

**J R MCKENZIE TRUST
TE KĀWAI TORO**

**REPORT OF ANALYSIS OF
EXPRESSIONS OF INTEREST 2006**

**Prepared for
J R McKenzie Trust
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Haemata^{Ltd}

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BOARD PAPER - EXECUTIVE SUMMARY AND RECOMMENDATIONS

BACKGROUND

In response to the outcomes of a strategic review of the JR McKenzie Trust in 2003, the Board established a new programme to improve its contribution to addressing Māori social need. The Board allocated an indicative total budget of \$972,400 for the programme, to be expended over five years (2004-08).

A new funding partnership programme – Te Kāwai Toro (TKT) - was launched late in 2005 to support a few innovative multi-year projects initiated by Māori organisations, groups, whānau or individuals. Projects supported through TKT were to be about promoting and strengthening whānau development.

A call for Expressions of Interest resulted in 169 firm responses by the closing date. From these, the Committee agreed to fund five projects between 2006 and 2009.

ANALYSIS OF EXRESSIONS OF INTEREST

In considering all 169 EOIs the TKT Committee noted that, as a whole, the EOIs contained a rich amount of information about current Māori community aspirations and development priorities and so commissioned this analysis. The aims for this analysis are:

- to find out what the EOIs collectively indicate about applicants' priorities for 'whānau development' and use this to inform relevant audiences
- to consider other possibilities for supporting EOIs or clusters of EOIs
- to note points of interest for future consideration by the Trust.

WHĀNAU DEVELOPMENT PRIORITIES

Geographical Spread

Fourteen percent of EOIs were received from the South Island and 86% from the North Island. In terms of iwi rohe and Rotary districts, the largest representation of EoIs came from Tainui/Hamilton Rotary District.

Project Themes

Three key themes were evident amongst the EOIs: i) provision of social services, ii) cultural/tikanga development and iii) organisational capacity building. Wānanga appear to be the favoured approach for engaging with Māori target groups.

Target Groups

Almost all (153) of the 169 EOIs sought funding for projects that would primarily benefit everyone, by targeting all ages, genders or needs within their target groups. However, a number of projects focussed on a specific age group (eg rangatahi), gender, or need (eg, gambling)

Definitions of 'Whānau Development'

The most commonly mentioned components of whānau development were related to strengthening whānau and their quality of life *as Māori*, specifically through:

- holding wānanga to bring whānau together to convey mātauranga iwi/Māori
- cultural development through learning and practicing tikanga
- preservation of marae
- recording, archiving and making more accessible the stories, traditions, waiata, mōteatea, photographs and other tangible objects from tīpuna lives.

OTHER POSSIBLE SUPPORT

Other JR McKenzie Trust Funding Programmes

Many EOI projects, and the organisations proposing them, appear to be eligible to apply for support under one or more of the other JR McKenzie Trust Funds.

Other Funding Agencies

A number of other avenues of funding support for projects can be identified. Several central and local government agencies offer funding programmes aimed at the three key project themes identified in this analysis.

Most, if not all projects, may also be eligible to apply for funding support from their local Regional Community Trust. In some regions (especially Canterbury, Otago & Southland) these Trusts offer substantial financial support on an annual basis.

Recommendations

It is recommended that the TKT Committee advise each unsuccessful EOI organisation to consider applying for support through another appropriate JRMckenzie Trust Fund, and offer advice in preparing an application or brokering appropriate support relationships.

It is also recommended that the JR Mckenzie Trust use this report to:

- inform national Māori development organisations of the Trust's initiative, and of the themes that have emerged in the 169 EOIs
- explore any opportunities for collaboration in the interests of EOI proposers, and whānau development in general.

BACKGROUND

1. Te Kāwai Toro

In response to the outcomes of a strategic review of the JR McKenzie Trust in 2003, the Board decided to establish a new programme to improve its contribution to addressing Māori social need. The Board allocated an indicative total budget of \$972,400 for the programme, to be expended over five years (2004-08).

As an outcome of consultation and planning during 2004/05, a new funding partnership programme – Te Kāwai Toro (TKT) - was launched late in 2005 to support a few innovative multi-year projects initiated by Māori organisations, groups, whānau or individuals. Projects supported through TKT were to be about promoting and strengthening whānau development.

Māori-led organisations were invited to submit expressions of interest to be considered for a significant amount of multi-year funding for an innovative whānau development project. Applicants were required to be, or on the way to becoming, a charitable trust or incorporated society, or able to be funded 'under the umbrella' of one.

Through TKT, the J R McKenzie Trust was looking for one to three innovative projects to support that:

- developed a new approach to whānau development
- built on whānau strengths

- strengthened whānau
- have practical outcomes
- promote mana whānau
- develop better understanding of whānau
- address whānau issues
- enhance whānau participation in decision making
- establish whānau networks
- provide for long-term sustainability of healthy whānau.

By the deadline of 24 March 2006, the TKT Committee received 169 Expressions of Interest (EOIs). From these, the Committee short-listed six EOIs for further consideration. At the end of May, the following five projects were chosen for significant TKT funding between 2006 and 2009.

Ārai Te Uru Whare Hauora	Otepoti Dunedin	Working intensively with rangatahi and their whānau, including strengthening inter-agency collaboration.
He Korowai Trust	Kaitaia	Maximising the potential of unused and underused Māori land – reconnecting the landowners back to their land.
Maungarongo Pā Trust	Ōhākune	Strengthening connections with and involvement of whānau through co-ordination and website development.
Ngāti Rangiwahakatūria – Whangaehu Marae Committee	Whanganui	Building the strengths of socially disadvantaged whānau, and developing rangatahi leadership skills.
Ngātokowaru Marae Committee	Horowhenua	Supporting rangatahi development through planning, goal setting and linking with mentors from the hapū.

2. Expressions of Interest 2006

The call for EOIs required submitters provide a brief (2-3 page) description of their project, answering the following questions:

- Aims: What are the aims of the project, and results you hope to achieve?
- Location: Where will it be based? What region/s will it cover?
- Duration: How long will the project run? Is it a new or existing project?
- Description: What is the project about? How will the project work? What are the services that it will provide? What results do you hope to achieve?
- Learning: Do you hope to learn anything from the project?
- Beneficiaries: Who will benefit from the project? How?
- Funding: What amount of funding support is needed? What will the funding be used for? Include a basic budget.
- Personnel: Who are the key people involved in the project?
- Partnership: Why should the Trust support this project? How do you see the Trust and your project supporting each other?

In considering all 169 EOIs the TKT Committee noted that, as a whole, the EOIs contained a rich amount of information about current Māori community aspirations and development priorities (whilst also recognising that these EOIs cannot be considered representative of all Māori communities' aspirations). Furthermore, the Committee considered that there might be other ways in which the JR McKenzie Trust and/or other funding agencies could support some of the projects that were not chosen in this instance.

Therefore, the Committee commissioned this report to provide both an analysis of some of the information contained in the EOIs, and recommendations for follow up actions for the Trust to consider.

3. The Brief

The TKT Committee stated three aims for this analysis:

- to find out what the EOIs collectively indicate about applicants' priorities for 'whānau development' and use this to inform relevant audiences
- to consider other possibilities for supporting EOIs or clusters of EOIs
- to note points of interest for future consideration by the Trust.

The specific information requested under each of these aims is listed below.

[A] Applicants' priorities for "whānau development" and use this to inform relevant audiences

'Relevant audiences' might include the Trust, other funders, Te Puni Kōkiri (TPK), the applicants (in part as acknowledgement for their input), Māori communities.

Note any specific definitions given or implied for the term 'whānau development' in the EOIs, alongside those used by the Trust, TPK etc.

The analysis should include quantitative data:

- geographical spread of projects (perhaps by regional authority area, iwi and/or rohe, Rotary district)
- theme/focus of projects – e.g. education, health, whānau reunions, waka ama, recording of history, use of technology, land use, social services, etc
- any focus on a particular target group/s, e.g. age band and/or gender.

[B] Other possibilities for supporting EOIs or clusters of EOIs

Other possibilities might include:

- Other J R McKenzie Trust funding programmes
- Other funding agencies and government agencies with relevant interests – for example, Ministry for Culture and Heritage, National Library, National Archives, Radio & Film Archives, TPK and Te Papa

The analysis should both suggest avenues where individual EOIs might seek alternative support, and identify clusters or themes for which the Trust might seek support. For example, a number of EOIs came from groups wishing to establish or expand a waka ama group; there might be a role (for the Trust and/or others) to support the waka ama movement at a national level, rather than to support individual groups, and/or to work with SPARC, Ministry of Health etc.

[C] Note points of interest for future consideration by the Trust.

In addition to 1 and 2 above, note any information of relevance to the Trust and the Te Kāwai Toro Committee. For example, there may be issues raised that the Trust may wish to address in the future.

4. Method of analysis

Raw data from each code-numbered EOI was entered on to Excel using the following column sub/headings:

- Location (town/city, Rotary District, iwi rohe)
- Target groups (wāhine, tāne, rangatahi, high needs Māori, Māori structures, and extra notes)
- Themes/foci (education, wānanga, health, reunions, waka ama, other sports, archiving heritage, social services, strategic management, business development, resource development, cultural development, and comments)

- Definitions of whānau development.

Graphs were then produced to summarise an analysis of location/geographical spread, target groups, and themes/foci. Definitions of whānau development were grouped into common themes.

Through the collective knowledge of the Haemata Ltd team, other possible funding and related support for the EOIs' projects were identified, and issues and points to note listed. A more detailed analysis of other possible funding sources could be conducted with detailed reference to key funding guides¹ and analysis of possible sponsorship interests.

¹ For example, funding guides available (in addition to the JR McKenzie Trust sources) include the websites of NZ Funding Information Service www.fis.org.nz, Philanthropy NZ www.philanthropy.org.nz, Community Net Aotearoa www.community.net.nz, central government agencies www.govt.nz, and the *Tapping into Funding Resources He Rauemi Resource Guide 2* for the arts and heritage sector published by Te Papa National Services Te Paerangi www.nationalservices.tepapa.govt.nz

WHĀNAU DEVELOPMENT PRIORITIES

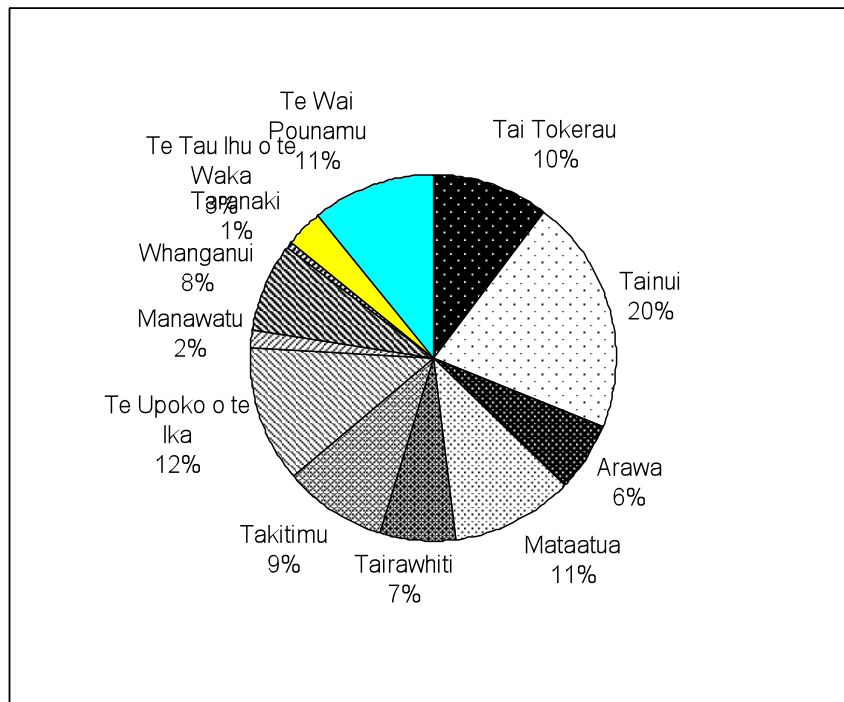
1. Geographical Spread

Fourteen percent (14%) of EOIs were received from the South Island and 86% from the North Island. This geographical spread was analysed by iwi rohe and by Rotary District.

By iwi rohe²³

As shown in Graph 1, approximately 20 % (n=37) of the 169 EOIs were received from the Tainui rohe in the Waikato-South Auckland area.

Graph 1 – EOIs by iwi rohe



By Rotary district

Given that the JR McKenzie Trust structure is related to Rotary Districts, the geographical spread of EOIs was also analysed by Rotary District (see Graph 2 below).

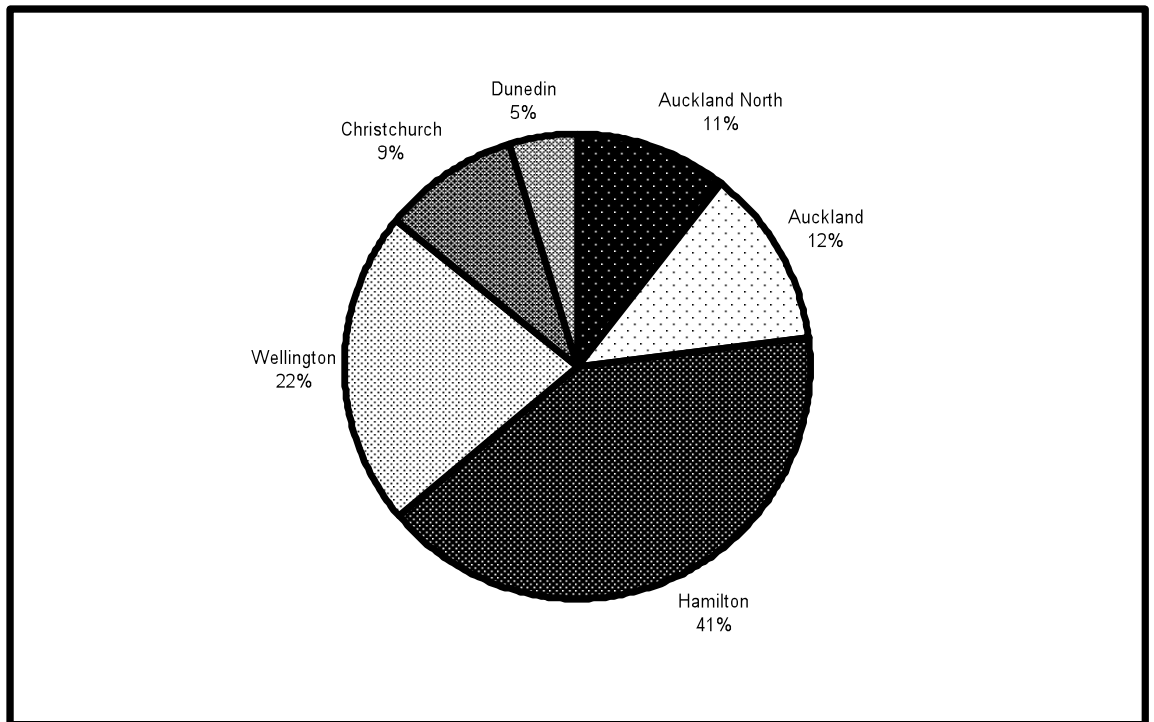
Forty-one percent (41%, n=69) of the 169 EOIs were received from Hamilton Rotary District (south of Pukekohe to Tūrangi, and from Taumarunui to Waipukurau).

Twenty-two percent (22%, 37) were from the Wellington District (remainder of southern North Island); 12% (21) from Auckland (south of Auckland harbour bridge, Avondale and east Auckland, and south to Pukekohe); 11% (18) from Auckland North (West Auckland and north of Auckland harbour bridge); 9% (16) from Christchurch (including and north of both Ashburton and Fox Glacier); and 5% (8) from Dunedin Rotary District (remainder of South Island plus Rakiura).

Graph 2 – EOIs by Rotary District

² TAKOA, Te Aka Kūmara o Aotearoa – a directory of Māori organisations and resource people was used to guide the allocation of hapū, iwi or Māori organisations into iwi rohe (regional iwi groupings).

³ Six EOIs were submitted from organisations representing two or more rohe, thus the total number upon for this particular analysis is more than 169.



2. Project Themes⁴

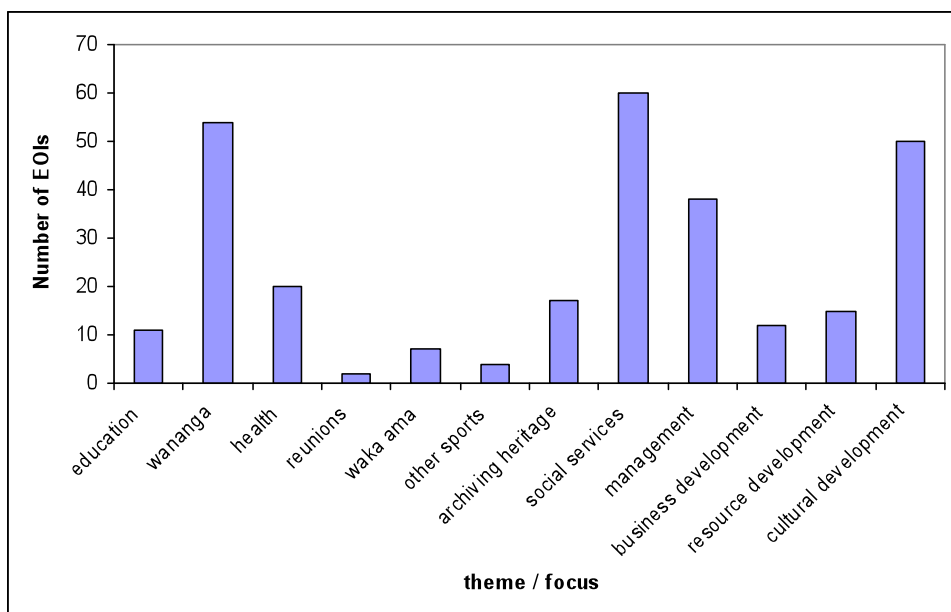
As shown in Graph 3 below, three key themes were most prevalent amongst the 169 EOIs, namely projects with a focus on:

- providing a social service (60)
- cultural / tikanga development (50)
- organisation capacity building through strategic management (38).

Wānanga (educative hui) was clearly a preferred approach for engaging with Māori target groups with fifty-four (54) projects seeking to bringing whānau/Māori together, usually on a marae, to focus on addressing a particular issue/need (eg male violence) and/or to increase participants' knowledge of tikanga and /or mātauranga Māori (eg reo ā-iwi, tikanga, kōrero, hītori, whakapapa, whakairo, kapahaka).

Graph 3: Project themes/foci

⁴ Many projects had two or more foci/themes, and were thus entered in more than two theme/foci categories (as defined in the following pages). For example, a project aimed at developing rangatahi as self-directed learners in schools able to blend career and sporting passions, growing leadership, and enhance whānau participation in students' lives and engagement with their teachers through activities such as individual planning; whānau meetings; linking teachers, students and whānau; sports; events; tikanga, wānanga and tours. Thus this was entered under four themes: education, wānanga, other sports, cultural development.



Social services

Included amongst the social services category were 60 projects focusing on strengthening whānau through the following range of activities:

- strategic management/organisational capacity building to identify social needs and develop or improve social support and/or health services in general
- anti-violence/domestic violence programmes
- developing support systems for families: i) in particular circumstances eg war veterans, education/activities centers for teen parents or de-enrolled rangatahi, reuniting youth in CYFS care with their whānau, problem gamblers, pakeke/kaumātua, disabled, parents of under 5s, or ii) with high needs in general
- positive parenting programmes
- healthy lifestyle / healthy eating programmes for families or rangatahi
- strengthening social systems and /or self-development through kaupapa Māori (including mahi whakairo, taiaha wānanga, marae performing arts)
- housing initiatives.

Cultural development

Projects with a cultural development theme (50) involved supporting participants to practice tikanga Māori/ā-iwi, with some of the projects also including an outcome of learning and preserving mātauranga Māori/iwi/hapū/whānau.

Strategic management / organisation capability building

'Strategic management' is the broad term used to categorise projects with a focus on developing organisational capability either as a primary or secondary outcome. Some 38 projects fell within this category covering the following activities:

- organisational needs identification
- strategic planning
- short-medium term business planning
- improving management and operating systems.

Health

The 20 projects with a focus on improving whānau health commonly sought to develop programmes to promote healthy lifestyles, including healthy eating and activity. In many instances these projects were associated with existing or proposed iwi/Māori health services, and included a social services

and/or community education focus. Specific health problems, if mentioned, included diabetes, cardiovascular disease, and mental health issues.

Archiving heritage

The 19 projects that focused on initiating or improving heritage archives included archiving and/or recording stories, whakapapa, mātauranga Māori, mātauranga rongoā (traditional medicines), traditional songs and chants, waiata, mōteatea, and photographs.

Business / economic development

The 12 business and economic development projects included initiatives such as:

- development of land & natural resources, including through horticulture or gardening
- a housing initiative (providing whānau housing & sustainable income)
- a collective initiative of seven marae to develop strategic plans and become economically sustainable
- renovation of a marae for tourism development (& a hauora clinic)
- development of local television station.

Sports development

Eleven (11) projects included a focus on sports development, seven (7) of which involved waka ama activities. Some of these were to help the waka ama club to develop, others to provide programmes for high needs young people (eg tamariki with mental health issues).

Education

The category of 'Education' encompassed projects that focused on rangatahi as students in the *formal* education system and the engagement of teachers and/or whānau with rangatahi to enhance their education performance and general well being as Māori. Eleven (11) projects came under this category.

Resource development

Fifteen projects aimed to develop a tangible resource as one of the stated outcomes. The range of resources included websites, databases, waiata learning resources, photograph exhibitions or films.

Just over half (8) of these projects were also archiving heritage projects. Three of these eight heritage projects also included a third category of social service, wānanga, cultural development or strategic management/organisational capacity building.

Three resource development projects were also had a second focus of cultural/tikanga development, one through wānanga and another through strategic management/organisational capacity building.

Two resource development projects were also focusing on providing a social service and two were business/economic development projects.

3. Target Groups

Holistic, mixed groups

Almost all (153) of the 169 EOIs sought funding for projects that would primarily benefit everyone, by targeting all ages, genders or needs within their target groups. However, while some were holistic in one aspect (eg, age), they may have also been specific in another aspect (eg, gender).

Age-specific

As depicted in Graph 4 below, the largest age-specific group identified in the projects was rangatahi (youth) with twenty-eight (28) projects targeting this group and their whānau, and one (1) specifically targeted the needs of pakeke/kaumātua.

Gender-specific

Only sixteen (16) projects were designed to benefit gender-specific target groups. Of the gender-specific projects:

- eight (8) specifically targeted wāhine and eight (8) tāne
- six (6) were designed to address issues of violence - three focusing primarily on working with tāne to address violence issues, and three projects working primarily with wāhine
- four (4) projects included a focus on self-development and/or empowerment outcomes for wāhine, and three (3) for tāne
- one (1) focused on working with wāhine experiencing problem gambling issues
- two tāne-specific projects focused on mahi whakairo as an activity to promote self and/or cultural development, one (1) of which was aimed at ex-prisoners.

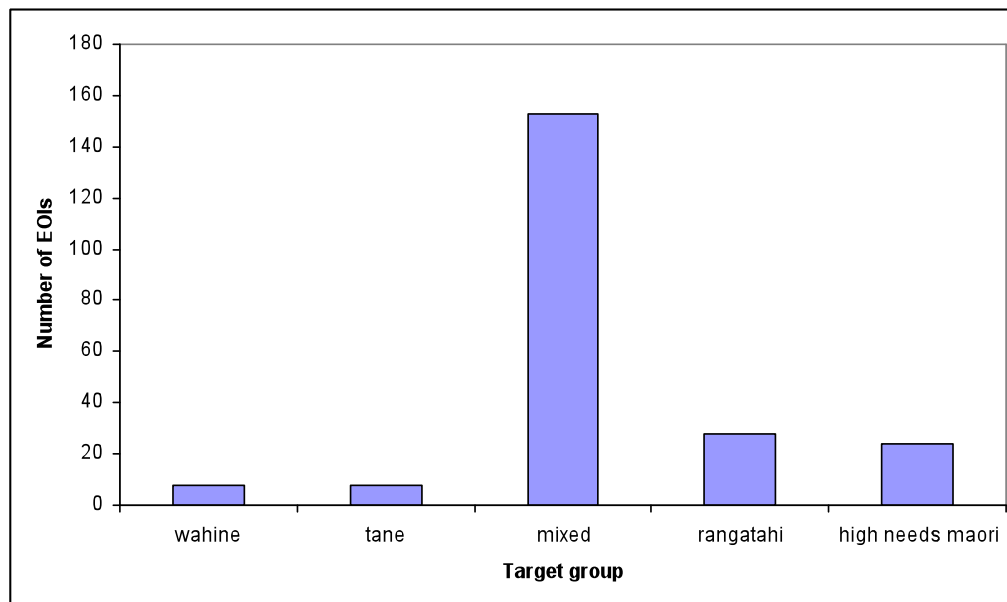
High needs

Twenty-four (24) projects targeted Māori groups with high needs. All but five (5) of these projects were also targeting mixed gender and mixed age groups.

The 'high needs' identifiable in the projects included:

- general social support
- self development
- vulnerable families
- victims of violence
- problem gamblers
- safe-driver education.

Graph 4: Target groups x gender, age, needs



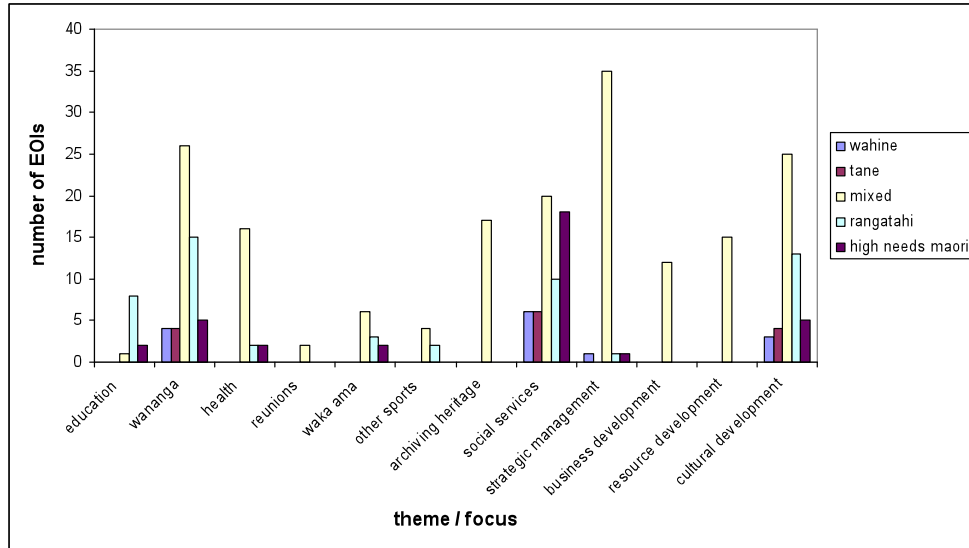
Target Groups and project themes

Some of the projects with a social services, cultural development and/or wānanga component (see Graph 5a below) targeted specific groups – specific age, gender or high needs groups - as well as mixed groups of people.

Interestingly, no heritage/reunion, resource development and business development projects specified a particular target group.

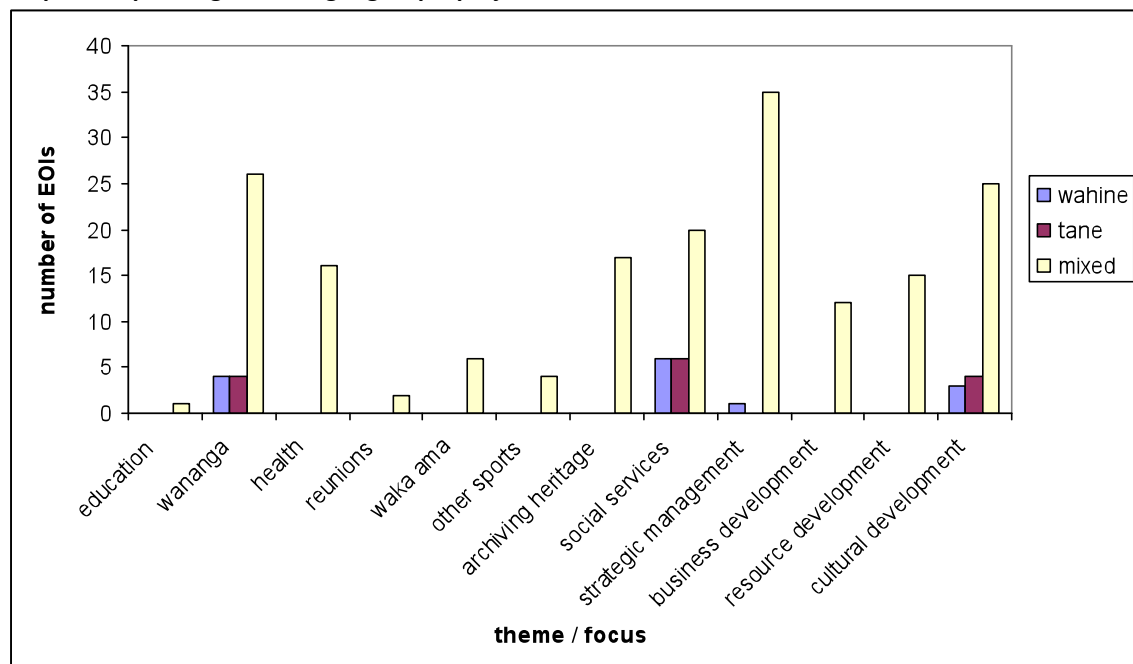
The needs of rangatahi / youth were specifically targeted through education, wānanga, health, waka ama / other sports, social services, strategic management, and cultural development-focused projects.

Graph 5a: Target group (gender, age, high needs) x project themes/foci



Furthermore, as shown in Graph 5b below, specific needs of either wāhine or tāne were addressed through projects with a social services, cultural development and/or wānanga component. One strategic management project aimed to build the organisational capacity of a wāhine-specific organisation.

Graph 5b: Specific gender target group x project themes/foci



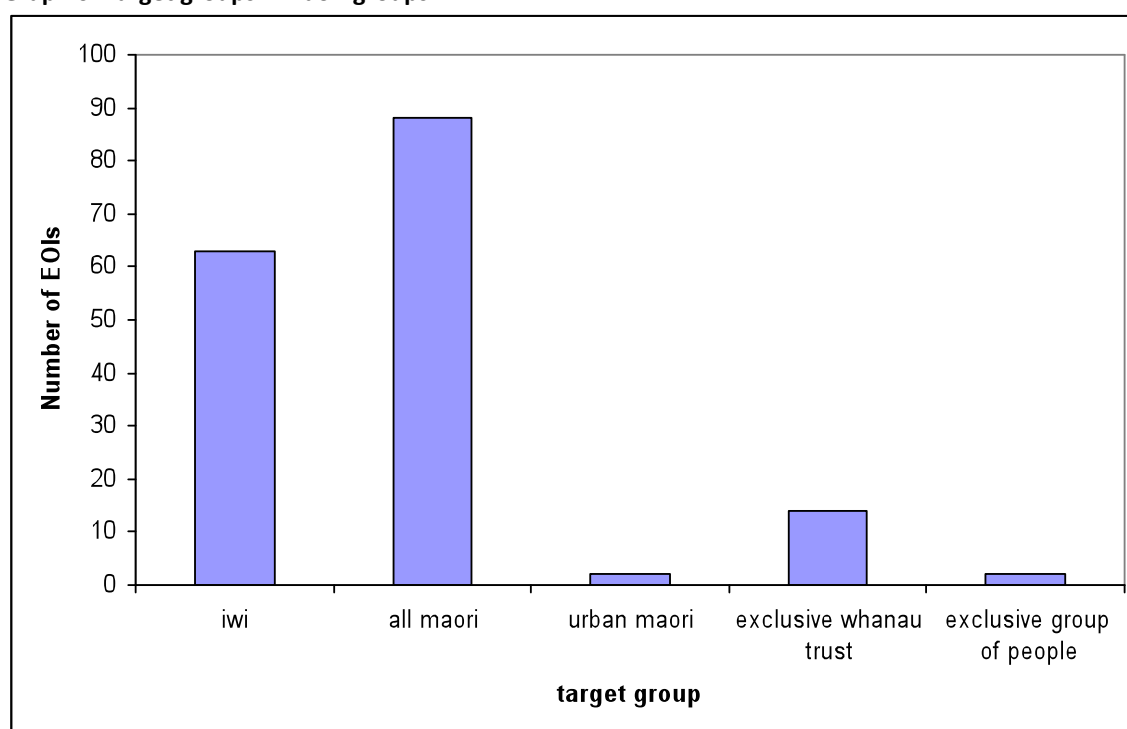
Targeted Māori groups

Another way to analyse target groups is by looking at the scope of Māori organisations/groups to benefit from the project.

The majority (151) of the 169 EOIs targeted all Māori (88) or all members of an iwi (63).

A small number were to target members of a specific whānau trust (14), a specific group of urban-based Māori (2 - eg Ngāti Porou in Auckland), or an exclusive pan-iwi group (2 - ie, Vietnam veterans and their families, or ex-prisoners).

Graph 6: Target groups x Māori groups



4. Definitions of ‘Whānau Development’

Overall, EOI projects aimed to strengthen their whānau and whakawhanaungatanga, and thus, to improve the quality of life of Māori through a wide range of initiatives and services as indicated in the project themes and target groups. Durie 2001⁵ and Hui Taumata 2005 defined the three key goals of Māori development as being able to live: as Māori, as active citizens of the world, and with both good health and a high economic standard of living. These three goals are reflected in the concepts of whānau development within the EOIs received.

The most commonly mentioned components of whānau development were related to strengthening whānau and their quality of life *as Māori*, specifically through:

- holding wānanga to bring whānau together to convey mātauranga iwi/Māori
- cultural development through learning and practicing tikanga
- preservation of marae
- recording, archiving and making more accessible the stories, traditions, waiata, mōteatea, photographs and other tangible objects from tīpuna lives.

Another cluster of projects suggests that a key component in whānau development is related to improving quality of life by achieving good health and a high standard of living, as well as opening

⁵ Durie, M. A Framework for Considering Māori Educational Advancement, 2001 www.moh.govt.nz

doors to actively participating as citizens of the world. These projects were aimed at developing whānau through identifying and addressing social, education, housing and health needs. The issues mentioned most frequently were associated with violence (especially domestic violence) and the need to develop healthy lifestyles, including healthy eating and outdoor activities – especially through sports, particularly waka ama. Many projects focused on building the strengths of individuals to enhance their educational and other achievements and self esteem as Māori (eg, self development and leadership programmes for rangatahi, non-violence programmes for men, and initiatives to empowering women). A few projects included economic development or sustainable income generation as an explicit component of whānau development.

Developing the capacity of organisations to plan and operate strategically and efficiently was also a key component associated with whānau development across both these clusters of projects. A range of organisations was listed – whānau (informal and those formed into trusts), development trusts, marae, Māori development, social and health services organisations, and a few associated with business development/income generation.

PROJECT SUPPORT AND STRATEGIC PARTNERS

1. JR McKenzie Trust Funding Programmes

In addition to Te Kāwai Toro, the JR McKenzie Trust funding programmes also include the:

- Regional Fund
- Innovative Fund
- Chairs Fund
- National Fund

Common across these Funds the Trust does not generally make grants to: individuals, sporting groups, schools and early childhood centres, out-of-school care programmes, rest homes and hospitals, environmental groups, festivals, disaster relief organisations, well-established and uniformed youth groups, or groups whose main purpose is to promote a message rather than provide a service (including religious groups).

Also, the Trust does not make grants towards: the purchase of land or buildings, building alterations, overseas travel, capital funds for loans, scholarships, grants etc; the purchase of food by food banks or projects already completed. Most of the Trust's grants under these Funds are made to medium-sized and small community organisations, with an annual turnover of less than \$10 million and less than two years' running costs available in untagged reserves.

Many Te Kāwai Toro EOI projects, and the organisations proposing them, appear to be eligible to apply for funding support under one or more of the other JR McKenzie Trust Funds.

The **Regional Fund** makes grants to organisations that operate in one area of the country only, and are NOT part of a national structure, thus whānau, hapū or iwi trusts may qualify. To take two examples from the EOI pool, the following two projects – amongst others - could be encouraged to apply to the next round of the Regional Fund⁶:

EOI 30	Kanihi Umutahi	\$4,500 per year x 2 years	Wellington Region
EOI 99	Kaputaki Marae	\$3,000	Waikato

Through its **Innovative Fund**, the Trust has set aside some funds to support new, imaginative and creative ways to address social problems. The boundaries of this programme have been deliberately left fairly open. Multi-year funding commitments are occasionally made, thus some EOI projects (for example, EOI 58 Kōkiri Marae, seeking \$10,000) may qualify to apply under this Fund. Examples of projects that might be considered include: a new programme in one part of the country that might have potential elsewhere, a programme with a strong preventative aspect, partnerships involving two or more organisations – some of which may be from outside the community sector, and action-oriented research.

The **Chairs Fund** is a very small fund that allows the Trust to react quickly to situations where it is not easy to wait for the next funding round. EOI 99 from Kaputaki Marae, seeking \$3,000, may also be eligible for this support, amongst some other EOIs.

Finally, the **National Fund** makes grants to the national offices of organisations that have a national structure (for example that have branches or affiliates providing services around the country), the only office/base of an organisation that provides a nationwide service or has a national focus. In most cases, these grants are used for either running costs for the national office and/or the network, or activities aimed at supporting the work of local groups - for example training, newsletters, information, publicity etc. There is no maximum amount. Last year the average grant was \$13,000, and very few were more than \$20,000. Very few, if any, EOIs would fit this Fund.

⁶ Closing dates for the Regional Fund are 28 February and 31 May, and an organisation may apply only once each year.

However, the TKT Committee might consider approaching some EOI proposers whose project fits with the focus of a relevant national organisation (eg NZ History Group, oral History Association, Women's Refuge, Problem Gambling Foundation) to discuss the possibility of the Trust assisting with brokering a relationship with that national body.

It is recommended that:

the TKT Committee advise each unsuccessful EOI organisation to consider applying for support through another appropriate JRMckenzie Trust Fund, and offer advice in preparing an application or brokering appropriate support relationships.

2. Other Funding Agencies and Potential Strategic Partners

The themes evident in the whānau development projects proposed in these EOIs reflect all three key goals of Māori development, and thus fit the foci of Māori (national and iwi/hapū) government and non-government development agencies - for example: Te Puni Kokiri, Federation of Māori Authorities (FoMA) Te Matarau (Māori Development Organisations Assn), Poutama Māori Business Trust.

Each theme also fits under of at least one programme provided by specific central and local government agencies, and the priorities of some non-governmental organisations and trusts. Some, but not all, of these programmes offer funding support.

All projects may also be eligible to apply for funding support from their local Regional Community Trust. In some regions (especially Canterbury, Otago & Southland) these Trusts offer substantial financial support on an annual basis.

Table 1 below, provides a summary of some of the other possible government and non-government financial support and /or strategic partner support that could be explored with, and behalf of, thematic clusters of EOIs.

It is recommended that the JR Mckenzie Trust use this report to:

- inform national Māori development organisations of the Trust's initiative, and of the themes that have emerged in the 169 EOIs
- explore any opportunities for collaboration in the interests of EOI proposers, and whānau development in general.