've called on many a tradie to help," Terry says, and they generally don't charge for their time or products. A number of businesses offer free or discounted products for the annual project and sponsors and previous recipients are often there to lend a hand.

"I tell people that I find all the pieces of a puzzle, I put them together and when it's made I go and do another one."

Annual events

Terry says the first event the Trust ran to raise funds was meant to be "our one and only golf day". They wanted to add to Mel's original \$12,000 in savings and they managed to raise another \$20,000 (including \$10,000 from a donor who liked what they were trying to do). Someone at the event said 'see you next year' and it's been running ever since. It also runs bowls and rugby events and the community always gets behind them.

"People say 'how can I help you?' Some people have money and they might be able to give us some. Some people don't have money but they might be able to give us time."

In the case of Forsyth Barr, it's a bit of both, says New Plymouth Manager Dave Fuller.

The connection with the Trust began when the team started looking for a shared cause as a way to build unity and support the local community.

"Terry came in and talked to us. He told us the story, he cried, we all cried, and we decided this



was something we wanted to support ... You don't really say no to Terry. You can't. He's not intimidating, you just don't want to let him down."

Forsyth Barr makes a donation to the Trust every year, but it's not just about the money, Terry says.

He says Forsyth Barr's local team can often be found cooking, serving and cleaning up on the golf day; they're there on their weekends to help at the Mellowpuff rugby day; and Dave Fuller even offers his bach so that it can be auctioned off to raise more funds.

"These guys at Forsyth Barr are emotionally connected to us. We're really taken aback by what they give outside of the dollars. We can do cool stuff with the money, but sometimes the other stuff is more valuable."

The Trust's heartbeat

Dave says Terry and Tanya are very much the heartbeat of the Trust.

"They are amazingly generous and resilient people. The community wraps around them and they are just so real you just can't help but get involved. And we get a massive buzz out of helping." Terry, who has been involved in sports his whole life and still has a full-time job, says he always tries to be "the right person doing the right thing at the right time" and thinks that "if everyone did something for somebody else it would be a better place to live". It's clear he's doing an outstanding job of living those principles - and an outstanding job of honouring his daughter's wishes.

He says the Trust is a beautiful legacy for Mel and a great way to keep himself occupied.

"If I wasn't doing this I may be in a dark place, or no place at all. Mel basically gave me a purpose," he says. "...I think she would be pretty proud of what we're doing and the way we're doing it. She's probably up there smiling and knowing that something good came out of a terrible situation. She's still having an impact 18 years later, so she'd be stoked. She'd be clapping and saying 'you did good today Mum and Dad.'"

www.mellowpufftrust.co.nz

Kiingi Tuheitia Portraiture Award

"There is power in being seen," says Jaenine Parkinson, the head of the National Portrait Gallery in Wellington. "Who we choose to put on the walls is really meaningful."

In the past, the people chosen to be on the walls tended to be politicians, explorers or those born into privilege. But she says the gallery's role is increasingly about telling the stories of all New Zealanders through the art of portraiture.

"We're trying to show portraiture for Aotearoa in the 21st century. What can we uniquely contribute? What is our place in the world? Where do we come from? Who are the people who have had an impact on the past?"

Uplifting young Māori artists

As part of that shift, the gallery launched a new biennial prize in 2020 that aimed to uplift young Māori portrait artists under the age of 35 and connect them to their tūpuna (ancestors). The late Kiingi Tuheitia, the Māori monarch and King of the Kiiingitanga, gifted the prize to the gallery.

"Many Māori have lost their connection to their whakapapa, so the challenge is to find and express that in some shape or form."

Entrants are filtered via an online process and the finalists are then exhibited at the gallery. The judges decide on the winner and runner up in person, and visitors to the gallery also have a chance to vote for their favourite in the Forsyth Barr People's Choice Award.

"We feel like it's important to see the pieces in person. There's real value in having an in-person encounter with an artwork ... We're very proud of the partnership and it's great that Forsyth Barr can be a partner to support that kaupapa. Art often sparks debate and challenges us to think. And People's Choice allows them to have a say in what speaks to them."

PARTNERSHIP SNAPSHOT:

KIINGI TUHEITIA PORTRAITURE AWARD

Jaenine Parkinson, head of Wellington's National Portrait Gallery, emphasises the importance of representation in portraiture. Traditionally, portraits featured the likes of politicians and prominent citizens, but the gallery now aims to tell the stories of all New Zealanders. In 2020, they launched a biennial prize to uplift young Māori portrait artists and connect them to their ancestors.

The late Kiingi Tuheitia gifted the prize, which involves online entry, in-person judging, and a Forsyth Barr People's Choice Award.

Forsyth Barr sponsors the prize and, importantly, the competition provides commercial opportunities for artists. The gallery values inclusivity and bicultural foundations, showcasing diverse mediums and contemporary approaches. Jaenine believes art fosters understanding and unity across cultures. She notes that "There is power in being seen. Who we choose to put on the walls is really meaningful."

Nationwide impact

Jaenine says they took the idea of sponsoring the award to Forsyth Barr because there was high engagement with it and also because the exhibition tours the country. At the moment it's showing at the Waitangi Treaty Grounds, so locals and visitors who come from around the world to learn about that partnership get to see the exhibition.

"It's the perfect spot for it there. But Forsyth Barr offices are located across the country and it's an opportunity to connect with audiences many times over. They can bring their community to see it. They can also host clients at those locations. So it works well."



Opening ceremony for the Kiingi Tuheitia Portraiture Award 2023. Photo courtesy of Moments Productions.

In addition to funding the prize, Forsyth Barr can also help showcase the artwork to a wider audience who may be interested in purchasing the artworks.

"Some of the artworks are for sale. It is a commercial opportunity for these artists as well. And not just for that one piece. Often we hear that commissions come out of it."

Art and creativity can come from anywhere. And awards like this can be helpful for drawing out talent from often hard to reach communities. For example, one of the past winners wasn't a practising artist and worked as a comms manager for the New Zealand Warriors rugby league team.

"The idea that art and sports don't mix, we put that to bed," she laughs.

Inspiring others

The winner of the Adam Portraiture Award, which happens every other year, said she was inspired by the previous winner, who was 18 and hadn't gone to art school.

"She thought 'if she can do it, then I can do it too.' That is what the late Kiingi Tuheitia was really keen on. Anyone could enter and anyone could win."

Seeing people who look like you on the walls of a national institution is powerful, Jaenine says.

"It says a lot. It says we're inclusive, it says we're committed to things like Te Tiriti ... The wharenui is the oldest portrait gallery in Aotearoa, so it makes sense there's a bicultural foundation to what we do."

The late Kiingi Tuheitia at the opening ceremony of the Kiingi Tuheitia Portraiture Award. Photo courtesy of Moments Productions.

The gallery aims to honour that foundation - and the stories of other ethnic communities - with its own exhibitions, but the Kiingi Tuheitia Portraiture Award is a way to "bring it to life and show the potential".

While traditional portraiture typically relied on realism, many of the entrants take a more contemporary and abstract approach and that can be challenging, she says. For example, the last winner's work had no recognisable face because it was about an ancestor they had never met.

"It really challenged the traditions of what portraiture is. It brought in Māori ideas of whakapapa and storytelling and the connection to the past." The entrants also embrace different visual mediums, like weaving, clay and carving.

At a time of increasing division, Jaenine says the arts can be a good way to "build partnerships in a way that makes them visible and real".

It could be something that young Māori artists are interested in contributing to, something Pākehā audiences are interested in attending, or something new refugee communities can relate to.

"Portraiture can be an idea that speaks across cultures," she says.

www.nzportraitgallery.org.nz/kiingituheitiaaward

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