



**LIVE HERE
GIVE HERE**


HAWKE'S BAY
FOUNDATION

2024 Impact Report

*Hamilton Logan visiting
HB Rescue Helicopter Trust*

“I don’t think one owes it to your children to leave them millionaires. You help them as much as you can in your lifetime, and what’s left at the end is a bonus. We’ve had 66 years together and enjoyed a great life and if, like us, you have an ounce of philanthropy in you, then Hawke’s Bay Foundation is a wonderful vehicle to put it into practice.”

David Etheridge, Donor



Wairoa Young Achievers
Trust CACTUS Programme

A MESSAGE FROM OUR CHAIR

Tēnā koutou,

As Giles Pearson retired from the board, I was honoured to take over the role of Chair at the end of 2023. I would like to formally thank Giles for all his expertise and dedicated work he has provided to the Hawke’s Bay Foundation over his seven years as a trustee, four of which were as Chair. Like those who have gone before him, his contributions have added to the growth, in all aspects, of the Foundation. Thank you, Giles.

How can we find enough words to thank Jules Nowell-Usticke who resigned during the year, having reached her maximum tenure? Jules and her husband Tim were cornerstone donors (with nine other cornerstone donors), 12 years ago, who not only had a vision, but also had the skills, expertise and drive to establish the Foundation. Their goal was to raise an initial \$10million and they achieved it. As at 31 December 2024, the funds under management stood at \$11,575,859. In addition to Jules’ nine years as a trustee, she also supported the Foundation in any way she could. And to you Jules, thank you again.

Another change was brought about when Amy Bowkett resigned in May 2024 after 6 years at the helm. We’re incredibly thankful for Amy’s dedication to our mission; serving the goals and objectives of the trustees and leading our staff from the fledgling organisation she signed up for to the now credible Foundation, poised for the next stage of its development.

After a thorough recruitment process, we were thrilled to welcome Alesha Hope to the position of Executive

Officer. Since commencing, Alesha has introduced herself to key donors, stakeholders and supporters, set in place rigorous plans for 2025 (which she is implementing with vigour) all while learning the role and dealing with a new Board Chair. The Board looks forward to harnessing your passion for the Foundation and your significant expertise in the charities sector.

Alesha’s integration into the role has been made so much easier with Amy’s thorough induction, and the support of Vanessa Bousfield (our Marketing and Distributions Officer) and Rachel McIlwaine (our Administration Officer). Our team’s output both in quantitative and qualitative terms is simply phenomenal. A huge thank you to the team.

If that change was not enough, during 2024 the Foundation also engaged new accountants, Epplett & Co Ltd, because of the increasing complexity of our transactions; changed our fund manager to Craigs Investment Partners; and set our new 5-year strategic plan,

All this change has set the Foundation up to advance its charitable works into 2025 and the years following. While all of this is inward looking, it was necessary to make sure the building blocks are in place for the next stage of our evolution.

Our revised strategic plan sets the goal of distributing \$800,000.00 annually by 2029. To achieve this, our funds under management will need to be \$20 million.

This requires us to continue to work with our very generous donors, both current and future, on the one hand, and to have an in-depth knowledge of, and connection with our numerous charities doing such great work in Hawke’s Bay, to ensure our funds are having maximum community impact.

The above is an update on 2024, and a glimpse at our strategic goal to 2029. But I am beginning to think about 2125 – 100 years from now. What vision do we have for then? We say the Foundation is here in perpetuity; so what will Hawke’s Bay be like in 100 years, and what role will the Foundation play?

In closing, I wish to thank all who have contributed during the year, in so many ways. A heartfelt thank you.

**Ngā mihi nui,
Kevin Callinicos, Chair**



2024 IN REVIEW

Tēnā koutou,

We are incredibly proud of the progress Hawke’s Bay Foundation made in 2024, and the impact we have enabled across Hawke’s Bay communities.

I was grateful for the opportunity to step into the role of Executive Officer in July 2024, and to continue the momentum that was created by Amy Bowkett and those that came before us. It is those that have come before us that have built Hawke’s Bay Foundation into the trusted and respected organisation that it is today.

However, we only exist because of the donors that choose us to be the guardian of their generosity. I thank all of those that have stood beside us and shared in our vision of a thriving Hawke’s Bay.

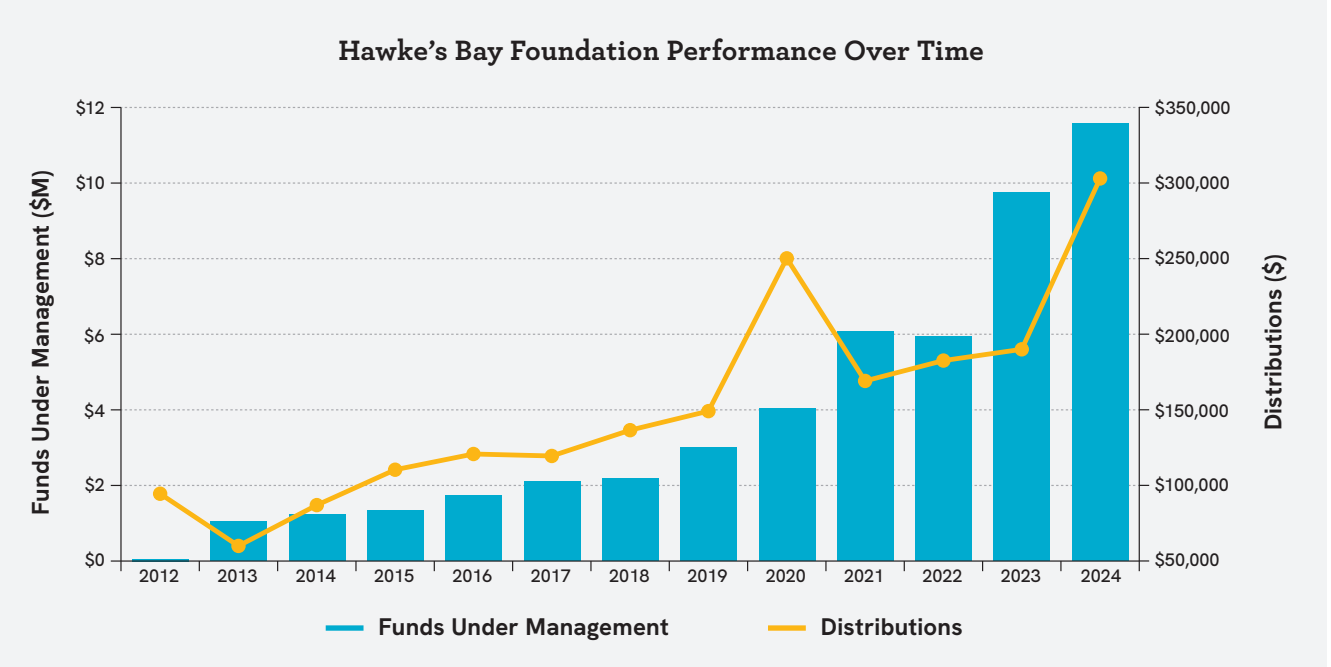
I am honoured to work alongside the Hawke’s Bay Foundation team of Vanessa Bousfield and Rachel McIlwaine, both who bring expertise, dedication and passion to their roles. They are the engine behind the organisation that enables us to be a kaitiaki of generosity and ensure we are growing a deep understanding of the needs and challenges of our communities.

I would like to make special thanks to our 9 volunteer Board members who bring an exceptional level of expertise, innovation, governance and insight to the organisation. I am proud to work alongside each of them as we strive towards achieving our strategic goals. The impact of their work will leave a permanent legacy on our region.

Last year we witnessed first-hand the increasing need for funding across the charity sector in Hawke’s Bay, alongside an increasingly difficult landscape to secure funding and generate revenue. Through the generosity of our donors, we are proud that we were able to provide some funding relief through our annual grant round.

We need to grow, because the reality is that the needs of our community are growing. I am humbled by the individuals and organisations that chose to establish the 5 new funds with Hawke’s Bay Foundation in 2024.

As Hawke’s Bay Foundation itself is a charitable entity, we are not immune from these challenges. Donors select Hawke’s Bay Foundation as the guardian of their generosity, because of the value we bring and the point of difference we offer. To deliver this level of service year-on-year requires growth that is well-resourced, strategic and considered. So it is with deep gratitude that I thank our Foundation Family, the special group of donors that support our operating costs to help us to continue to build on our progress and encourage a culture of philanthropy in our community.



This graph only discloses our annual HBF distributions and excludes any donor directed or pass-through distributions. 2020 figures include distributions made from the EmergencyResponse Fund set up for Covid support.

“It is the power of the collective that will create a thriving Hawke’s Bay.

We measure the success of Hawke’s Bay Foundation based on our impact on our community. Our growing annual distributions illustrate the growth of our impact. Our distributions this year of \$640,029 brings our cumulative total to \$4.01million in community funding since our inception in 2012. This impact was only made possible because the visionaries that sowed the seeds of the enduring legacy that is Hawke’s Bay Foundation.

Thank you for your ongoing support and creating the impact detailed in this report.

Ngā mihi nui,
Alesha Hope, Executive Officer



OUR COMMUNITY IMPACT 2024

\$640,029
Total distributions 2024*

65
Local charities supported

63
Total funds

\$11.58M
Total funds under management

14.92%
Gross annual return on investments

4 Scholarship programmes supporting **7** students

*These distributions include our annual funding round, The Tindall Foundation distributions, donor tagged distributions, funds reinvested at donor requests and pass through distributions.



Napier coastline
Richard Brimer

WAIROA
DISTRICT

Wairoa ●

Mahia Peninsula ●

HASTINGS
DISTRICT

NAPIER
CITY

Napier ●

Hastings ●

CENTRAL
HAWKE'S BAY

● Waipukurau
● Takapau

● Pōrangahau

WHERE WE WORK

We are fostering healthy, thriving, and resilient communities across Hawke's Bay, from Wairoa in the North to Pōrangahau in the South. We support the causes, projects and people that improve the lives of all in Hawke's Bay, creating a prosperous, vibrant region for all to enjoy, for generations to come.

STRATEGIC PLAN

In early 2024 the board created a new 5-year Strategy to guide Hawke's Bay Foundation through our next stage of growth.

Vision

A thriving Hawke's Bay community

Purpose

Improving the wellbeing of the Hawke's Bay community by growing an enduring fund

Strategic Goal

To grow our fund to \$20m in 5 years, so we can increase impact across Hawke's Bay by distributing \$800,000 to charitable organisations addressing the biggest needs in our community

Values



Work together
as a team
& community



Support
our people
& community



Respect others
and value
differences

How we will deliver impact

We cultivate generosity by prioritising people in all we do, using our platform to connect local giving with community needs.

We understand our community's greatest needs and know the best organisations to tackle Hawke's Bay's most urgent challenges.

We have strong funding processes to ensure grants are getting to where they are needed the most.

We recognise our responsibilities under Te Tiriti and are committed to strengthening our partnerships with Mana Whenua and Tangata Whenua.

We have passionate people, efficient systems, and streamlined processes to drive our vision and support growth.

We are an inspirational place to volunteer and work.

We have robust governance and strategic investments to drive sustainable growth.

The change we want to see

Philanthropic giving to be a fundamental part of the Hawke's Bay community.

Our region is vibrant, resilient, culturally diverse and everyone feels connected within our community.

Everyone has access to the necessary skills, resources, and support for individuals to thrive.

Our environment is nurtured and protected for the benefit of future generations.

Hawke's Bay Foundation continues to be a trusted and respected philanthropic and community partner.

**LIVE HERE
GIVE HERE**



HAWKE'S BAY
FOUNDATION

DISTRIBUTIONS

One of the most rewarding aspects of being a part of the Distributions Committee is meeting the generous and passionate people who are working within our charitable sector. Every year during the month of May, Hawke’s Bay Foundation holds a series of “Round Table” meetings where representatives of organisations that have previously received grants are invited to share with us and fellow recipients their achievements and challenges over the last year. It is also a time we can network with each other and understand where needs exist and how organisations are working towards a thriving Hawke’s Bay community.

We are grateful to act as the Local Donation Manager for The Tindall Foundation, a philanthropic family foundation working throughout Aotearoa to support families, communities and the environment. This relationship allows us to connect their vision with the amazing mahi happening within Hawke’s Bay, for greater impact.

Applications for the 2024 funding round opened in June and the Distributions Committee considered each application against community needs and funds available.

The good news for 2024 was that HBF distributed over \$302k to community organisations within Hawke’s Bay from its 2024 funding round. This represented a 59% increase over the previous year. Of the 104 applications received, we were able to support 65 community organisations. This includes distributions from our annual funding round as well as The Tindall Foundation funding.

Over and above this figure Hawke’s Bay Foundation distributed \$53,927 as “Donor Tagged” distributions, \$25,388 for funds reinvested at donors request and we supported 7 new students through our 4 scholarship programmes.

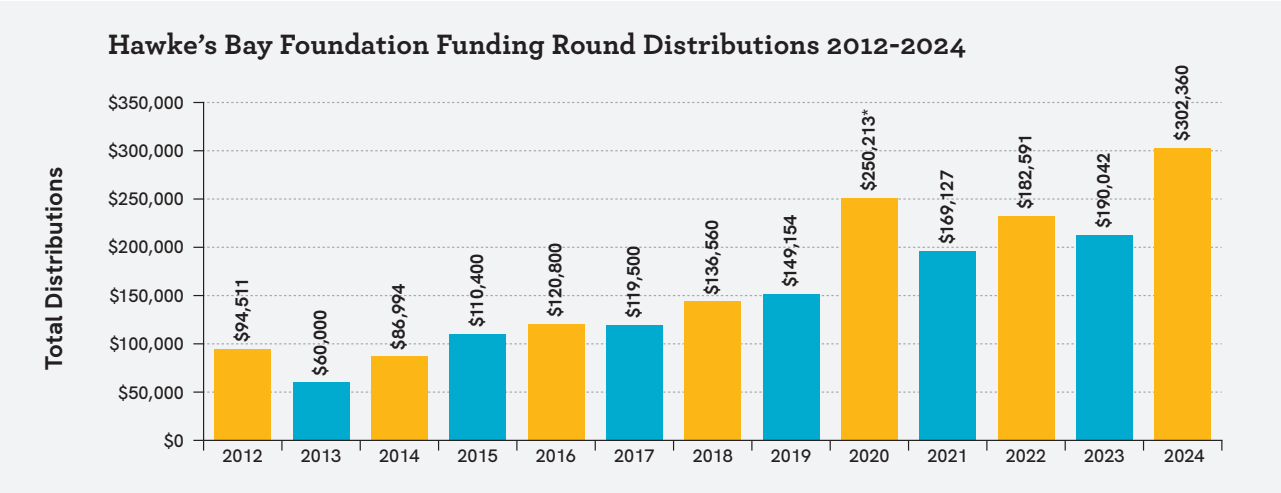
The Total Community Impact from the Hawke’s Bay Foundation in 2024 was \$640,029 distributed into the Hawke’s Bay community.

When we look back on 2024 we see a year of recessionary challenges following on the heels of the covid and cyclone years. Many organisations we support have struggled for funding at a time when community needs have never been greater. The Distributions Committee works diligently for a thriving Hawke’s Bay. With a deep understanding of our community’s greatest needs, we know the most effective charitable organisations to tackle Hawke’s Bay’s most urgent challenges.

With the challenges of recent years still front of mind we are reminded how important Community Foundations are in New Zealand. The Community Foundations model invests the donor’s original donation forever, and only the income is distributed every year.

The growing family of Hawke’s Bay Foundation donors and sponsors is supported by a small but exceptionally professional and dedicated team who are committed to making a meaningful impact within our community. We thank each and every one who has helped achieve a strong result in 2024 and with a combination of recent donations, bequests and trust transfers we look forward to an even larger distribution in 2025.

Craig Hay
Chair, Distributions Committee



This graph only discloses our annual HBF distributions and excludes any donor directed or pass-through distributions.
*2020 figures include distributions made from the EmergencyResponse Fund set up for Covid support.

2024 ANNUAL FUNDING ROUND RECIPIENTS

Connecting generous people that care with causes that matter

2024 ANNUAL FUNDING ROUND RECIPIENTS (Includes The Tindall Foundation funding)	GRANT (NZD)
Age Concern HB	\$5,000
Age Concern Napier	\$5,000
Anxiety New Zealand Trust	\$2,000
Ātea a Rangi Educational Trust †	\$4,000
Awhi Charitable Trust	\$7,000
B.R.A.V.E Foundation †	\$6,000
Bellyful NZ Trust	\$3,000
Big Brothers Big Sisters of HB †	\$7,500
Birchleigh Polo Club	\$3,000
Birthright HB	\$5,000
Brain Injury HB	\$5,000
CAB Hastings	\$5,000
CAB Napier	\$7,000
Cancer Society of NZ HB	\$6,000
Central Connect Whare Manaaki	\$5,000
CHB Budget Services	\$4,000
CHB Parents Centre	\$5,000
CHB Foodbank	\$3,000
CHB William Pike Challenge	\$4,800
Christian Lovelink	\$4,000
CONNECT Youth & Community Trust	\$3,000
Cranford Hospice	\$5,000
Cycling Without Age Napier	\$2,000
Earth Gardens Charitable Trust	\$3,000
English Language Partners	\$2,000
Epic Ministries	\$5,000
Family VIP	\$9,000
Family Works Hawke's Bay	\$8,000
Festival Opera	\$2,000
Food Basket CHB	\$6,000
Graeme Dingle Foundation HB †	\$5,000
Hastings Riding for Disabled	\$4,000
HB Museums Foundation Trust (MTG)	\$5,000

2024 ANNUAL FUNDING ROUND RECIPIENTS (Includes The Tindall Foundation funding)	GRANT (NZD)
HB Rescue Helicopter Trust	\$7,000
HB Youth Trust (Giant's Boxing)	\$8,000
Heretaunga Womens Centre	\$5,000
Hōhepa	\$6,000
Kia Haumaru - Personal Safety Education	\$2,000
Kidnnections Charitable Trust †	\$7,000
Knowledge Bank HB	\$2,200
Ko Wai Tou Ingoa Hauora †	\$7,000
Lifelink / Samaritans	\$2,000
Maca Sports Leadership	\$6,000
Manaaki Tāngata / Victim Support †	\$5,000
Mates of HB Charitable Trust	\$5,000
Napier Family Centre †	\$7,000
Napier Riding for Disabled	\$4,000
Nga Toi Hawkes Bay	\$2,000
Nourished for Nil	\$5,000
Orange Sky NZ	\$3,500
Order of St John Central Region Trust	\$5,000
Parent 2 Parent	\$4,000
Paul Hunter Centre	\$5,000
Peoples Advocacy Society	\$2,000
Pregnancy Help Hastings & Napier	\$3,000
Prima Volta	\$4,000
Raukatauri Music Therapy Trust	\$5,000
Re-Source	\$5,000
StarJam	\$2,000
Sustainable HB (Environment Centre)	\$5,000
Taku Mamia Trust †	\$5,000
Tātau Tātau o Te Wairoa	\$3,500
Thermals for Children	\$2,860
Wairoa Young Achievers Trust (WYAT) †	\$6,000
Wharariki (Flax) Trust †	\$6,000

† denotes distributions made from the Tindall Foundation



“We love the Hawke’s Bay Foundation’s motto, “Live Here, Give Here” as local support is vital to our work. As a grassroots nonprofit, having reliable backing has been essential—from our humble beginnings as a small team to now supporting 2,000 families weekly, Hawke’s Bay Foundation have been a steadfast partner throughout our journey.”

Christina McBeth, Nourished for Nil

ENDOWMENT FUND

Hawke’s Bay Foundation’s Endowment Fund grew significantly again in the financial year ended 31 December 2024. The growth was achieved by the receipt of generous donations, and this year boosted by a stella 14.92% net gain (\$1,542,460) on the Foundation’s investment portfolio. Over the past five years the investment portfolio has gained at an average of 6.66% per annum.

Financial markets showed resilience in 2024, extending the bull market that began in late 2022 as stocks weathered a number of significant events. The local share market put in its best performance since 2020.

The Trustee’s investment strategy, which is set in HBF’s SIPO, is regularly reviewed by the Trustees. The strategy is implemented and monitored by Craigs Investment Partners, who have now been in that role for 12 months.


Notwithstanding the Endowment Fund’s “stella” investment performance this year, distributing 4% annually to charities is one of the structural cornerstones of the Foundation. This ensures regular distributions can be made every year, provides a buffer for years when investment returns are low, and overtime enables the Endowment Fund to grow through the compounding effect.

HAWKE’S BAY FOUNDATION	2024
Endowment Fund - 1 January 2024	\$9,729,662
Donations received*	\$888,493
Return on investments	14.92%
Endowment Fund - 31 December 2024	\$11,575,859

Look how far we’ve come since 2012



\$4.01 million
Gifted to the local community
(includes pass-through donations)



\$11.58 million
Total Endowment Funds

“We have donors of all shapes and sizes – those that give \$10 per month to those that give more substantially, not forgetting those that do so once they pass away. Hawke’s Bay Foundation really is an incredible way of giving back to a place you love.”

Jules Nowell-Usticke, HBF Founding Member



468
Grants made to local charities

*Includes pass-through donations received.
Hawke’s Bay Foundation uses 1% of the endowment fund for operational costs with the balance of operations funding derived from donations and sponsorship. All funds were invested in compliance with our SIPO which can be viewed on the Foundation’s website.

LIVE HERE, GIVE HERE



Local Generosity Drives Community Impact Growth

Community impact as a result of Hawke’s Bay Foundation funding is having a positive ripple effect, buoying hard working charities from Wairoa to Central Hawke’s Bay.

From a record 104 applications for funding in 2024, 65 were successful. Hawke’s Bay Foundation was able to distribute critical support to assist sectors ranging from: health, education, the environment, Te Āo Māori, youth development, elderly care, arts, heritage and social services.

Our Executive Officer, Alesha, reflects that the increasing impact provided by this year’s funding affirms that the Foundation’s giving model is effective and sustainable.

“Each year, as the Foundation’s endowment fund grows, thanks to our generous donors, we have more to distribute. This will continue to track upward; with sustainable distributions of 4 percent each year. Our annual funding round this year represents a 59% lift on 2023, and a hugely encouraging 103% increase on five years ago.

“We’re seeing a marked increase in charities who have never approached us before for funding. As a local funder we prioritise our distributions to where it will make the greatest impact. To support our decision making, our specialist Distributions Committee considers every application on its merits against the level of need, equity and available funds.

“As times get tougher for everyday New Zealanders, the need for philanthropy will only increase. We are grateful for our donors that share our vision of a thriving Hawke’s Bay.”

A grant to The Wairoa Young Achievers Trust’s (WYAT’s) nationally recognised CACTUS programme is delivering initiatives that support rangatahi into training, education, and onto employment.

WYAT Chief Executive Denise Eaglesome-Karekare couldn’t be prouder.

“The programme’s impact is significant, especially in the transformation we see in the rangatahi aged 13 to 18 who participate. The value of this funding cannot be overstated, without it we would struggle to sustain our efforts.”

With over 800 rangatahi graduating from the programme since its inception in 2004, WYAT has

become a leader in youth development for Northern Hawke’s Bay.

From building resilient youth in Wairoa to food security in Central Hawke’s Bay, our funding across all community sectors is tangible and touching the lives of those impacted.

The Food Basket CHB welcomed funding in 2024. Funding essential service costs is vital to keep charities like The Food Basket CHB operating sustainably.

General Manager Mel King says anxiety is becoming a common feature of those experiencing food insecurity.

“The reality of the cost of living crisis has really set in. Optimism is hard to find in the conversations we have with the 600 people we see each week, which is very concerning.

“This funding is vitally important. Life has changed for a lot of people recently. Not being able to afford enough food for your family is a scary situation to be in and it really helps to know that others are in the same boat, and that there’s generosity and support available within our community.

“Funders like the Hawke’s Bay Foundation have stepped up to keep our van on the road, fund our venue and our key staff. We are enormously grateful.”

Unlike other funders who are experiencing a reduced ability to fund local charities, we are building permanent funding streams to achieve long term community transformation. 💖

Logan Legacy Lives On

New Zealand’s own Captain Tom aimed to walk 100 kilometres in his 100th year to help give those who need it, a second chance at life.

The Hawke’s Bay farming identity and former Magpie launched his own ‘Second Chance at Life’ Fund with Hawke’s Bay Foundation. Hamilton’s quest was to create a sustainable funding stream in perpetuity for three of his chosen charities: Hawke’s Bay’s Rescue Helicopter, Hato Hone St John and the Rural Support Trust for his own personal reasons – they relate closely to the community in which he has worked and save lives everyday, both young and old.

Hamilton Logan sadly passed away in August 2024, just 13 kilometres shy of his target 100 kilometres to raise money for these lifesaving charities.

Hawke’s Bay Rescue Helicopter Trust Chief Executive Andy Quayle was honoured to meet Hamilton when he visited the hangar.

“It was such a privilege to meet Hamilton, what an incredibly inspirational man whose vision for future generations of our community was to help give people a second chance at life. Through his legacy fund with Hawke’s Bay Foundation, our rescue helicopter service will benefit for years to come. What a magnificent legacy he has left for all of us, we truly appreciate it.”



Rural Support Trust Hawke’s Bay supports our rural heartland by providing practical support during difficult times. Area Coordinator Jonathan Bell reflects on Hamilton’s indelible legacy.

“Hamilton Logan was a great supporter of the rural industries and communities in Hawke’s Bay. His legacy will live on not only in his fundraising efforts, but more so through his wisdom, knowledge, compassion and genuine empathy to rural people. As he said, “You only live once, and life is for living.”

For many, the idea of being philanthropic is achievable only through their wills once they’re gone, but choosing to give while Hamilton lived gave him a great source of joy. In his own words while he was alive, it helped keep him going.

“Life is the most precious possession we have. I get such a kick out of seeing people get some relief or benefit out of something I’ve done for them, and I want to celebrate that with them. If what I’m doing only saves one life, then it’s all been worthwhile.”

Hamilton was memorialised by Hereworth School, as a fondly remembered Old Boy, with a tribute walk on what would have been his 100th birthday in November 2024.

You can continue to donate to Hamilton’s ‘Second Chance At Life’ Fund for his chosen charities through our website. 💖

LIVE HERE, GIVE HERE

Foundation Ushers in New Era

We welcomed a new Executive Officer while also farewelling and paying tribute to two long-serving members during the second half of 2024.

After six years at the helm, Amy Bowkett stood down from the role of Executive Officer, a position she described as “deeply fulfilling”. This was a difficult decision but after stewarding a pivotal phase of growth for the Foundation, she felt the time was right.

“All Community Foundations go through phases of growth and mine – the early growth phase – is finished. We are at a really good place to allow fresh eyes on our work and to take it to the next level. Throughout her time as the public face of Hawke’s Bay Foundation, Amy helped navigate the organisation through considerable endowment and profile growth, taking the fund from \$3m in 2018 to over \$11m under management today. I’ll be a lifelong supporter of Hawke’s Bay Foundation and of the Community Foundation model in general, so I look forward to watching it continue to grow.”

Building a community driven fund for the support of charitable activities within Hawke’s Bay has required energy, dedication and leadership.



“Everything about this role is personal – from helping donors with their philanthropic intentions to seeing the impact their giving had in the charitable world. Our Board and staff never missed a beat and it has been an honour to be part of the team.”

Alesha Hope took up the reins in July 2024. With over a decade of experience in delivering and creating sustainable fundraising strategies for charitable organisations, Alesha is enjoying steering Hawke’s Bay Foundation through a new phase of evolution.

“I’ve been hugely impressed observing the momentum and community support of Hawke’s Bay Foundation. I’m privileged to play a pivotal part in connecting people to organisations that make a real impact, and to help enable long-lasting philanthropy through a smart, sustainable model.”

2024 also saw us salute one of our founding members and staunchest advocates, Jules Nowell-Usticke. Jules retired from the Foundation’s Board of Trustees in June, following a tenure of nine loyal years and a total of fifteen supporting the organisation in various roles.

Jules admits when she and husband Tim adopted the community foundation concept and launched it

alongside other founders in Hawke’s Bay twelve years ago, the community was slow to recognise its benefits.

“When we started, we decided to set a ten year goal (\$10 million in 10 years) which at times seemed completely out of reach – what were we thinking! We had underestimated that we had a lot of information sharing to do. Community Foundations were a new concept and understandably our community needed time to gain faith. However, fourteen years on and our stars have aligned. What a huge thrill and so affirming!”

As an active community figure, Jules has successfully attracted many donors to the Foundation over the years, most notably Canadian philanthropists Dick and Val Bradshaw, who sold their River Lodge holiday home in 2022 and donated the entire proceeds to Hawke’s Bay Foundation.

“We have donors of all shapes and sizes – those that give \$10 per month to those that give more substantially, not forgetting those that do so once they pass away. Hawke’s Bay Foundation really is an incredible way of giving back to a place you love – it’s been a privilege in all sorts of ways. Knowing that so many charities will continue to be supported (and even more substantially as it grows), is a very heartwarming reflection.”

“Of course, despite no longer being actively involved, I will remain a committed advocate – forever!” ♥

Photo: Founding HBF Executive Officer, Amy Bowkett and new Executive Officer, Alesha Hope

‘Live Here Give Here’ Hooks Family Dairy Farming Business into Giving Back

Giving back to support local causes through their Community Foundation has been the cream on the top for an enterprising Central Hawke’s Bay dairy farming family.

A named family fund and a tertiary scholarship through Hawke’s Bay Foundation is helping BEL Group founder Andrea Barry and her family to achieve their charitable giving goals, without the set-up and administrative costs of managing it themselves.

Hawke’s Bay Foundation’s perpetuity based giving model and tagline ‘Live Here Give Here’ really appealed to community-minded Andrea, when setting the fund up several years ago.

“I have been involved in causes in the past that turned out to not be as they seemed, with the money going nowhere close to where it is needed. I still wanted myself and my family to become more philanthropic to genuine causes and once I heard about the great work of Hawke’s Bay Foundation and saw their slogan “Live Here, Give Here” I was hooked.”

Through annual capital donations of \$50 thousand per year, the Barry Family Fund has now grown to well over \$350 thousand. Unlike other charitable giving, their original gift is protected, with only the income earned used to support the causes they love.

Andrea enjoys the ability to tag her giving to her local and much-loved Central Hawke’s Bay.

“Our fund gives 25 percent to Sherwood School as that is the school my three children attended. It is a small country school with all the normal country school challenges but has a big heart and a strong community vibe, so it feels like I’m not just supporting the school but actually the whole community.”

As a progressive dairy farming business that has expanded in scale over thirty years, BEL Group now encompasses: eight dairy farms, five dairy support blocks, 9 nine thousand cows and supports seventy staff and their families.

For founder Andrea Barry, the backbone of business is about investing in people and place.



Andrea Barry (left) with BEL Group’s inaugural study grant winner, Von Mendoza.

“People, agriculture and community are all really important values for myself, my family and BEL Group. Our goal for our latest study grant is to assist anyone with a familial association with BEL Group who resides in CHB and has an interest in studying (preferably agriculture). Having Hawke’s Bay Foundation assist with setting up and co-ordinating this has been of great benefit to us.”

Losing her late husband and BEL Group leader Peter in 2009 has motivated Andrea to help others start their own ‘living giving’.

“Originally I wanted to keep our charitable giving on the down-low. Not wanting to raise attention to ourselves and being humble were the main reasons. However along the way I have found that speaking out and communicating what we are doing may help encourage others to start their own fund, however big or small, just get it started.”

When it comes to generational giving, Andrea is keen to instil a philanthropic mindset in her own children; Olivia, Robert and Sam.

“I always think – give them a little and they’ll do something, give them a lot and they’ll do nothing. We also use the phrase “win-win” a lot in our family. Feeling great about giving back without expecting anything in return, that’s got to be a win-win right?!” ♥



Orange Sky Aotearoa

OUR TEAM

Board of Trustees

Hawke's Bay Foundation's board consists of a group of trustees, all of whom bring a great deal of knowledge and experience from various sectors of the community.



Kevin Callinicos
(Chair)



Craig Hay



Cam McLeay



Kara Biggs



Kate Tokeley



James Wright



Andrew Caseley



Leisa Epplett



George Lyons



Jules Nowell-Usticke
(Trustee to June 2024)

Executive Team

Amy Bowkett (Executive Officer to June 2024)
Alesha Hope (Executive Officer from July 2024)
Vanessa Bousfield (Marketing & Distributions Officer)
Rachel McIlwaine (Administration Officer)

Committees

Finance, Risk & Audit Committee

Cam McLeay (Committee Chair)
Kate Tokeley
Andrew Caseley
Nigel Dawes

Investment Committee

James Wright (Committee Chair)
Andrew Caseley
Henry Pennington
Michael Chamberlain (Consultant)

Distributions Committee

Craig Hay (Committee Chair)
Kevin Callinicos
George Lyons
Kathryn Young (Community Representative)
Gwyn John (Community Representative)
Trish Giddens (Community Representative)

Communications & Engagement Committee

Kara Biggs (Committee Chair)
Jules Nowell-Usticke
Craig Hay
Cam McLeay
Leisa Epplett
Andrew Caseley

“We measure the success of Hawke’s Bay Foundation based on our impact on our community. This impact is possible because the visionaries that sowed the seeds of the enduring legacy that is Hawke’s Bay Foundation.”

Alesha Hope, Executive Officer HBF

PARTNERS & SUPPORTERS

Donors choose Hawke’s Bay Foundation as the guardian of their generosity, because of the value we bring and the point of difference we offer. To deliver this level of service year-on-year requires growth that is well-resourced, strategic and considered. As we stand today, our 1% administration fee does not fully cover our operating expenses. We need support to scale to grow our impact. Our Foundation Family are a special group of donors that donate to operating costs or offer their services to help us to continue to build on our progress and encourage a culture of generosity. We sincerely thank them for their ongoing support.

Community Partners



Corporate Supporters



Community Partners

Community Foundations of Aotearoa NZ (CFANZ)

Hawke’s Bay Foundation is proud to be a member of Community Foundations of Aotearoa NZ (CFANZ). Membership of CFANZ means that our community foundation meets professional standards of best practice. We are community focussed and governed by a local board who continually strive to build a permanent endowment that will benefit our local community. We’re proud to be part of a network of community foundations that have been growing around Aotearoa New Zealand since 2003.

The Tindall Foundation (TTF)

Hawke’s Bay Foundation is proud to be the local funding manager for The Tindall Foundation (TTF). This unique funding model sees regional funding managers throughout New Zealand give out local donations on behalf of TTF. Applications received in our annual funding round are evaluated against TTF criteria and we work closely with them to ensure grants are awarded in line with their key programme areas.

Eastern and Central Community Trust (ECCT)

Eastern and Central Community Trust work in partnership with Hawke’s Bay Foundation to support Hawke’s Bay’s community needs. By collaborating and sharing sector knowledge, we are making better funding decisions for our local charities and community groups.

Craigs Investment Partners

Craigs came onboard as our new investment partner in 2024. They bring together a global market perspective and local understanding into the heart of communities around New Zealand. We look forward to continuing to work with Craigs on growing our endowment fund in the years to come.

Together let's
build a thriving
Hawke's Bay
now and forever.



HAWKE'S BAY
FOUNDATION

(06) 870 4648

info@hawkesbayfoundation.org.nz

www.hawkesbayfoundation.org.nz

[facebook.com/HawkesBayFoundation](https://www.facebook.com/HawkesBayFoundation)

[instagram.com/hawkesbayfoundation](https://www.instagram.com/hawkesbayfoundation)

nz.linkedin.com/company/hawke-s-bay-foundation