



## STRATEGIC PLAN

2017-2019

*Supporting community organisations to achieve a region of vibrant, healthy and caring communities*



Preserve the Community Trust's capital base in real terms while making optimal annual distributions

Distribute Community Trust funds in a fair and effective manner

Maintain Community House, Timaru, as a community support hub



Exercise effective governance and management that reflects best practice

Support non-profit organisations to maintain their long term sustainability



## HOW THE COMMUNITY TRUST WILL ACHIEVE

### **1. Preserve the capital base in real terms while making optimal annual distributions**

- Annual review of the Statement of Investment Policies and Objectives
- Make informed decisions with the appointed Investment Advisor to get the best possible returns from the financial managers
- Encourage all trustees to participate regularly in professional development
- Participate in an Annual Planning day to review current practices and procedures in grant making and investments.

### **2. Distribute Community Trust funds in a fair and effective manner**

- Annual review of the Donation Funding policy, taking into account current social and economic conditions in the region
- Respond to initiatives that address social needs and concerns of the community
- Review donation recipients outcomes to ensure that funding is matched to purpose
- Promote the online application process

### **3. Maintain Community House, Timaru, as a community support hub**

- Maintain the Community House building to a high standard through regular review of the maintenance plan
- Maximise occupancy by promoting benefits and providing an excellent service

### **4. Exercise effective governance and management that reflect best practice**

- Support effective and respectful discussion to encourage innovative and alternative ideas
- Trustees participate annually in a formal Board self-review
- Trustees and Staff to work collaboratively to review the funding trends and Trust investment activities

### **5. Support non-profit organisations to maintain their long term sustainability**

- Understand the needs of the community using available research from Community groups, Government agencies and Local Bodies
- Refer applicants to relevant advice services as appropriate
- Work collaboratively with other funding providers in the region to support new or ongoing projects for community groups