



## Friendly yellow vans plan for the future

Sunshine Service transports the elderly and disabled to medical and dental appointments, recreational and social activities. It is a lifeline to the people that use it, many of whom would be housebound without the friendly door-to-door service.

Their fleet of four purpose built vehicles, which have hydraulic hoists and can carry two wheelchairs, have friendly and helpful volunteer drivers and assistants who take extra care when helping clients in to the vans.

Unique to Gisborne, the small community organisation relies on grants, donations and a small charge to clients to keep running. To help secure the transport service for the future they have established the Sunshine Service Endowment Fund at Sunrise.

Run predominantly by volunteers with only one part time paid employee, Barbara Clarke, Sunshine Service Chair, says they don't have the time or resources to do fundraising campaigns.

"Our workers are our workers they can't be our fundraisers as well. We have to go through other avenues."

They started the fund with money being held in reserve from when the Sunny Day

Trust was wound up. Barbara added that, although they had managed not to use the money so far, they were looking for "a safe way to secure the funds".

"Putting them in Sunrise was a better option than leaving them in the bank where they could be eaten away at."

Dave Mettrick, Sunshine Service Secretary/Treasurer, says they occasionally get the odd bequest.

"We are hoping our new endowment fund will encourage more of our clients and their families to give back to Sunshine Service safe in the knowledge of where their donation will go."

All donations to the Sunshine Service Endowment Fund will be invested, protected and grown to keep up with inflation and protect them from future market fluctuations. The surplus investment income will be returned to Sunshine Service each year, forever.



Sunshine Service committee members Brian Hutchinson, Rehette Stoltz, Barbara Clarke, Dave Mettrick and Sunshine Service Manager Ross Thomson, hope their new fund at Sunrise will encourage more people to give back to the vital community service.

## News in brief

### Craigs Xmas gift to Sunrise

Instead of sending Christmas cards the money we save goes towards more grants for needy causes in our community.

Last year Craigs Investment Partners joined us and donated the money they would have spent on Xmas gifts to Sunrise's General Fund. We'd like to thank Craigs and their clients for their generosity in what is a wonderful way to show support for the place they live and do business in.

We'd love you to join us this year, please give Glenda a call if you'd like more information.

### See us at The Show

Larsen Sawmills has kindly offered us a spot on their stand at The Show this year. John has been a great supporter of Sunrise ever since he attended our launch in October 2014. His ongoing support for Sunrise is greatly appreciated, not only is he a regular donor to Sunrise, he also supports our organisation out in the community by helping others to understand how the endowment model work. And he's recently come onboard as a Sunrise Gold Sponsor. Thanks John!

### Can you give up a cup of coffee a week?

The team at Turanga Health have been doing just that for over four years now. Each gives what they can donating as little as \$5 a week through Sunrise Workplace Giving and altogether they've donated over \$16,000. It just goes to show, donating a little bit often really does make a difference.

### Annual Report

You can read our latest annual report and financial statements on our website. Get in touch if you'd like a printed copy and we can send you one.





## Leave a lasting legacy

### What does Sunrise do?

- We raise funds from donations and legacies
- We invest funds retaining the capital and generating income
- We use income from investments to provide grants for local charities and organisations

## A few words from Glenda



I think it's true of most people that we become so involved in what we are doing on a day to day basis, we can forget to take time to reflect and appreciate the fruits of our labour. We've just had our AGM and preparing our annual report was a great opportunity to reflect back on everything that happened last year.

The 2018-19 financial year was transformative for Sunrise. We grew our endowments by a whopping 55% to end the year on \$3.8 million and have gifted nearly \$190,000 in grants since we launched in 2014. I felt really quite emotional reading about the generosity of our donors and the great work being done in our community by the charitable causes we gifted grants to. Seeing all the stories together like that, it really hit home to me what an impressive impact we've been able to make in such a short time. And that is all due to our donors, funders and sponsors.

As a community foundation we can only ever use one percent of endowments to cover administration costs. While it is great for our donors to know that 99 percent of their donation will help the community, it does present a challenge from a funding perspective.

We were delighted to announce at our AGM that Eastland Community Trust has provided \$400,000 to help with administration costs over the next five years. We thank them sincerely, their support with funding since we launched has been key to our early success, and this additional funding means we can now concentrate on our core objectives of growing our endowments and granting more back to our community.

We've got an epic milestone coming up when we celebrate our fifth anniversary later this year. We hope you can join us as we celebrate five fabulous years of generosity and giving in Tairāwhiti-Gisborne at a gala dinner at Bushmere Arms on Friday, 1st November. Our guest speaker is Cameron Bagrie, a well know economist who features regularly on The AM Show. You can read more about the event in this newsletter, please get in touch if you'd like tickets.

**Glenda Stokes**  
EXECUTIVE OFFICER

## Regular giving for Ngatapa's future

You could be forgiven for thinking the Hawea's eat, sleep and breathe Ngatapa.

Heith's family have been involved with Ngatapa Rugby and Associated Sports Club since 1964. His grandad Bronco never played for them, but was a staunch supporter of the club.

Heith's dad and two uncles, were players in the Ian Kirkpatrick era, and his Uncle David is an ex-president and life member.

Heith has either been playing, coaching junior and senior rugby, or refereeing for the past 13 years and their kids play for Ngatapa too.

Heith introduced his wife Michelle to the club, and she's an enthusiastic convert. She's on the committee and puts in a myriad of volunteer hours as well, managing junior teams and helping to build the club's membership, which has grown to over 500.

Michelle jokes that she "had to get onboard or be a widow. I love it, it's fun and keeps me young."

Michelle and Heith have recently started giving to the Ngatapa endowment fund at Sunrise, donating \$5 a week by automatic payment.

They were already doing regular giving to a national charitable foundation, but when Ngatapa established their fund they decided to stop that and donate to the Ngatapa fund as it was local and more meaningful to them.

Michelle says "we, like others, would like to give more money, but there's not many people that can write out a big cheque. With regular giving we can give a little bit each week and it helps the fund to continue to grow".

Michelle and Heith give because they want to make sure the club is always there. "We feel really blessed to have everything we have at our club. Our kids are the fourth generation of Haweas at Ngatapa and we want our grandkids to have the opportunity to play there too."



Wynter (holding Queen) and Lily Hawea are the fourth generation of Haweas at Ngatapa. Their parents Michelle and Heith have started donating \$5 every week to Ngatapa's fund at Sunrise to make sure the club they love will be there for their grandkids as well.

## Bayleys keeps the sun turned on this winter

The sales team at Bayleys Gisborne have committed to donating \$600 to Sunrise for every property listed and sold in July and August.

Karen Raureti, Director Bayleys Gisborne, who are also Sunrise Gold Sponsors, says they see Sunrise as "a really good fit for our business as Sunrise touches so many people we already work with on a daily basis".

"Community sponsorship is a massive part of our business. We get thousands of requests for help each year, so we know how hard it is out there for community organisations and charities. Even though we'd like to, it's hard to help everyone and everything. We see Sunrise becoming a huge resource for our community as it grows and are excited to help them do so."

Simon Bousfield, Director Bayleys Gisborne, says with the winter campaign "we want to give the clients we are working with the opportunity to support Sunrise by donating part of our sales commission to Sunrise - \$600 per sale".

"We think Sunrise is great because they only grant to local causes and people can also direct their donation to causes they like through one of Sunrise's 36 special interest funds. Our vendors can choose which fund they'd like the donation from their sale to go to."

Sunrise celebrates five fabulous years of generosity and giving in Tairāwhiti-Gisborne at a gala dinner on Friday, 1st November. The team at Bayleys Gisborne have sponsored key note speaker Cameron Bagrie.

Karen says "Cameron works closely with Bayleys nationwide and we saw him speak at our owners forum earlier this year. I was really surprised with how entertaining and on point his talk was."

"You need to wipe away everything you think about a standard economist. Cameron is unique in that he talks in a very down to earth and relevant way. He is interesting, funny and can engage an audience better than many professional entertainers I've seen".



Bayleys are donating \$600 to Sunrise for every sale in July and August and their clients can choose which fund they would like their donation to go to. They are also sponsoring key note speaker, Cameron Bagrie, at our 5th Anniversary Gala Dinner Celebration. Picture here with Glenda are Bayleys Directors Karen Raureti and Simon Bousfield.

THE SUNRISE FOUNDATION



**5<sup>th</sup>**  
*Anniversary*  
**GALA DINNER  
CELEBRATION**

FRIDAY | 1ST NOVEMBER | 2019  
5.30PM | BUSHMERE ARMS



GUEST SPEAKER  
**CAMERON BAGRIE**  
FORMER ANZ HEAD ECONOMIST AND  
REGULAR GUEST ON THE AM SHOW

COURTESY OF **BAYLEYS**

**TICKETS \$115**  
P. 06 867 7939  
E. [info@sunrisefoundation.org.nz](mailto:info@sunrisefoundation.org.nz)



**The  
Sunrise  
Foundation**  
*Local Giving for Local Needs*

We hope you can join us as we celebrate  
**FIVE FABULOUS YEARS** of generosity  
and giving in Tairāwhiti-Gisborne

## Eastland Community Trust grants significant funding to Sunrise



We announced at our AGM that Eastland Community Trust (ECT) has granted \$400,000 to Sunrise to help cover administration costs for the five financial years 2020-2024.

We would like to thank ECT for their support, which will be a huge help as we strive to build a powerful taonga (treasure) for our community for generations to come.

### Tu ora ai tātou – Living well together

It has taken the Eastland Community Trust (ECT) 26 years to be in the position where we can now make over \$10m in distributions annually, whilst preserving the Trust capital.

ECT got here through careful stewardship of the Trust funds, the steady growth of Eastland Group and a dose of patience spanning nearly three decades.

That is why our \$400,000 distribution to the Sunrise Foundation is so important. As per their operating model, just one percent of each donation goes towards operating costs, the rest they invest, retaining the capital and generating income for grants.

While it's a huge positive that 99 percent of all donations go direct to the community, it presents some challenges in running the Foundation in its early stages.

Therefore, the ECT distribution is specifically for operating costs for the next five years, so Sunrise can focus on the mahi they do, until they've grown large enough to be self-sufficient.

The Eastland Community Trust's vision for community wellbeing is Tu ora ai tātou – Living well together.

This means living well at home, at work and in our communities, Sunrise tautoko community groups, organisations and initiatives that support Tairāwhiti-Gisborne to do just that.

It is also important to note that the purpose behind establishing Sunrise was to create a permanent community endowment fund that was governed locally, community focused and one that will benefit the region forever.

If Sunrise and other organisations like it are given the support to succeed, we can grow our pool of local community organisations and funding avenues, so they're able to do more, not just now but for generations to come.

For The Sunrise Foundation, the journey is only just beginning, and we are privileged, and excited to be a part of it.

Nga mihi,  
Eastland Community Trust Chief Executive  
Gavin Murphy.



ECT Trustee Lyall Evans, Glenda and ECT Chief Executive Gavin Murphy

**Look how far we've come**



**\$4.2m**

Funds invested



**\$3.5m**

Promise in wills



**\$188,000**

Granted to our community



**1.25**

Full time staff supported by 11 volunteers

## September is Wills Month - Is your will up to date?

It may surprise you to know that 50 percent of New Zealanders don't have a will.

Sorting out your will is a task that is all too easy to put off. But things could get messy for those you leave behind if you die without a valid, up-to-date will.

With September being Wills Month it's a good time to think about writing a will if you don't have one, or updating your existing will if your circumstances have changed.

Having a will gives you comfort of mind that you have made the best provision possible for the people and causes you care about, making it easier on your family and friends if the worst should happen.

Ross Revington, Woodward Chrisp Partner, has several clients that have left bequests to Sunrise in their will. He says some of his clients "wanted to leave to charity without knowing the best way to do it. I mentioned Sunrise and suggested they speak to Glenda to find out more information."

"It was good because they were already looking to leave something to charity. I was able to direct them to Sunrise without giving an expert opinion and they were able to get the information they needed from Glenda to help them make their decision. The process worked very well."

He added that he's only had positive experiences with clients that have left money to Sunrise.

"Sometimes people want to leave to charity but don't know which one or if their chosen charity will still be in existence by the time they pass away. In the case of my clients Sunrise fitted the bill for them exactly, it's local and for the long term."

Sunrise is a simple and lasting way to support local charities and causes that are important to you. You can add Sunrise to your will for free in the month of September with our partner law firms Burnard Bull & Co; Rishworth, Wall & Mathieson; and Woodward Chrisp.



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## Leave a lasting legacy

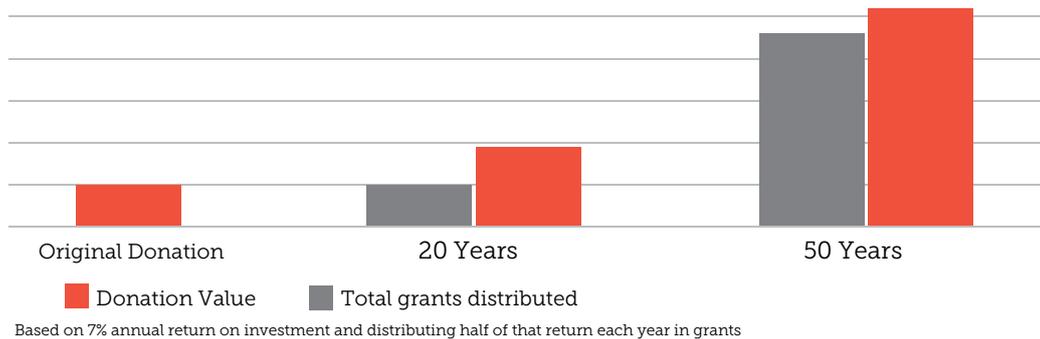
The Sunrise Foundation is a simple and lasting way to support local charities, organisations and causes that are important to you.

You can choose to donate to Sunrise's General Fund or your favourite charity or cause through a special interest fund. You can support causes that are close to home and close to your heart.

Sunrise is an organisation for local people to give for local needs, to help build a strong future for Tairāwhiti-Gisborne forever.

## Make your charitable giving have a bigger impact

All donations and bequests to Sunrise are invested in endowment funds in perpetuity (forever). Every year some of the investment income is retained to ensure your gift grows in line with inflation and is protected against investment market fluctuations. The balance of the income from investments is distributed to worthy causes throughout the Tairāwhiti-Gisborne District each and every year forever.



Over 20 years your donation will double in size and grants to the value of your original donation will have been granted to worthy causes. Over 50 years your donation and the total grants to our community will be 5 times more than your original donation.

## 99% of your donation works for our community

As a community foundation Sunrise can only retain a maximum of 1% of endowment value each year to cover operating costs. Until we grow endowments to where we are self-sufficient we are fortunate to have the generous support of our funders Eastland Community Trust and Clark Charitable Trust; gold sponsors Amber Dental, Bayleys Gisborne, Larsen Sawmilling and Self-Storage Gisborne; and numerous organisations and volunteers that have helped us along the way.

We appreciate the immense support we receive from so many as we strive to build a powerful taonga (treasure) for our community for generations to come.

If you or your organisation would like to help us on our journey by providing sponsorship, practical assistance or volunteer time please get in touch.



## Who runs Sunrise?

We have a volunteer board of nine trustees who provide a robust governance and succession model. The trustees are a group of respected and trusted individuals from within our local community.

Our trustees are John Clarke QSO JP (Chair), Lilian Tangaere Baldwin, Richard Briant, Colin Christie FCA, David Clark, June Hall, Dame Bronwen Holdsworth DNZM, Joe Martin and Reweti Ropiha.

The trustees support the executive officer and committees. The Investment Committee consists of Colin Christie (FCA), David Clark and Richard Montgomery (FCA). The Grants Committee is Lilian Tangaere Baldwin, Richard Briant, Colin Christie, David Clark, Rob Dymock and Leslynne Jackson.



### The Sunrise Foundation

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