



Community
TRUST
Mid & South Canterbury

OUR STRATEGIC PLAN

2020-2022

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

Adopt best
practice in
governance
and
management

Support non-
profit
organisations
to maintain
purpose and
sustainability

TO ACHIEVE OUR STRATEGIC GOALS, WE WILL

1. PRESERVE THE CAPITAL BASE IN REAL TERMS WHILE MAKING OPTIMAL ANNUAL DISTRIBUTIONS

- Complete an 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.
- Participate regularly in professional development to upskill in investment expertise.
- Maintain granting flexibility for next 12 months factoring in Covid 19 impact and consider a "buffer" to manage response to this impact.

2. DISTRIBUTE COMMUNITY TRUST FUNDS IN A FAIR AND EFFECTIVE MANNER

- Review the Grant Funding policy annually to consider current social and economic conditions in the region.
- Apply agreed funding priorities for next 12 months including:
 - Mental Health resiliency/wellbeing
 - Supporting community groups and events whom/which reinforce and underpin "life as normal."
- Respond to and identify key community needs initiatives to address the needs and concerns of non-profit groups impacted by Covid 19.
- Gather more information and/or undertake research to show impact of funding decisions.

3. ADOPT BEST PRACTICE IN GOVERNANCE AND MANAGEMENT

- Support effective and respectful discussion to encourage innovative and alternative ideas.
- Participate in an annual formal Board self-review.
- Review current funding trends especially from research on impacts of Covid 19.
- Review current investment trends and activities.

3. SUPPORT NON-PROFIT ORGANISATIONS TO MAINTAIN PURPOSE AND SUSTAINABILITY

- Provide multi-year funding to assist in sustainability of viable organisations to assist them to reach their potential.
- Refer applicants to relevant advisory services as appropriate.
- Collaborate with other funders in the region to support new or ongoing community projects and to share community information.
- Collaborate with other funders to provide user-friendly, streamlined funding opportunities for community groups.
- Maintain Community House, Timaru, as a community hub providing low-cost accommodation for non-profits to ensure their long-term sustainability in providing services to the local community.