



**Trust
Waikato**
TE PUNA O WAIKATO

**SUSTAINABILITY
REPORT**

For the year ended 31 March 2026





TRUST WAIKATO'S VISION IS FOR VIBRANT AND RESILIENT COMMUNITIES

KO TOO MAATOU MOEMOEIA KIA
TIPU, KIA HUA NGAA HAPORI

Cover image courtesy of Sanctuary Mountain Maungatautari, Lucy Schultz
Inside cover image: Waikato Awa, Ngaaruwaahia (with waka taua in the background)

WELCOME HE MIHI

*We acknowledge the creator of all things
May peace cover the land, with goodwill to all
May the calmness come upon the glistening sea
We acknowledge the late Kingi Tuheitia, and Te Arikinui Kuini Nga wai hono i te po
We acknowledge all the tribes and all people who hold the rich heritage
Trust Waikato wishes to acknowledge and greet you all.*

He hoonore he korooria ki te Atua
He maungaarongo ki te whenua
He whakaaro pai ki ngaa taangata katoa
Kia whakapapa pounamu te moana
Kia tere te kaarohirohi i tou huarahi
E whai whakaaro ki too taatou Kiingi a Tuheitia,
E takoto ana ki te maunga o Taupiri
Ka ara ake Te Arikinui Kuini Nga wai hono i te po
E noho ana i te ahurewa tapu o ngaa maatua tuupuna.
Ki a koutou o ngaa waka, ngaa mana me ngaa maunga koorero
Kei te mihi atu Te Puna o Waikato ki a koutou,
Teenaa koutou, teenaa koutou, teenaa koutou katoa.

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HIGHLIGHTS FOR THE YEAR



**120% OFFSET
EMISSIONS TO BE
CARBON POSITIVE**



**PUBLISHED OUR FIRST
STEWARDSHIP
PRACTICE REPORT**



**28% REDUCTION
IN OPERATIONAL
EMISSIONS**



**ATTENDED THE
INDIGENOUS WELLBEING
CONFERENCE**



**\$660,995
ENVIRONMENTAL
GRANTS**

ABOUT US | MOU MAATOU

Trust Waikato | Te Puna o Waikato is one of 12 Community Trusts across Aotearoa, supporting the wellbeing, aspirations, and resilience of the Waikato region. Operating under the Community Trusts Act 1999 and guided by its Trust Deed, the Trust exists to empower communities where support can make the greatest difference.

Established in 1988 through government legislation, the Trust was originally formed to hold and manage shares in Trust Bank Waikato. Following the sale of those shares in 1996, the proceeds were invested into a globally diversified investment portfolio, creating a long-term funding base for the Waikato. Through careful stewardship, the Trust continues to grow and protect this capital for the benefit of generations to come.

Every year, a portion of investment returns is distributed through grants to community organisations, initiatives, and projects. Since inception, the Trust has contributed over \$325 million in funding, helping to fulfil the dreams and aspirations across our region.

Guided by our strategic plan and Ngaa Pou Rautaki, the Trust is committed to supporting transformational outcomes for people, whaanau, and communities.

Our vision is for vibrant and resilient communities, supported by our mission to invest wisely, grant effectively, and operate with flexibility and purpose.



OUR STRATEGY | TAA MAATOU RAUTAKI

Trust Waikato's current strategic plan has guided our mahi and aspirations over the past decade. Grounded in transformational change, it has focused on supporting people, whaanau, communities, and places where the need and opportunity for impact are greatest.

Through this strategy, we have shaped our funding priorities, grantmaking approach, and commitment to understanding the difference our investments make. It has ensured our efforts remain focused on the outcomes that matter most to the communities we serve.

Following extensive engagement across the region, we have developed a refreshed strategic plan that will be launched later in 2026, setting the direction for the next chapter of the Trust's journey.

At the heart of this work is our purpose to uplift and strengthen the region by supporting organisations and initiatives that build resilient, connected, and thriving communities.

STRATEGIC PILLARS | NGAA POU RAUTAKI

Trust Waikato’s four **Ngaa Pou Rautaki** articulate our vision and commitment to vital kaupapa:

TE TIRITI O WAITANGI

Acknowledging Maaori as tangata whenua and their mana as kaitiaki of te Taiao and the people.

EQUITY

Embracing diversity and inclusion to help ensure equity for every person in our community.

SUSTAINABILITY

Trust Waikato’s commitments towards enabling a low-emissions future.

IMPACT

Fostering an environment of learning to help us respond to our communities’ needs and aspirations.

Our Ngaa Pou Rautaki focus our work on achieving greater intergenerational outcomes for our whenua and our people.

These pou reinforce our commitment to ensuring our granting in communities reaches those who need it most. They also help guide our investment approach and operational outcomes.

While each pou has its own focus, they are interconnected, and progress in one area contributes to a positive outcome across all.

ABOUT THIS REPORT | MOO TENEI PUURONGO

This report shares how sustainability informs the way Trust Waikato invests, grants, partners, and operates. It highlights our progress, challenges, and ongoing commitments as we work to strengthen environmental, social, cultural, and economic wellbeing across the Waikato region.

We take a long-term approach to creating positive outcomes for current and future generations. We recognise that environmental stewardship, community wellbeing, cultural identity, and economic resilience are interconnected, and that lasting change requires collaboration, learning, and shared responsibility.

Since establishing our operational emissions baseline in 2019, we have continued to

strengthen our commitment to climate action, equity, accountability, and responsible stewardship. This includes, where possible, measuring and reducing our operational emissions, embedding responsible investment practices, supporting community-led environmental initiatives, and advancing equitable outcomes through our funding and partnerships.

The achievements highlighted throughout this report are the result of collective effort. We acknowledge and thank the community organisations, iwi, and stakeholders who continue to work alongside us to create positive change.



Trust Waikato welcomed new Trustees Rangimahora Reddy and Deserae Frisk with a whakatau. January 2026.

OUR COMMITMENTS AND MEMBERSHIPS



CLIMATE ACTION AOTEAROA

Trust Waikato is a signatory to Climate Action Aotearoa - The Funders Commitment on Climate Action, with the aim to accelerate effective responses to climate change to ensure that everyone has access to opportunities arising from the transition to a low carbon economy.



EKOS

The Trust has measured its carbon emissions with Ekos since 2019 and became certified Climate Positive in 2024 by offsetting 120% of our operational emissions.



GENDERTICK

The Trust gained GenderTick accreditation in 2021, recognising our commitment to gender equity and inclusive workplace practices. Delivered by the YWCA, the accreditation assesses organisations across key areas including equal pay, leadership representation, flexible work practices, workplace safety, and inclusive culture. In 2024, our GenderTick accreditation was reassessed to an ‘advanced’ level, demonstrating the Trust’s ongoing commitment.



PARIS ALIGNED INVESTMENT INITIATIVE NET ZERO INVESTMENT FRAMEWORK (PAII)

In 2021, the Trust adopted the Paris Aligned Investment Initiative Net Zero Investment Framework (PAII) and agreed to the Paris Aligned Investment Initiative Net Zero Asset Owners Commitment to support a net zero and resilient future, transitioning our investments to achieve net zero portfolio greenhouse gas emissions by 2050, or sooner.



UNITED NATIONS PRINCIPLES FOR RESPONSIBLE INVESTMENT

The Trust has been a signatory to the United Nations Principles for Responsible Investment (PRI) since 2007. The PRI stands for responsible, sustainable and prosperous investments, which closely aligns with the Trust’s mission to invest wisely, and its vision of vibrant and resilient Waikato communities.



RESPONSIBLE INVESTMENT ASSOCIATION AUSTRALASIA

As a member of Responsible Investment Association Australasia, Trustees and staff of Trust Waikato attend the Responsible Investment (RI) conference every year, participating in RI discussions.



AOTEAROA NEW ZEALAND STEWARDSHIP CODE

Trust Waikato remains committed to the Aotearoa New Zealand Stewardship Code, having become a signatory in 2023. Through this commitment, we continue to strengthen our responsible investment practices, using our influence as an investor to guide effective management of environmental, social, and governance (ESG) risks and opportunities.



OPERATIONS

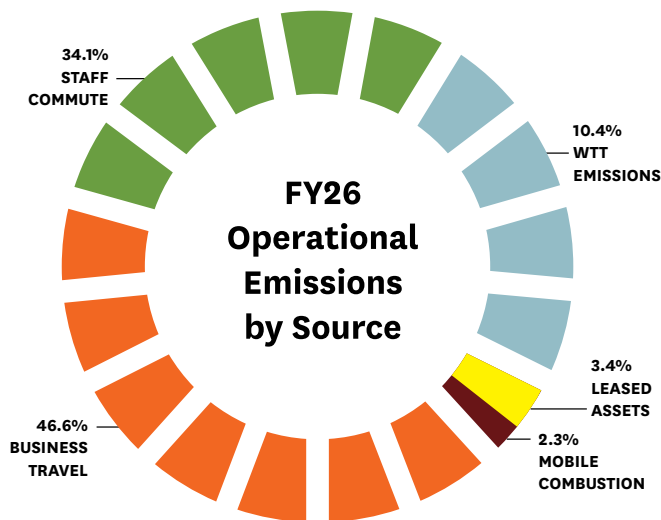
MEASURING OUR OPERATIONAL CARBON EMISSIONS

Trust Waikato is committed to understanding and reducing the impact of our operations. Climate change continues to present significant challenges for our communities, environment, and future generations, and we recognise the importance of taking practical, measurable action in response.

Through annual emissions measurement, ongoing reduction initiatives, and transparent reporting, we aim to strengthen our environmental accountability and uphold our responsibility as kaitiaki of the resources entrusted to us.

In FY26, we continued our partnership with Ekos to measure our operational emissions. The Trust's total operational carbon footprint for FY26 was 34.95 tCO₂e, down from 48.41 tCO₂e in FY25 and below our FY19 baseline of 38.57 tCO₂e. This reduction reflects continued efforts to better understand and manage emissions across our activities.

Our emissions profile continues to reflect the relationship-based nature of our work, with business travel remaining the largest source of emissions. While travel remains important for engaging with communities across the



Waikato region, we continue to seek practical opportunities to reduce emissions.

OFFSETTING OUR EMISSIONS

While reducing emissions remains our priority, some operational emissions are unavoidable. The Trust maintains a Carbon Positive approach by offsetting 120% of its measured operational emissions through certified carbon credits purchased via Ekos.

We support high-quality offset projects that deliver environmental and community benefits, including biodiversity enhancement and sustainable land management. This approach complements our emissions reduction efforts and reflects our ongoing commitment as kaitiaki of the environment.

OPERATIONAL EMISSIONS (tCO ₂ e) by source	FY26	FY25	FY24	FY19
● Business Travel* 46.6%	16.29	27.53	40.74	17.82
● Staff Commute 34.1%	11.94	9.25	4.78	4.60
● WTT Emissions** 1.4%	0.49	5.30	6.16	4.45
● Electricity 10.4%	3.66	3.79	2.96	4.73
● Leased Assets (Trust House) 3.4%	1.20	1.12	1.19	0.73
● Mobile Combustion (Company vehicles) 2.3%	0.81	1.03	1.19	5.37
● Waste 1.5%	0.53	0.37	0.37	0.55
● Stationary Combustion (Ground) 0.09%	0.03	0.02	0.40	0.55
○ Purchased Goods / Upstream Freight 0%	0.00	0.00	0.00	0.02
TOTAL	34.95	48.41	57.79	38.57

*Business Travel includes flights, accommodation and mileage.

**WTT Emissions are created from production and transport of fuel purchased for vehicles and flights.

INVESTMENTS

OUR BELIEFS AND STRATEGY

As a perpetual Community Trust, we take a long term view to financial sustainability to ensure our investment portfolio is structured to consistently meet the current and future needs of our community through reliable funding. Through responsible investment and stewardship, the Trust preserves and grows capital sustainably to ensure intergenerational equity, ensuring current investments benefit future generations.

In an investment market that is constantly changing, and becoming increasingly volatile being a responsible investor is more important than ever. The Trust proactively manages the opportunities, mitigates the risks, and evaluates the impact of investing, particularly in the transition to a low carbon economy.

The Trust’s investment framework is continually refined to enable the highest possible returns at an appropriate level of risk. The investment strategies utilise sound advice and ensure effective governance policy and practice are in place to protect intergenerational equity.

OUR RESPONSIBLE INVESTMENT FRAMEWORK

The Trust Waikato Responsible Investment (RI) Framework is a set of guidelines and policies followed by the Trust to ensure its investments are managed responsibly and sustainably. This framework is implemented, monitored and reviewed at a Trust level, advisor level, and fund manager level, and we consider environmental, social, and governance (ESG) factors in the investment process, analysis, and decision-making. The Trust follows the [United Nations](#)

[Principles for Responsible Investment](#) (PRI), avoiding investments in sectors and activities that harm the environment or society.

The Trust regularly engages with fund managers on ESG issues, risks, and opportunities, and encourages them to improve and disclose their ESG performance and impact. An RI survey is sent to fund managers to assess each investment fund’s purpose, policies, processes, people, products, and portfolio. The survey is updated and implemented regularly to ensure it remains timely, effective and relevant. It demonstrates the Trust’s long-term commitment to RI and sustainability, and recognises the need to address the challenges and opportunities posed by climate change, social inequality, and ethical standards.

The Trust’s engagement philosophy is grounded in collaboration, transparency, and continuous improvement, focusing on fund manager engagement and continuing the learning journey on sustainability. This includes, but is not limited to, carbon intensity measurement and reporting, climate solutions investment opportunities, and stewardship.

All of the Trust’s fund managers have investment policies that include RI/ESG or separate responsible investment/sustainability policies, and these help fund managers make informed decisions that align with regulatory requirements, client expectations, and societal values while also enhancing financial performance. Publicly available RI policies can be viewed by clicking on each manager’s name in the below table.

 LISTED EQUITIES Generation Schroders Devon Mint Northcape	 INFRASTRUCTURE & PROPERTY Morrison & Co UTA IP and PIP Funds Investa QIC Charter Hall	 FIXED INTEREST, CASH & CREDIT PIMCO Bentham Amova	 PRIVATE EQUITY Nuveen
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STEWARDSHIP IN ACTION

In 2023, we became the first Community Trust to sign up to the [Aotearoa New Zealand Stewardship Code](#) (the Code), acknowledging stewardship as a crucial part of our responsible investment activities. In FY26 we were proud to publish our inaugural [Stewardship Practice Report](#), which outlines our Code aligned approach, supported by our strategic plan, existing policies and Ngaa Pou Rautaki.

Trust Waikato views stewardship as more than responsible investing. It is a commitment to using its influence and investments to support vibrant and resilient communities, while preserving and growing capital for future generations. This is demonstrated through our application of the Code’s nine principles.

1. BE COMMITTED

The Trust views stewardship as a core responsibility rather than a standalone initiative. Stewardship is embedded within its governance framework, investment philosophy, and long-term mandate as a perpetual community trust. The Trust’s objective is not only to generate financial returns but also to create positive outcomes for communities, people and the environment.

2. ESTABLISH AND MAINTAIN POLICIES

The Trust supports stewardship through documented policies and governance frameworks that guide investment decision-making, responsible investment practices, risk management, and organisational conduct. These policies are reviewed through the lenses of Te Tiriti o Waitangi, equity, sustainability and impact.

3. INCORPORATE MATERIAL ESG MATTERS

ESG factors are integrated into investment oversight and decision-making, and our Statement of Investment Policy and Objectives (SIPO) includes ESG considerations alongside financial objectives and risk management, recognising that long-term investment outcomes can be influenced by these factors.

4. BE ENGAGED

The Trust encourages active engagement by its investment managers with companies and investment partners. Engagement is seen as an important way to influence better governance, improve long-term performance, and address material risks and opportunities.

5. VOTE RESPONSIBLY

Where voting rights exist within investment holdings, the Trust expects voting to be exercised thoughtfully and in alignment with long-term value creation and responsible investment principles. Responsible voting is viewed as an important stewardship tool for influencing corporate behaviour.

6. MANAGE CONFLICTS OF INTEREST

The Trust recognises conflicts of interest can arise in investment and governance processes. It maintains governance structures, policies and oversight mechanisms designed to identify, disclose and appropriately manage actual or perceived conflicts.

7. COLLABORATE AND ADVOCATE FOR CHANGE

The Trust acknowledges many sustainability, and governance challenges are too large for individual organisations to address alone. Through industry memberships, stewardship initiatives and sector collaboration, the Trust seeks to contribute to broader positive change and improved market practices.

8. MEASURE AND REPORT

Transparency and accountability are important elements of stewardship. The Trust measures stewardship activities and publicly reports on its approach and progress.

9. EDUCATE AND IMPROVE

The Trust views stewardship as an ongoing journey. It aims to continuously strengthen its knowledge, capabilities and practices to ensure its approach remains relevant and effective. Continuous improvement applies across governance, investment management, responsible investment practices and stakeholder engagement.



The Trust recognises that effective stewardship of investment is a journey of continuous learning and improvement, and education and improvement are essential for building a culture of responsible investment and for delivering long-term value to our communities. To support this, the Trust facilitated education sessions for Trustees run by [JANA](#), the Trust’s investment advisor. These sessions provided knowledge and resources to deepen understanding of investment principles and practices, which in turn strengthens awareness of what responsible and sustainable investment looks like. Education also promotes transparency, builds internal capability, and encourages reflection and improvement, ensuring our investment approach continues to align with our values and long-term goals.

LEADING THE WAY IN RESPONSIBLE INVESTMENT

As the global economy increasingly transitions towards a low-carbon future, the Trust partners closely with our investment adviser, JANA, to incorporate climate scenario modelling and stress testing into our investment decision-making. This forward-looking approach enables us to navigate emerging risks and identify new opportunities, while supporting our long-term sustainability objectives. Together, the Trust and JANA contribute to global sustainability discussions, regularly attending and presenting at international forums to promote ethical investment practices and create meaningful, lasting impact.

The Trust is undergoing work to establish a baseline for its investment portfolio emissions, a critical step toward setting an interim Net

Zero target. This foundational work reflects the Trust’s commitment to responsible investment and climate action, ensuring future targets are both measurable and meaningful in driving long-term sustainability outcomes.

LOW-CARBON CHAMPION

The Trust recognises the urgent need to accelerate the transition to net zero greenhouse gas emissions and contribute meaningfully to the goals of the Paris Agreement. To support this, we have adopted both the Paris Aligned Investment Initiative Net Zero Asset Owners Commitment and the Net Zero Investment Framework, reinforcing our commitment to a resilient, low-carbon future by 2050 or earlier.

Carbon metrics play a vital role in understanding our portfolio’s alignment with this transition and allow us to assess and compare our holdings against benchmarks across multiple dimensions - including total emissions, carbon intensity, and fossil fuel exposure. This multi-faceted analysis provides valuable insights into the environmental footprint of our investments and informs our ongoing strategy.

The Trust can access carbon analysis for listed equities through JANA. The table above shows the Trust listed portfolio carbon metrics

The Trust’s carbon emissions, carbon intensity, and fossil fuel involvement are significantly lower than the benchmark, while its involvement in carbon solutions exceeds the benchmark. This indicates that the Trust’s portfolio is substantially surpassing the benchmark in meeting its low-carbon targets.

The Trust’s investment exposure to exclusions in pooled funds are monitored and outlined in the below table.

Exclusions	FY25	FY24	FY23*	FY22	FY21
Fossil Fuels	0.42%	0.69%	0.90%	0.58%	1.04%
Tobacco	0.02%	0.03%	0.03%	-	0.02%
Gaming	0.12%	0.16%	0.12%	0.08%	0.14%
Alcohol	0.29%	0.24%	0.29%	-	0.04%
Armament	0.02%	0.01%	0.01%	-	-
Pornography	0.01%	0.01%	0.01%	-	-
Total Fund Invested %	0.87%	1.14%	1.36%	0.66%	1.24%

* In FY23, the reporting method was improved, which captured a broader range of data, and as such any increases in the reported figures from FY23 and future are attributable to the enhanced reporting method, not to an expansion in restricted investments.

GRANTMAKING

OUR ENGAGEMENT WITH GRANTEES

Trust Waikato continues to support grantees to better understand and respond to environmental sustainability challenges. Interest in understanding carbon emissions has remained strong, with grantees seeking opportunities to build their knowledge and capability.

Between 2019 and 2025, environmental grant funding increased 93% from \$343,500 to \$660,995. During the same period, grant applications for environmental projects increased 79%.

These results demonstrate increasing engagement with environmental sustainability, supported by continued investment in environmental outcomes and growing uptake of climate-related learning and support opportunities.

OUR ENVIRONMENTAL GRANTING AND SPONSORSHIPS

The Trust classifies all grants using the New Zealand Standard Classification of Non-Profit Organisations (NZSCNPO). This framework enables us to better understand and measure the outcomes of our funding, including support for environmental initiatives.

Environmental grants are those with a primary focus on protecting and enhancing the natural environment. Under the NZSCNPO framework, this includes projects focused on conservation,

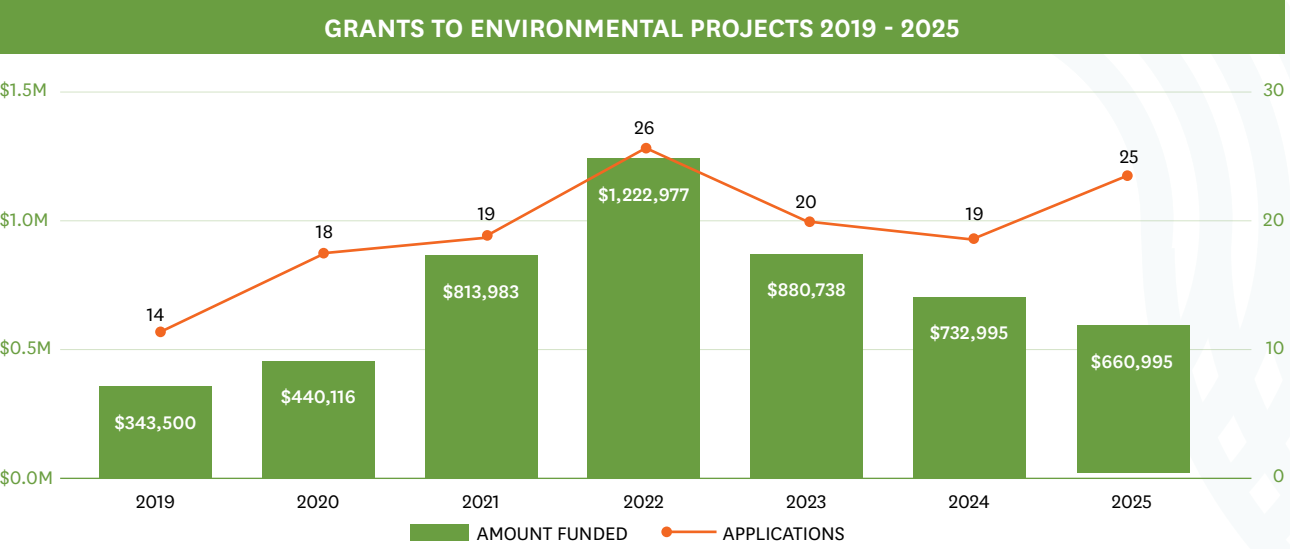
pollution reduction, biodiversity protection, sustainable resource management, and environmental restoration.

The Trust is a signatory to Climate Action Aotearoa and continues to support collaborative climate action across the philanthropic sector through the Community Trusts' Climate Action Working Group (CAWG), facilitated by the Centre for Social Impact.

Through this collaborative approach, community trusts are able to strengthen their response to climate change, share knowledge, and support initiatives that build environmental sustainability and community resilience across Aotearoa New Zealand.

Recognising that environmental impact often extends beyond projects classified solely as environmental grants, the Trust continues to participate in sector-wide work to improve how funders measure and report environmental outcomes across their funding portfolios. This approach provides a more comprehensive understanding of the environmental contribution generated through community investment.

The Trust also contributes to the Kaupapa of National Significance Climate Action Fund (KONS), a Climate Action Aotearoa initiative that brings funders together to support climate solutions at a national scale.



The largest environmental grants approved in 2025 were:

COMMUNITY GROUP	LOCATION	AMOUNT FUNDED
Hamilton	Waikato Environment Centre Trust	\$200,000
Coromandel	Predator Free Hauraki Coromandel Community Trust	\$150,000
Maungatautari	Maungatautari Ecological Island Trust	\$30,000
Te Awamutu	Puniu River Care Inc	\$30,000
Total		\$410,000



CLIMATE RESILIENCE COMMUNITY PROGRAMME

As climate disruption creates increasing challenges for communities across the Waikato, Go Eco’s Climate Resilience Community Programme is helping local groups build their understanding of climate risks and strengthen their ability to respond.

Trust Waikato is proud to fund this initiative, which enables organisations to measure emissions, identify vulnerabilities, and develop practical plans that support long-term sustainability and resilience.

At the heart of the programme is a purpose-built online portal and emissions calculator that turns complex climate information into practical action. Participants receive tailored support

to assess their environmental impact, reduce emissions, and create climate resilience plans suited to the needs of their organisation and community. More than an emissions reduction tool, the programme helps build confidence and capability for a changing future.

During FY26, Go Eco hosted Climate Action workshops in Trust Waikato’s Community Rooms. Trustees and staff attended alongside community organisations and small businesses to learn, collaborate, and share ideas. These sessions fostered valuable connections and demonstrated the power of collective action, taking meaningful steps towards a more resilient and sustainable Waikato.

Image courtesy of Go Eco’s Climate Resilience Community Programme workshop, Trust Waikato Community Rooms.

EQUITY | DIVERSITY & INCLUSION

OUR APPROACH TO EQUITY

Equity remains a core pou of Trust Waikato’s strategy, shaping how we understand need, how we invest and how we work alongside our communities. Our focus is on contributing to a Waikato where all people have the opportunity to participate, belong and thrive, recognising that this requires deliberate effort.

As a regional funder, our approach continues to be informed by the insights we gain through relationships with iwi, community organisations, and stakeholders. We are increasingly conscious that inequities are complex and interconnected, with communities experiencing them in different ways, and that effective responses require targeted action, strong relationships and long-term commitment.

INVESTING FOR INCLUSIVE COMMUNITIES

Through our grantmaking, we continue to invest in initiatives that strengthen diversity and inclusion across the region. This includes supporting organisations that are working to improve access to services and opportunities, enhance cultural connection and identity and enable meaningful participation in community life. Many of these initiatives are locally led and grounded in the lived experience of the communities they serve, reinforcing our commitment to supporting approaches that are responsive, culturally relevant, and community informed.

We also recognise that achieving equitable outcomes is not solely about where funding is directed, but how it is delivered. Over time, we have continued to refine our approach to ensure that our processes, relationships, and decision-making practices support accessibility and fairness. This includes ongoing efforts to build trust with community partners, to listen and learn from feedback, and to work in ways that are enabling rather than transactional.

STRENGTHENING PARTNERSHIPS AND INFLUENCE

Partnership remains an important element of our equity work. We continue to collaborate with others across the region to support shared understanding of wellbeing and inequity in the Waikato. This includes supporting research, data initiatives, and collective conversations that help to strengthen the evidence base and inform more coordinated responses.

By contributing to this broader conversation, we aim to support not only individual initiatives but also the overall capability of the sector to respond to complex challenges. This reflects our belief that lasting change requires aligned effort, shared learning, and long-term relationships.

OUR ORGANISATIONAL PRACTICE

Alongside our external work, we are committed to reflecting these values within our own organisation. Over time, this has included strengthening our policies, supporting flexible working from home arrangements, and continuing to grow awareness and capability across the organisation. We see this as an ongoing responsibility, ensuring our internal practices are aligned with the outcomes we seek to achieve in the community.

During the year, we were pleased to retain our advanced GenderTick accreditation. This reflects a sustained commitment to gender equity and an ongoing focus on creating an environment where all staff feel safe, supported, and able to contribute fully.



INDIGENOUS WELLBEING LEADERSHIP

Our Grants team and Board Chair attended the Indigenous Wellbeing Conference in Brisbane, alongside Indigenous leaders, researchers, and mental health advocates from across Aotearoa, Australia, and the Pacific. The conference offered valuable insights into mental health equity, workforce wellbeing, the digital impacts on health, and community-led approaches to wellness.

Through the knowledge shared, meaningful connections formed, and innovative approaches explored, we have deepened our understanding of the kaupapa, organisations and initiatives we



invest in, strengthening our ability to support community wellbeing and resilience through responsive and impactful grantmaking.



BUILDING CAPABILITY AND LEARNING

We recognise that equity requires continuous learning. As an organisation, we are continuing to deepen our understanding of equity and inclusion, including how these concepts are applied in practice across our work.

This includes strengthening cultural competency, building our use of data and insights, and ensuring that equity considerations are embedded consistently in our decision-making. This work supports more informed investment decisions and strengthens our ability to partner effectively with communities.

Looking ahead

While we have made progress, we acknowledge that this is long-term work. The nature of

inequity is complex, and meaningful change takes time. We expect our approach to continue to evolve as we learn alongside our communities and adapt to emerging needs and opportunities.

Looking ahead, we remain committed to using our resources and influence to support more equitable outcomes across the Waikato. This includes continuing to invest in communities where the need is greatest, strengthening relationships and partnerships, and ensuring that our own practices align with the values we seek to advance.

Through this work, we aim to contribute to a more inclusive, resilient, and connected region for current and future generations.

