

the power of love



The Journey of the Rua and Clarrie Stevens Charitable Trust



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The Journey of the Rua and Clarrie Stevens Charitable Trust

by Lee Stevens

Edited by Susan Buckland



THE POWER OF LOVE

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Cover photographs: Clarrie and Rua Stevens (above); Lee and Penny Stevens (below).

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Prologue

The Rua Stevens Charitable Trust was named for a loving wife and mother who lost her life to leukaemia at the age of 60. In the months following her death her devoted husband, Clarrie Stevens, resolved to honour her memory with a trust. Its purpose would be to support the arts and young people, as Rua had done for much of her life.

There was little money to invest in the newly established Rua Stevens Charitable Trust. But Clarrie was undeterred. A hard-working lawyer who was held in high regard in his hometown of Dunedin for his generous character and astute mind, he set to work to build the Trusts' assets.

From the outset, Clarrie had the enthusiastic support of his 22-year-old son, Lee. Together they tackled the challenges and opportunities on the road ahead. And having started with only a modest amount of capital to invest in the Trust, they managed to almost double it within five years. The Rua Stevens Charitable Trust gradually grew stronger and began to stand out from the crowd for its genuine interest in the progress of its grant recipients.

By the time of Clarrie's death in 1995, the Trust inspired by his community spirited wife had been able to make modest grants almost every year since its inception. Lee renamed the Trust to include his father's name alongside that of his mother, and aided by his wife, Penny, he applied renewed energy to the Trust's purpose of helping others.

Opposite: Clarrie and Rua.

From small beginnings, the Rua and Clarrie Stevens Charitable Trust has now been providing support for half a century and not only to the arts but also to education and the community. To date, at least \$1.754 million in grants have been distributed. A proud record for the little trust with a big heart.

Lee hadn't envisaged the Trust would become his life's work when he set out 50 years ago to help his father build it from the ground up. But he has no regrets. The hands-on journey to fulfil the objectives of their charitable trust opened new horizons for its beneficiaries and for its trustees.

In 2016 Lee received the New Zealand Order of Merit for his services to the community and immediately paid tribute to his wife Penny for her unstinting support and drive. Together, they have ensured that the Trust will continue to lend the warm-hearted helping hand it has extended all these past years.

Lee takes up the story as he looks back over the years to where it all began.



Lee and Clarrie at home in Dunedin, 1984.



Birth of the Trust

After my mother had died of illness, I asked my father what life was all about – a loved one dies and we all just move on? My father replied that he, too, had these thoughts and asked how I felt about helping him establish a memorial trust. I was a naive 22-year-old and knew little about charitable trusts and the world of philanthropy. But I was excited about the idea honouring her memory in a tangible manner. And I shared my father's wish to establish a fund that would support my mother's community interests. She was such a vibrant person. Her love of life filled our home. My parent's marriage had been a happy one and they shared a desire to be of service to others. Her loss was devastating to him.

My father was determined to make grants from day one. He was 63 at the time and while he was alive, he wanted to ensure that Rua's community interests would benefit from her memorial trust. However, we were not able to kick-start it with a sizeable donation. The task in hand was to build up a sustainable fund from scratch. Little did we appreciate, at the time, that it would take us nearly 20 years to create a reasonably sized fund. In hindsight it was probably just as well that I didn't know.



Rua

Rua Stevens (née Frapwell) was born in Dunedin, which would be her home for most of her life. She was educated at Archerfield School where, as a prefect in 1929, the students voted her winner of the Fergus Memorial Good Comrade Ring. Her lifelong love for the arts began at school with the encouragement of her teachers.

A keen sportswoman with a wonderful sense of humour, she became known for her vitality, her sense of fun and caring nature. Rua always took a special interest in the welfare of children and chose to be a kindergarten teacher. She was also a leader in the Girl Guides movement and was later invited to be the Commissioner for Otago, a position she declined, to focus on her young family. In 1938 she married a young lawyer, Clarence Henry Somerville Stevens, and continued her kindergarten teaching until the arrival of her three children.

Rua was a devoted mother and a loyal supporter of her husband. In later years she was President of the Andersons Bay Kindergarten and led its fund-raising activities.

Tragically, she was incorrectly diagnosed when she became ill with leukaemia and was never treated. Yet she never complained. She died on 12 July 1970, aged 60. My father would survive her by exactly 25 years.

Following Rua's death my father was severely strained by family

Opposite: Rua in her 20s.

discord with my adopted siblings over family assets. In one case it took some years to resolve, and I felt distraught about the disintegration of our family that had meant so much to Rua. It became crystal clear that she had been the glue holding her family together. The sorrow of all this made me determined to honour her memory in an enlightened way.

The Trust Deed was signed on 20 September 1970. I had been enjoying my job with a trust company at the time. However, I didn't hesitate when Clarrie asked if I would be prepared to leave the job to help him grow our new Trust. He still had the responsibilities of his law practice. My life then progressed in an unanticipated direction. And I didn't look back.

Clarrie and I agreed our guiding philosophy should be more than



Making friends during travels in the USA.

writing cheques. We wanted to be friends of the organisations we supported, an approach that characterised our Trust from its earliest days.



Rua and 16-year-old Lee.



Clarrie

From the start of his legal career Clarrie intended to help people who were under privileged. He had experienced hardship himself. He was born into a poor family and his father died when he was young. Clarrie and his brother went out to work to support their mother and two sisters. As a young law student, he put himself through Otago University, working by day in a law office and studying in the evenings. Life at this time was particularly challenging because of the Great Depression of the 1930s. Clarrie had no money when he decided to study for a law degree. A law lecturer offered to give him free tutorials if Clarrie agreed to do free legal work for those who were unable to afford the fees. That was fine with Clarrie.

He began his legal career with a Master of Laws with First Class Honours and his firm belief that he had a duty to look after the disadvantaged. He was first employed in the firm of Barrowclough Ramsay Haggitt and worked under Harold Barrowclough, later a Chief Justice of New Zealand and knighted for his services to the law. Clarrie told me that he gained invaluable legal training in the firm.

Characteristically, he remained more interested in helping others than pushing himself forward. It was years after the 1954 publication of the 1st Edition of Neville's Law on Trusts that he told me he had co-

Opposite: Clarrie at his graduation with a Bachelor of Law in 1931. He went on to graduate three years later with an LL.M. (Hons).

written it. He had declined to have his name on it. The publication has been a key reference text for students at Otago University and they still use it today. The 13th edition, the most recent, was edited by Dr Lindsay Breach and published in 2018.

I recall another incident in the 1960s when Sir Leonard Wright, a businessman and long-standing mayor of Dunedin, chaired a share market float of the city's Southern Cross Hotel. He died not long after. Clarrie had done the legal work for the float and in lieu of his fee, he asked the Board if a portrait of his good friend Sir Leonard be hung in the hotel lobby in recognition of his achievements.

As part of his law degree Clarrie studied philosophy. He used to share with me his knowledge of the great Greek philosophers, whom he admired, particularly the ethos of service to others. He liked Socrates' view that the greater well-being of society could be achieved through an ethical system based on human reason rather than theological doctrine, and that choice was motivated by the desire for happiness.

He also admired Aristotle, who taught that civilisation revolved in cycles of autocracy, monarchy, democracy and hedonism. And that history showed societies were their most content when looking after each other.

After delving a bit more into Aristotle's philosophy I understood why he had a great impact on my father. Back in the fourth century BC, Aristotle argued that oligarchies and democracies differed in one outstanding respect – their allocation of power and wealth. Oligarchies concentrated wealth among the ruling elite, compared to democracies which looked after the greater good.

Aristotle liked democratic systems because he believed in the wisdom of the crowds, and that happiness, whether consisting of pleasure or virtue or both, is more often found in those with cultivated minds and good character than in those who possess substantial material wealth for

little beneficial purpose and who lack good human qualities. In hindsight I think my father was trying to teach me (a young idealistic guy) via Aristotle, as how to live my life. Hopefully it has worked.

Clarrie had a book of the sayings of Marcus Aurelius, the Roman Emperor philosopher. One I recall was "Very little is needed to make a happy life. It is within yourself, in your way of thinking."

I loved those philosophical discussions about life and its meaning with my father in those early days of our Trust. Westerners owe the word philanthropy (love of humankind) to the Greeks who, since the fifth century BC, elaborated on the idea. By the 6th century AD, a philanthropy in Greek also meant a tax exemption that emperors gave to charities such as hospitals, orphanages and schools. The tax-exempt status of many modern charities has its roots in this ancient practice.

Clarrie's legal career would eventually span almost 50 years, during which he continued to help people who couldn't afford to pay. As a child I recall him smoking a favourite pipe that had been given to him by a Port Chalmers waterside worker in return for free legal assistance. During the consultation, the client had noticed a pipe on Clarrie's desk and decided to repay Clarrie with a brand new one.

Clarrie held to the view that the practice of law was a profession and not a business. When the firm's accountant presented him with his idea of how law firms could bolster their revenue by setting targets and charging for time rather than for the job itself, Clarrie was not in favour of it. However, the other partners of Stevens, Gilbert & Co approved of the idea and wanted to implement it. Clarrie took advice from a trusted friend with considerable business experience who recommended that my father exit the partnership, which Clarrie did. He was able to take his personally selected clients with him when he set up his own in practice with his legal secretary, Joan Chadwick. And soon after he was having to limit the number of new clients wanting his services.

I had not long been working on our new Trust when I saw first-hand Clarrie's compassion for the underdog. A distressed woman had turned up at his office without an appointment. Her husband had been transferred from a timber company in the North Island to one near Dunedin and the bank had declined their request for a mortgage to buy a house in the location. Clarrie suggested that she telephone the local MP who was also the Minister of Housing and explain that the reason she had been denied the mortgage was because her husband was Māori.

In due course the Housing Corporation wrote to my father to advise that it did support loan applications in certain cases and that it would assist his client. Clarrie then arranged the loan application with the local savings bank. When the woman returned with her husband to thank Clarrie for his help in securing the loan and for waiving his fee, Clarrie told the husband that he had enjoyed working with his wife and admired her courage in following through on his suggestion.

I admired Clarrie's generous attitude toward clients who were unable to afford the fees, and his belief that the legal profession should emphasise service – and courtesy – over business. With the approach of Christmas each year the pressure mounted to complete work before everyone disappeared for the summer holidays. Clarrie's secretary would do her efficient best to keep things on course, but he would always put down his pen to greet the elderly women clients who invariably arrived without appointments and bearing gifts. Acknowledging their kindness was more important to Clarrie and I learned from his attitude.



From the ground up

Working with Clarrie was engrossing. We immersed ourselves in growing the Trust's fund while needing to generate independent income for ourselves. The work also helped to ease the profound sadness we felt after my mother died. Rua was a compassionate person and full of joy. Her passing had left a big gap in my life.

The initial capital of \$1,000 injected into the Trust came from one of Clarrie's clients. My father had attended to the client's estate and had offered to waive a large part of the legal fee if the client would consider donating to our Charitable Trust. She was happy to do so.

Soon after, Clarrie was able to increase the Trust's assets with gifts in return for services from two more appreciative clients. They included personal gifts of shares in a listed company worth \$6,500 and a vacant section worth approximately \$6,000. The section was in a large Wanaka subdivision that he organised for a long-standing friend and client. He passed both the shares and Wanaka property into Rua's memorial trust. Not large amounts when compared with the assets of well-endowed trusts. But they signalled a determined start. Given the limited capital we had to invest into the Trust, it was helpful to learn about the experience of the Sutherland Self Help Trust, which was established in 1941 and began making grants 21 years later.

Sir Roy McKenzie of the JR McKenzie Trust was a well-known figure in philanthropic circles at the time. I admired his generosity. Philanthropy NZ's chief executive, Bob Moffat became another important role model in the earlier stages of my philanthropy work. Bob and I shared many good conversations.

As time would prove, it would take years of dedication to the task before our Trust began to achieve a momentum of its own. Nevertheless, Clarrie and I embarked on a stimulating period of growth.

In 1974 the Trust purchased a half share in a seven-acre bare block on the Wanaka lake front. This was followed in 1977 by the purchase of a third share in an adjoining block of similar size and with lake frontage, too. These properties had the potential to grow in value and boost our Trust's assets.

I had a lot to learn and valued Clarrie's wisdom and guidance. While continuing to run his law practice he created opportunities through the property partnerships for me to achieve a level of financial independence. It was a formative time for me, being young and relatively inexperienced.



Lake Wanaka in the '70s.

It was not all plain sailing. The Government's Reserves Act of 1973 had tightened regulations. When added to the County Council Planner and Lands and Survey regulations, we reluctantly concluded that the prospect of subdividing these Wanaka properties into two-acre lots would be both tortuous and possibly unprofitable.

In 1978 I followed up with the Lands and Survey Department head office about the sale under the Reserves Act of the Trust's lake frontage shoreline of these two Wanaka sections. Lands and Survey agreed to buy the Trust's lake frontage portion providing the co-owners gave their consent. The co-owners declined to do so. Finally, in 1980, Lands and Survey found a way around this obstacle and purchased the Trust's lake frontage share in the two blocks of land.

Faced with these on-going challenges and bearing in mind our Trust's philanthropic purpose, in 1983 I approached the partner in one of the Wanaka blocks who expressed interest in purchasing our Trust's remaining third share. I then stepped back for my father to negotiate the sale. He had an adroit mind for such business matters. He negotiated the sale of our remaining share to the existing owners and it provided the Trust with a healthy profit.

By 1978 the Trust had purchased its first commercial property – a half share in a fully tenanted building in Christchurch. Three more commercial properties were progressively purchased during the following eight years.

We sold the Christchurch property in 1985 and the profit from the sale enabled the Trust to purchase a share in an industrial property in Penrose, Auckland. Two years earlier the Trust, together with a partner, had purchased a share of an industrial property on Auckland's Great South Road. And in 1986 the Trust purchased a half share in a commercial property in the Auckland suburb of Ellerslie.

In the first few years of the Rua Stevens Charitable Trust, the


Dunedin based Perpetual Trustees Estate & Agency Company of New Zealand administered our Trust and included our grants in the annually published list of philanthropic trust grants in the Otago Daily Times. Due to our Trust's increasing assets and complexity, however, it made sense for me to absorb the administrative tasks into my management role. A role I would have for the next 45 years.

We had also established two other small philanthropic trusts in Dunedin, the Rua Stevens Paraplegic Trust with assets of \$5,000 and the Rua Stevens No 2 Trust to benefit Dunedin based non-profit organisations. The latter had assets of \$15,000. We also made grants to the Leukaemia and Blood Foundation.

By the mid 1980s the Rua Stevens Charitable Trust assets had grown to a value of \$473,000, with the interests in the properties clear of mortgages. We were finally well positioned to increase our grant distributions.



The Wanaka waterfront today, and close to the Trust's first properties.



The first beneficiaries

The Trust initially supported the arts and young people, in recognition of Rua's lifelong interests. She was an avid supporter of the New Zealand Ballet Company and loved music, and both the performing and visual arts. She never tired of visiting galleries both in New Zealand and overseas. And the needs of young people were always close to her heart. Thus, our very first grant was to the New Zealand Ballet Company in 1971.

The company received its royal charter some years later and became the Royal New Zealand Ballet. Clarrie became interested in attending performances despite having rarely accompanied Rua and her friends to the ballet while she was alive. However, I recall the memorable occasion I accompanied both my parents to see the great Margot Fonteyn. Her stellar Dunedin performance was part of her final world tour. My father would later form a supportive relationship with the then General Manager of the New Zealand Ballet, Gilbert Stringer.

The relationship continued until 1976, with my father regularly attending New Zealand Ballet performances in our hometown. I vividly remember in that year accompanying Clarrie to supper after a Royal New Zealand Ballet performance and being introduced to some of the dancers. It was inspiring to learn how dedicated they were to their art.

Two years later we began to support the Southern Ballet, which Lorraine Peters had founded in 1974 in Christchurch. We continued to make grants to this company for some years and my father and I often drove to Christchurch to attend the ballet. We stayed at the old Clarendon Hotel in the heart of the city and would stroll in the evening to the nearby Arts Centre where the performances took place. We both really enjoyed these occasions.

There was a constant need in those early years of the Trust to make it financially viable and, from time to time, it meant having to reduce our grant making. One such period arose after the purchase of a property that failed to become self-supporting. But our plans for the Trust remained strong. And they would soon extend offshore.

Sir Edmund Hillary's Himalayan Trust became one of the first organisations we supported. Clarrie deeply admired Sir Edmund's humanitarianism and in 1971 we attended his fundraising event for the Himalayan Trust he had established to support the people of Nepal. We were later delighted to meet Sir Ed and his famous Sherpa comrade, Tenzing Norgay at a fundraising event in Dunedin.

Clarrie later got in touch with Sir Edmund to tell him that he was inspired not only by his conquest of Mt Everest but also by his loyalty and commitment to his Sherpa comrades and to Nepal. During the next 36 years, until Sir Edmund died in 2008, we met with him from time to time. And our Trust continued to make grants to the Himalayan Trust during that period. The association Clarrie had instigated in 1972 via the Himalayan Trust eventually resulted in 2008 with our Trust establishing its own direct projects in Nepal, which continue to this day.



At a Nepal Day cultural celebration in Auckland: Sir Edmund and Lady Hillary (centre) with Lee and Penny and Nepali friends.



Former Royal New Zealand Ballet dancers, husband and wife Jane and Geordan Wilcox.



New horizons

Like so much of New Zealand's economy, our little Trust did not escape the impact of the share market crash of 1987. My father was concerned that our tenants should not bear the full brunt of the market decline that had impacted on their businesses. He negotiated rental relief for them as required, and significantly reduced the rent from one of the larger commercial properties in which we had an interest. The Trust's equity portfolio also suffered substantial falls in value. And one of our rental properties in which the Trust had an interest lost its tenant. The depressed market lingered in the wake of the crash and we had to take a conservative approach to our grant making.

On a personal level, the retirement in 1992 of Joan Chadwick, my father's long-standing legal secretary and our friend, ended a very important era in my life. Joan had also been a founding trustee of our memorial trust. She had worked for Clarrie for nearly 35 years and as a trustee for 22 of them. We both felt blessed to have such an exceptional and loyal stalwart, especially during the enormously challenging period following my mother's passing and the disintegration of our family. Joan had been a part of my life since I was a child. Often after school I popped into the office. And after my mother died and I subsequently worked for my father, Joan was always supportive. She was one of the most loyal,

Opposite: Wedding bells –
12 February 1994.



Joan Chadwick, legal secretary to Clarrie Stevens.

dependable people I was honoured to know.

Before my father and I began putting together our new lives, Joan made meals for us both and gave me menus to start to cook at home. My home cooking wasn't too hot and my father quickly decided that our future lay in need of a daily cook.

Joan played a significant role in the Trust's growth. By the time of her retirement in 1992 the Trust had acquired an asset base approximating \$685,000.

It was still a relatively small fund base from which to make grants. But this was about to change. As we entered the 1990s my father was pressing me to bring on board someone to succeed him. I was acutely aware of the necessity to have a person with strong investment experience. At the same time, I was keen to move our investment focus to Australia, which was enjoying buoyant times with an expanding mining industry driving the country's trade with China. With no hesitation, I suggested Alex Burt. Alex had been my fathers' Australian based share broker and I had visited his office in Sydney with my father in the early 1970s. Their acquaintance had stemmed from a lifelong friendship between Alex's mother and Rua, who had been to school together.

Clarrie was approaching 80 and retirement and we were both delighted when Alex agreed to take over the management of the Trust's investment portfolio. Alex's involvement marked the beginning of a golden period for the Trust. He transformed the investment portfolio, and the sustained capital and income growth enabled us to increase our grant making with confidence. Alex became a trustee in 1994 and his outstanding contribution would continue at no cost to the Trust for 21 years.

The capital profits Alex generated for the Trust not only enabled more substantial grants but also made it possible to host celebratory events every five years. These would be held on the nearest Saturday to

Rua's birthday. Alex and Carolyn, his wife, would fly from Australia to join us on these occasions and they always insisted on paying for these trips themselves.

A year before the Trust's 20th anniversary in 1990, my father and I gave some thought as to how we could mark the occasion. Central in our minds was my mother's love of ballet. We initially thought of making a grant of \$20,000. After discussion with the Chief Executive Officer of the Royal New Zealand Ballet (RNZB), Mark Keyworth, we decided to donate \$40,000 and become one of a group of sponsors of the RNZB tour of Europe in 1989. We later made another grant for the RNZB to enable the purchase of a van for the company.

By this stage Clarrie had retired and was living with me in Auckland. It was a big change, especially for my father who had lived in Dunedin for nearly 80 years. However, he enjoyed rekindling the friendship with his former legal secretary, Joan Chadwick and her husband after they had retired and moved to Waiheke Island. The Chadwicks came to stay with us from time to time and it was always good to see them.

Clarrie eventually moved from our Auckland house into a residential care home in Remuera and we shared many in-depth conversations in those final years of his life. I will always feel pleased that he and Penny got to know one another in the two years before he died. I had met the wonderful person who became my wife in 1993 when I'd been looking for volunteers to help out at a Youth Town event. An attractive young lady called Penny Jones put her hand up. A year later we were married.

Not long before my father died, he told me that he was looking forward to being reunited with Rua. He then said, "Always remember Lee, that when your time is up your mother and I will have a seat at the table for you to join us." His comment reflected the quiet, spiritual connection we shared and I still feel emotional when I think about it. Father Chris Skinner SM, a Trust recipient and friend of Penny's and

mine, visited Clarrie with us on the day he died. Chris witnessed my father's conversation with me and was so moved that he wrote a song called 'A place at the table' and sang it at Clarrie's funeral. The song was subsequently recorded and has been since sung at many funerals, including that of my late mother-in-law, Olwyn Jones. Chris also officiated at our wedding.

Clarrie died in 1995 on 12 July, 25 years to the day after Rua died. He had devoted those intervening years to creating a fitting memorial trust in her name. His obituary in the Otago Daily Times referred to Clarrie in its headline as 'One of the sharpest legal brains in Dunedin.' And how during his legal career that spanned more than 50 years, "he earned a reputation as an expert in taxation, estate planning and trust work and as a shrewd and able businessman". He was known for having a great mind, a sharp wit and a real independence about him. And when he married Rua Frapwell in 1938 he entered into a partnership that enhanced his life for 32 years.

The obituary also referred to Clarrie's love of the law and how he "freely donated his services to numerous individuals who could not otherwise afford to hire a lawyer."

I greatly respected my father's fortitude as he attended to all his responsibilities while also striving to build a trust endowment fund to support our philanthropic endeavours. We had set out on a long journey together and encountered plenty of difficulties along the way. Despite them, he never faltered.

Almost the only difference of opinion we had during all the years we worked together was when we started to buy commercial property. Being young and idealistic at the time, I pushed for the Trust to fully own each of the property acquisitions. However, Clarrie was determined that I also should own a significant share, having given up my previous job to support him in building up a trust that would be able to provide funds

in perpetuity. It was one of the few periods working together when he totally over-rode my viewpoint. Looking back, I feel eternally grateful for his clarity of purpose in ensuring my future financial security and well-being.

Clarrie had a good grasp of Latin, which he had studied as part of his law degree. He loved the language and decided that the Trust would have a Latin motto, *In meliorem partem nos nunquam mori* (The better part in us will never die).

On 8 September 1995, the name of the Trust was changed to include Clarrie's name in recognition of his devotion to Rua's memory during the last 25 years of his life. The amendment to the Trust deed read: 'In recognition of, and in tribute to the outstanding contribution made to the Rua Stevens Charitable Trust by the late Clarence Henry Somerville Stevens, who initiated the creation of the Trust and was primarily responsible for the investment decisions which have resulted in the Trust being in the financial position it enjoys today. The Rua Stevens Charitable Trust shall be henceforth known as Rua and Clarrie Stevens Charitable Trust.

"It is in the quiet crucible of your personal, private sufferings that your noblest dreams are born and God's greatest gifts are given." I chose these moving words of the American gospel singer, Wintley Phipps for my father's epitaph because they reflected the story of his life after Rua died. And to some extent my own.

During the 25 years that my father was involved with the Trust he oversaw its growth in investments to \$704,000 and distributed over \$250,000 in grants to the arts and other non-profit organisations. This would not have been possible without Clarrie leading the way.

The last of the Trust's Auckland based commercial properties was sold in 1998 and the proceeds were re-invested in the Australian equity market. By 2000, our small memorial trust's asset base had reached \$1

million, a milestone of which I can't help feeling proud.

I had learned from Clarrie that philanthropy was more than just giving money away and I was determined to continue our practice of a more personable style of philanthropy. From the outset Penny embraced the Trust and shared my attitude to philanthropy. I felt fortunate to have her support and was reinvigorated by her enthusiasm and fresh ideas.

I had previously been grappling with far too many applications for grants, partly due to feeling uncertain as to the most efficient way of inviting them. I had spent hours trying to decide which ones deserved a grant. Thankfully, I learned a more strategic approach from Philanthropy New Zealand. I discovered how to limit the number of potential applicants by making grants, in our case, available to small organisations and sometimes personally inviting them to apply rather than throwing the process open to all and sundry. I also took advice to adopt a multi-year funding model to provide larger grants over several years to a smaller number of organisations. Multi-year funding is more measurable and enables stronger relationships to develop between the donors and recipients.

It is not uncommon for philanthropic trusts to support organisations for several years and then move their grants to new recipients. However, it can often be a struggle for the previous recipients to find new donors. For this reason, I liked the idea of creating a trust family of grantees and announced my intentions at the Trust's silver jubilee celebratory dinner held in a marquee in the grounds of Puketutu Island on 4 November 1995. It was the closest available date to Rua's birthday. As part of the entertainment, Helen Medlyn, representing Opera NZ, sang as did students from Glendowie College. And to mark the anniversary we donated \$25,000 to the Parenting and Confidence Charitable Trust that was established by Ian and Mary Grant in 1993.

So began a lively new era of grant making, accompanied by functions

and dinners that we hosted every summer in our garden to bring the grant recipients and our friends together. The entertainment was often provided by one of our grantees.



Grantees and friends gather with Lee and Penny to celebrate the 45th Anniversary of the Trust (above) and 40th anniversary (below).



A growing family of grantees

New Zealander Anne Firth Murray, who founded the Global Fund for Women and is a consulting professor of biology at Stanford University, became an inspirational friend to Penny and me. We admire her non-profit organisation that raises and gives away money to groups around the world supporting women's rights. And we share Anne's attitude to grant making, which she describes as being not just about the amount of money raised. For her, the way we do our work is as important as what we have done.

Penny wholeheartedly supported Clarrie's and my grant making ethos of taking an active interest in the work being done by our grant recipients, rather than just distributing one-off grants. And together we set out on a path that would envelope us in a widening and stimulating network of people as we continued to build relationships with the grantees in the arts, in education and other community endeavours.

During all the previous years of the Trust's existence, Clarrie and I had concentrated our grant making on the areas of interest that had mattered to Rua. After he died, I came across a memo he had written back in 1982 about the intention of the memorial fund. He wrote that it was to be concerned with the main charities such as St. John's Ambulance, Salvation Army, Southern Ballet, Royal New Zealand Ballet, churches,

the Himalayan Trust and to generally to assist in relieving poverty. But he added that this list should not be exhaustive because a rigid adherence to it might be disadvantageous to the Trust in some circumstances. And like many other philanthropic trusts, we had been inundated with requests for grants to individuals, which Clarrie had made clear were outside the polices of the trustees.

Penny agreed to be an advisory trustee and soon found her feet, bringing a new wave of fun and creativity to the Trust's grant making ethos. She encouraged me to broaden its scope. By widening our grant making, she believed we would further our understanding of our multi-cultural communities and increase our experience of philanthropy in action. And as the grant-making evolved into the wider community, Penny asked me what Clarrie and Rua would think about her ideas. Knowing my parents, I instinctively knew their answer. "Back our Penny."

We kicked off in 1994 with a new partnership with a local high school, Glendowie College. The idea of supporting the school occurred after I attended a church social and was impressed with the music. I discovered the group of talented young singers and their music teacher were from Glendowie College and decided to find out how I could help in some way.

I met with the school principal, David Eddy and we struck an immediate rapport. Our discussion led to my offering funding from the Trust for the school's music and drama departments. The grants would help pay for the musical instruments for the school orchestra and to buy equipment for drama classes.

In the ensuing years we disbursed some \$62,000 to the college, some of which was used to purchase a baby grand piano. The private school I had attended had a grand piano. Why not a public school like Glendowie College? When we celebrated our Trust's 35th Anniversary in 2005 with



Steven Dakers, in whose name the Trust established a memorial scholarship for fellow Glendowie College students after the death of the talented young musician.

friends and grantees at a garden party at Auckland's historic Highwic homestead, Glendowie College music students provided entertainment with their rousing 39-piece band.



Former Glendowie College Principal David Eddy (left) and Father Chris Skinner (centre back) with students and Penny and Lee at the baby grand piano gifted by the Trust.

THE ARTS

Our growing association with the Arts was invigorating. Following our Silver Jubilee in 1995, we began attending Opera New Zealand productions. It was a fascinating new world for both Penny and me and enlivened by Opera New Zealand's Business Manager, Robert Lahman. Robert went on to manage partnership programmes for the Royal New Zealand Ballet and became a good friend.

Our widening interest in music genres prompted grants from the Trust to The Young Musicians National Competition and the Tower New Zealand Youth Choir.

Penny and I attended many Royal New Zealand Ballet performances and were captivated by the beauty, physicality and energy of the dancers and by the music. By 2000, we had begun sponsoring soloist ballerina, Jane Turner, and continued to do so until Jane retired from dancing seven years later. The Italian soloist dancer, Alessia Lugoboni became the next RNZB soloist to be sponsored by the Trust for six years.

These sponsorships evolved into warm friendships with Jane, Alessia and their partners. Penny and I learned much about ballet over lunches and dinners with our talented young RNZB friends. And encouraged by Alessia, we visited her and her family in their beautiful city of Verona, Italy, in 2017.

The Trust's support of the RNZB came to an end after 32 years but the arts continued to be a key member of our Trust family of grantees. Tempo Dance Festival is a vibrant annual event in Auckland that we have supported. The festival showcases dance artistry of many kinds and the cultural dynamism of our country and our Asia-Pacific neighbours.

And we are proud to continue our funding partnership with the Auckland Philharmonia Orchestra (APO). It began in 2000 with the Trust becoming a chair donor with our first sponsorship being Jenny Raven, Sub Principal Percussion. The Trust is now the chair donor for First Violinist Mark Bennett and our sponsorship of Mark continues to this day. It has been a most enjoyable and rewarding association. Mark has been brilliant in the way he has supported our Trust by performing at some of the anniversary celebrations. It's great to be in his company. His enthusiasm for his music is infectious.

Mark won a post graduate scholarship to study at the Royal Academy of Music in London and went on to play with famous London orchestras including the Royal Philharmonic and the BBC Symphony. On returning to New Zealand he won a first violin position with the APO, served as Chairperson of the Auckland Philharmonia Orchestra

Society and also taught violin.

Mark was awarded the 2015 Auckland Philharmonia Foundation Scholarship and returned to the Royal Academy of Music in London to further his professional development. He has been playing in the First Violins for the APO since 1997.

The APO has been the principal arts recipient of the Rua and Clarrie Charitable Trust and what a delight this fine organisation has been for Penny and me, as well as a wonderful connection to my mother's memory. We admire the talent of both the musicians and the first-class team under the management of the Chief Executive, Barbara Glaser. The APO presents about 70 of its own concerts each year ranging from classical to pop to baby proms, in addition to major engagements with visiting solo artists, outdoor and public concerts, and special events.

Another arts organization which was introduced to us by the then



Through dance, drama and music, young migrants and refugees from Mixit workshops express their creative talent at their summer 2020 performance in Auckland Botanic Gardens. The project evoked Alice in Wonderland and also their concerns about climate change and the environment.

CEO of Auckland Community Foundation, Hilary Sumpter, is Mixit, a vibrant organisation that uses creativity through dance and theatre to empower young people from refugee and migrant backgrounds. Mixit hosts weekly workshops run by talented artists to nurture participants for future opportunities and build their self-confidence. Working in the performing arts encourages them to share the richness of their respective cultures. The Mixit Charitable Trust was established in 2006 and its work with young people continues to thrive.

EDUCATION

In the field of education, one of my priorities was to establish a memorial grant in my father's name. This was achieved in September 1997 with the inaugural Clarrie Stevens Memorial Scholarship. The scholarship is awarded to students in the final year of study for the Bachelor of Laws or Bachelor of Laws with Honours. Preference is given to candidates who have demonstrated special ability in the areas of Wills and Trusts or Commercial Law as these were Clarrie's areas of special interest and expertise. Financial need as well as academic ability are considered in awarding the Scholarship.

The Scholarship is awarded by a Dunedin based committee of lawyers Sarah Simmers, David Smillie and University of Otago Professor Nicola Peart. I am grateful for their valued contribution. And that of retired lawyer Geoff Thomas, who is a long-standing family friend.

One of our fond memories of this memorial scholarship was the celebration of its 10th Anniversary, in 2008. I suggested a celebratory dinner to Mark Henaghan, then Dean of the Otago University Law Faculty. (Penny and I have always been passionate about celebrating the sheer joy of the Trust's anniversaries.) I also asked Mark whether it would be possible for a string quartet to perform for the invited guests. He came up trumps and organised a dinner and string quartet at the

Otago University Staff Club. It was a magical evening.

Another scholarship project that we are keen to support is the Kupe leadership programme at the University of Auckland. From across the faculties, 16 exceptional students are chosen to receive a year of personal mentoring to enrich their postgraduate studies. The aim is to develop future leaders to make long-term culturally responsive and impactful change in Aotearoa and beyond. We are pleased that we have been able to allocate funds this current financial year.

THE COMMUNITY

Te Whakaora Tangata is one of most recent community-oriented organisations the Trust has begun supporting. Te Whakaora Tangata helps families struggling with poverty and the problems that too often stem from it such as violence, sexual abuse, drugs and crime.

The Rua and Clarrie Stevens Charitable Trust has also made grants to Women's Refuge and to the Tamaki Pathways Trust, of which I became a founding trustee in 2000. Tamaki Pathways worked with vulnerable young people in Glen Innes who were principally of Maori and Pacific Island ethnicity.

I retired as the chairman and a trustee in December 2007 and treasure the opportunity I had to serve this community. I felt blessed and privileged to work alongside two remarkable Maori women, Pene Loza who was Executive Director from 2002 to 2008 and Atawhai Morgan, Administrative and Funding Manager from 2004 to 2008 and Executive Director from 2008 to 2012. They introduced me to the wonderful world of Maori with all the nurturing values inherent in their culture. Their journey with me was a journey of love in both their work with youth and all others with whom they interacted.

Sadly Pene passed away in January 2019. But there are enduring and memorable associations from the time in 2007 when she asked



The historic Hato Hemi church in the Far North village of Mitimiti.

my advice on obtaining funding for a new roof for the Wharekarakia Church, Hato Hemi at Mitimiti Marae in the Northland. The original Wharekarakia was built in 1886. Penny and I decided to take on this project via our Trust. When it was unveiled in 2008, we were unable to attend and were represented by two friends. We were later invited to a kutai (mussel) festival on the Marae at Mitimiti. We loved the tour of this beautiful little church and the hospitality of the people.

The warmth of that occasion felt far removed from the dramatic plunge of the world's financial markets that year. The turmoil of the GFC, as the great financial crash came to be called, set off the worst recession in 75 years and brought global financial systems near to collapse. Few escaped the effects. It took quite some time for the Trust's income and asset base to recover, and to be able to restore grants and to introduce some new ones.

In the area of community support Penny's work experience has been a driving force for the Trust. She is especially interested in organisations that work with migrants and refugees and her initiative to reach out to Auckland's ethnic community had my full support.

The Trust's initial funding for a community project was for one of Penny's initiatives – the Cooking and Friendship Programme for women. She developed the project with the support of the Auckland Business and Professional Women's Club (ABPW), of which she was a member. Women from 28 different countries participated in the programme and its success led to Penny and the ABPW Club President, Sujatha Anthony, receiving a Making a Difference in the Community Award on behalf of ABPW, from the International BPW Executive at the 2008 congress in Mexico City. The Cooking and Friendship Programme for women was subsequently registered by the United Nations as an effective way of helping migrant and refugee women ease into their new communities.

A further initiative of Penny's that was funded by the Trust enabled



Penny and Auckland Business and Professional Women's Club President, Sujatha Anthony, at the International BPW 2008 congress in Mexico City.

a hundred Somali women to obtain their driving licences.

New Horizons for Women is another organisation the Trust previously supported, and by way of an award named after my mother. The organisation supports education, innovation and research projects that benefit women.



Dr Christina Berton (right) and Penny at a Liberty of Being Me Foundation event in Auckland.

Then, in 2010 the Trust became the principal funder of The Liberty of Being Me Foundation, which runs workshops for mothers and their daughters to help them develop self-esteem. Penny established the Foundation after attending the International Business and Professional Women's Congress in Mexico in 2008 with its 'Power to make a difference' theme. At a workshop about resisting violence she was inspired by the contribution of self-esteem expert, Dr Christina Berton. For Penny personally, it was the first time she felt and accepted her inner strength and beauty. Christina Berton's words not only changed the way Penny looked at herself but also deepened her understanding of how a mother's behaviour can determine how well their daughters do in life.

Penny had my full support when she decided to bring Dr Berton to New Zealand the following year. With funding from the Trust, she arranged for Christina to conduct workshops in Auckland, Wellington and Dunedin. Approximately 200 women took part and the response was very encouraging.

Christina Berton's work has reached many women and girls in Mexico. Her approach to dealing with family violence is to help mothers and daughters build self-respect and to understand how their perception of themselves influences their behaviour towards others. The benefits of strengthening the bond between mothers and daughters also extend to their families.

Christina gifted to Penny her Mother/Daughter workshop programme in 2010 and returned to New Zealand that year to be the guest speaker at the launch of Penny's new Liberty of Being Me foundation (LOBM) and to train workshop facilitators for the workshops. The workshops have so far operated in the Auckland region and are based on the successful model Christina developed in Mexico under her non-profit Amara Foundation.

In March 2020, Christina returned again to Auckland to celebrate the Foundations 10th Anniversary as guest speaker and to assist the development of the Foundation's structure.

The Liberty of Being Me Foundation's growth is encouraging and the Trust will continue as its major funder. In my role as honorary treasurer it is special to work alongside Penny as LOBM extends its work. She regards it a privilege to be able to share The Liberty of Being Me message. To date we have reached more than 1000 women and girls and we plan to double this number within 12 months under the leadership of the new director, Julie Orchard. The plan is also to broaden our events to cater for women of all ages and to enable mothers with sons or women without children to participate. The work will continue

to focus on what is right rather than what is wrong with us.

It can be challenging to establish a non-profit organisation unless it secures financial backing. I experienced this during the ten years trying to source funding for LOBM. It was a struggle. However, I will be forever grateful to New Zealand Lotteries, the first external funder organization who accepted our application for funding support of LOBM. Penny's foundation underpins an immensely satisfying new direction for the Trust.



With Lady Hillary in Nepal, 2011.

REACHING OUT TO NEPAL

Sir Edmund Hillary was the inspiration for one of our Trust's longest standing grants and following his death in 2008, Penny and I visited Lady Hillary to discuss our future support of the Himalayan Trust. It was decided to focus on specific projects. We agreed to sponsor one of the 27 schools supported by the Himalayan Trust.

The first of what would become ongoing grants from our Trust was

made in 2009 to Phaplu School, based in Phaplu village in Solukhumbu district about 160 kilometres from Kathmandu. Phaplu sits amidst a beautiful green landscape in the foothills of the Himalayan mountains. Solukhumbu has a rich culture and friendly people. However, there is an increasing need for higher standards of health and education for the growing population. The Himalayan Trust has done significant work in these critical areas, especially in educating young people.

Our funding of specific projects based at the Himalayan Dudhkundha Lower Secondary School at Phaplu commenced in 2008 and funding has been directed towards the refurbishment of classrooms, construction of additional toilets and the purchase of computers and electric power connections. Funding has also provided, via scholarships, for school uniforms and bags. We are currently sponsoring student memorial scholarships in memory of the late Sunil Karki. Sunil was the school's highly respected head teacher and he became a loved friend of Penny's and mine. In challenging conditions, Sunil consistently went beyond the call of duty to provide educational opportunities for the young students.



Solar panels to warm classrooms in Jivanjyoty Secondary school, Kangel.

He enriched many young lives and we were fortunate to have known him.

We formed another special friendship in Nepal in 2011 when Lady Hillary invited us to attend the 50th anniversary of the Himalayan Trust in Kathmandu. On our visit to the school in Phaplu we were warmly welcomed by Nava Bahadur Bhujel and quickly became friends. Nava is employed by the Himalayan Trust to co-ordinate projects for the many schools they have been supporting.

When Nava asked if we would consider expanding our support to projects in his village of Kangel we were happy to do so. Since 2012, the Trust has made grants to Nava's Creative Youth Society for a number of projects involving five schools.

Rita Thapa, the founder of Tewa, is another impressive person introduced to us by our friend Anne Firth Murray. Rita was a past board member and chair of the Global Fund for Women. Tewa (the Nepalese word for 'support') is a philanthropic organisation that works with women from grass roots to tertiary education in Nepal. She has more than 35 years' experience as a feminist educator and community activist initiating and supporting institutions for women's empowerment and for peace. Rita also founded and led Nagarik Aawaz, an initiative for conflict transformation and peacebuilding in her turbulent nation of Nepal.

We were pleased to help Tewa with funds to purchase furniture for their new residential building in Kathmandu.

To extend the Trust's support in other areas of need, we contributed to a relief fund set up after a major earthquake in 2015 caused nearly 9,000 deaths, injured nearly 22,000 people and left many people homeless. The Trust's support of projects in Nepal stretches back 48 years. The sponsoring of students via Sunil Karki's Memorial Scholarships based at Phaplu School and funding to projects via the Creative Youth Society

will continue into the future, subject to availability of funding.

SETTING SAIL

In 1983 the Trust received an invitation to contribute to fundraising for the construction of the new sail training vessel, the 'Spirit of New Zealand.' The Trust supported the fundraiser with donations spread over three years. We continued to provide grants during the next two decades and the 'Spirit of Adventure' was a beneficiary of the Trust's 30th Anniversary dinner.

The Spirit of Adventure Trust invests in helping young people to develop their life skills. New Zealanders are known for their ingenuity and a sense of adventure. The training voyages encourage the young participants to unlock their potential by "hoisting the mainsail" and trying new things. The aim is to help them cope with future challenges and the pressure of accelerating change.



Michael Hermans received sponsorship from the Trust to sail on the Spirit of Adventure.



Looking ahead

Penny and I feel privileged to know that we have made a difference with our on-going grants. And we have relished the anniversary celebrations with family, friends and grantees over the years. The Trust's 40th Anniversary was celebrated at the Parnell Gardens, a favourite lunch venue of Clarrie's. The keynote speaker was John Prendergast, then chair of Philanthropy NZ.

Following our Trusts 40th Anniversary, I began to consider its future management and who best to take it forward. Yet I felt conflicted because of my emotional attachment to my parent's memorial trust and the many years of giving my best to be a diligent steward.

I investigated succession planning possibilities with my lawyer and a trust office. But it was not until meeting Jenny Gill, then Chief Executive Officer of the ASB Trust (now Foundation North) that a likely future manager of the Trust emerged. After some discussions with Jenny she later introduced both Penny and me at a Philanthropy Conference to Mark Bentley who was the chief executive of the organisation now known as Auckland Foundation.

Its not-for-profit status was one of the reasons why this organisation appealed to me. And after a great deal of reflection, I was satisfied that it was in the interests of the Trust to handover the responsibility for

the Trust and its management to the Auckland Foundation. It was then under the leadership of Hilary Sumpter who we got on with from our first meeting.

Hilary organized a private dinner at the Royal New Zealand Yacht Club (RNZYC) on 12 July 2015. Alex and Carolyn Burt joined us from Sydney. The Trust's accountant, Bryan Bain and his wife, Janice, were invitees, as were representatives of Auckland Community Foundation. The Supplementary Deed to Auckland Foundation's Trust Deed was executed at my request on 12 July 2015, marking exactly 45 years since Rua's passing and 20 years since Clarrie's passing. The RNZYC venue held special interest for Alex whose grandfather had been a commodore there in its early years.

Penny and I became advisory trustees of my folk's memorial Trust as a sub fund of Auckland Foundation. This was followed up on 18 July 2015, with our 45th anniversary celebration at the Richmond Yacht Club. It was High Tea with a difference. We celebrated diversity. The high tea was catered for by WISE (Women-Inspired-Strong-Empowered and Enterprising). The event was attended by 81 guests and, as with all our other anniversaries, specific grants were distributed.

Penny and I remain involved with the grant making. The decision to become a 'sub-fund', has proved to be the right one. We are grateful to the Foundation and its support of the values and family-oriented character of our Trust. We know that when we finally are not able to continue to be involved in the work of our Trust, it will progress in the Auckland Foundation's capable hands.

The other big change for the Trust at this time occurred when our much valued trustee and manager of the Trust's investment portfolio, Alex Burt, retired from these positions. His services to the Trust over many years were outstanding, both with building up the Trust's investments and the personal support to Penny and me. Alex and his

wife Carolyn came to all our anniversary celebrations, each time flying in from Sydney at their own cost and arranging their own accommodation. Their support was magnificent and an enduring memory of the depths of their connection to our Trust, to Penny and me, and to my parents.

Fortunately, I was able to obtain the very able assistance of Rob Josephson, Senior Financial Advisor and Director within the Wealth Management team of JB Were. Rob has taken over the management of the Trust's portfolio and, like Alex, has become a valued friend.

It was an eventful time. Penny and I were made honorary members of Philanthropy NZ in 2015 and were most appreciative of this gesture.

The following year I felt humbled to receive the New Zealand Order of Merit for services to Community. And I felt gratified that the accolade was due to the people who believed our Trust's philanthropic work has been worthwhile to our communities.

The honour would not have been possible without my wife, Penny. She has been a constant support and my gratitude to her is immense. I was so pleased when Penny was appointed a trustee, totally on her merits. From the start of her involvement in 1994 she has played a leading role in making the Trust a more diverse grant maker and closer to our grantees. She brought compassion, creativity and energy to the Trust and into my life.

Far from being a chore, the work to broaden the scope of the Trust has been extremely rewarding because of the empathetic people we have met along the way, several of whom have become good friends. We learned much from the organisations we have come into contact with over the years. I know I can speak for Penny, too, when I say the experience has brought us a lot of joy.

The Trust got me up in the morning. It has been my life's work. As the Trust evolved from the difficult and lonely early years after Rua's



At the Honours investiture in 2016. From left: Janice Bain, Geoff Thomas, Sally Schoon, Rt Hon Sir Jerry Mateparae (then Governor General), Lee, Penny, Darren Priday and Marlene Duncan.

death, so did my growing passion for philanthropy and my capacity for viewing life in positive ways. Looking back, the work to build the Trust had a healing effect.

Through hands-on experience I learned the true meaning of giving. And that few things in life are more worthwhile than having a purpose that is greater than being about oneself.

Through Penny, I have gained greater insight into how New Zealand's diverse communities manage in their new country and I feel pleased and proud that the Trust has grown to encompass them. Penny's natural affinity with helping others has led to her contributing in so many ways and she remains an irreplaceable advisory trustee.

It is good to know that our personal and non-judgemental attitude to grant making has worked well for our grantees. The famous 20th century actor, Orson Wells, said that he had never claimed to do things

better than anyone else, but he had set out to do things differently from everyone else. I love his words because they express what I feel about our Trust – a minnow in the grant making world but trying in its own way to make a small but positive difference in people’s lives.

Our modest sized Trust that started out on a shoestring has to date been able to distribute almost than \$1.754 million worth of grants. In its 50th year the Trust continues to support the arts, education, family and youth development, refugees and migrants to build new lives in New Zealand, and education-based charitable activities in Nepal.

The Rua and Clarrie Charitable Stevens Trust is an evolving story. And I am forever grateful for my father’s vision and clarity of purpose.

“Death leaves a heartache
No one can heal;
Love leaves a memory no one can steal.”
Anon



Clarrie aged 87.



Our grantees and associates

Mark Bennett

Violinist, Auckland Philharmonia (APO)

As a violinist in the Auckland Philharmonia for over 23 years I have been fortunate to become acquainted with many of the patrons, sponsors and friends of the Orchestra. I find it fascinating to learn more about this valuable APO support network and the individuals that make it up, as they all have a great deal of insight and understanding of the value of arts in our society.

A highlight of my time at the APO has been my association with the Rua and Clarrie Stevens Charitable Trust, especially the opportunity to develop a relationship with its trustees, Lee and Penny Stevens.

At the APO we encourage passionate individuals, like Lee and Penny, to get involved through our Chair Donor programme, connecting the donor with a player. It enables the donor to get an insight into the life of a working musician and to also to have a particular person of interest in the orchestra when they come and hear us perform. It gives the player a great sense that there is support for him or her from the philanthropic community. I have always felt it is essential for us as musicians to foster



Mark Bennett

a connection with the audience we serve. Without such an audience and generous supporters, we would not have a professional arts scene. It is the professional arts sector that makes us think about who we are as people and how we express ourselves as a society. I am proud to be involved in this.

As my chair donors of now 16 years, Lee and Penny, have always been warm and generous to me. I have enormously enjoyed the connection I have had with them. They have taken a strong interest in my life, the life of my family and made me feel like part of their family, enjoying some wonderful meals together whether at their house, or at a venue close to them, or to me. Over time I have enjoyed learning about their lives, their challenges, their successes, and Penny's passion for her trust, The Liberty of Being Me.

What impresses me most about Lee and Penny is that at no point do they show any sign of looking for recognition, or to be put on a pedestal. They continue the vision set out by Lee's parents, Rua and Clarrie, with an admirable modesty and integrity of purpose. We can all learn from this quality.

Barbara Glaser

Chief Executive, Auckland Philharmonia Orchestra

For as long as I've been involved with the APO the Rua and Clarrie Stevens charitable Trust has been part of the APO family. It has been wonderful to see how much joy Lee and Penny have had from their association with the orchestra and with their musician, Mark Bennett. And I know from talking to them how much it has meant to them to be directly involved in enabling Mark in turn, to bring so much joy to Auckland music lovers and to young musicians through APO's education

programme. Importantly, their long term and consistent support has enabled us to plan with certainty. This in itself is a great gift in these uncertain times.

Susan Wall

Director of Development, Auckland Philharmonia Orchestra

On behalf of the Auckland Philharmonia Orchestra, I wholeheartedly thank Lee and Penny Stevens for their ongoing support of the Chair Donor programme over the last 18 years.

Over this time, they have become cherished members of the APO family, and an integral part of our future. As Chair Donors, Lee and Penny enjoy a unique and close relationship with both the orchestra and their musician, violinist Mark Bennett.

Nava Bhujel

District coordinator and facilitator for schools supported by the Himalaya Trust

I first met Lee and Penny in 2011 when they visited Dudhkunda Himalaya lower secondary school in Phaplu. It is one of the now 60



Sunil Karki (left) and Naval Bhujel (right) with Lee and Penny.

schools supported by Sir Edmund Hillary's Himalayan Trust in the Solukhumbu district of Nepal. The Head teacher, Sunil Karki, had organized a programme in Phaplu School to welcome Lee and Penny and to show them the results of their support. We became instant friends and I have since learned many things from them during our long-lasting friendship.

I would like to highly acknowledge Lee and Penny for their invaluable funding support to Dudhkunda Himalaya school in Phaplu and their support of the Creative Youth Society in Kangel. Their generosity has achieved things that would otherwise not have been possible. For example, with sponsorships to provide school uniforms for the students. They have helped the salary for our IT volunteer teacher, with water filters for clean drinking water, landline telephone connections, electrical wiring for computers, new classroom furniture and two new toilet rooms.

The help has been very effective. The refurbished classrooms are now warm, clean and safe study places for the students and teachers. When the students receive school uniforms their attendance becomes more regular and their progress increases. And having filtered drinking water in each class is not only healthy for the students but also saves time for study because they don't have to go outside for water.

Many parents in rural villages in Nepal cannot afford school uniforms for their children so the help from Lee and Penny is welcome. I understand the struggle for parents, having been born the first of 11 children into a poor family. My parents were illiterate and did not have enough money to buy new clothes but believed more children meant more strength.

Education is the weapon to achieve progress for our country. Along with health, equal and quality education for our children is the most important thing. I started school without shoes or warm clothes, but I

worked at various jobs to pay for my secondary and university education to achieve a master's in education from Tribhuvan University Campus. Kirtipur. Now I am working towards improvement in education, the environment, and livelihood in the rural communities of Nepal.

Phaplu school, the Creative Youth Society team and I will always be grateful to Lee and Penny for their help in sponsoring the children of poorer families with school uniforms, for providing teaching equipment, teacher salary subsidies and other education and community support projects. I wish them happiness, peace, prosperity, good health and a long and beautiful life.

Alessia Lugoboni

Former Royal New Zealand Ballet soloist; now dance teacher in her home country of Italy

From the time we met Lee, Penny and I had a wonderful connection that went beyond the ordinary sponsor-dancer relationship. As a young dancer away from home, they were very supportive and I felt that I could talk to them at any time, about good days, bad days and more. Our bond has continued over the years. Lee and Penny have become family and will be in my heart forever. When they visited my hometown of Verona during their European trip in 2017 my parents, Lorella and Alberico, also formed a beautiful bond with Lee and Penny. There might be oceans and mountains that separate us but we are closer than ever.

Jane Wilcox

Former Royal New Zealand Ballet soloist; now dance teacher and inbound tourism operations manager and travel consultant

Lee and Penny were fabulous supporters and sponsors of the Royal

Former Royal New Zealand
Ballet soloists, Alessia
Lugoboni and Jane Wilcox.



New Zealand Ballet. They had a real interest not only in the company but in the connections that they made.

As my personal sponsors, I always looked forward to meeting up with Lee and Penny following the Auckland shows, for a drink and dessert or attending a company function. They have a real passion and are very down to earth people. I admired the way they continued to keep the legacy going of Lee's parents, Rua and Clarrie, and their love of the arts. Not only did I have these two as my wonderful sponsors and support throughout my time as a dancer, but they have also become lifelong friends of mine and my husband, Geordan Wilcox. He also loved our connection with Lee and Penny. When they were sponsoring me they often remarked how lucky they were to have a two for one bonus.

They assisted financially with Geordan taking part in the Jacobs Pillow Dance Festival in the Berkshire Hills out of New York. It was such a highlight for him in his dance career. Geordan is now Head of Dance

at St Kentigern's College where I teach young students of dance on Saturdays.

My freelance dance teaching fits in with my main job as in Inbound Tour Operator in New Zealand. It is always lovely to be back in the studio inspiring young up and coming dancers.

Wendy Preston

Co-founder and Creative Producer/Director, Mixit

Mixit is a programme that helps young migrants, refugees and locals to build their confidence and friendships through dance, drama and music. The Auckland Foundation linked us with Lee and Penny and it has proved a win-win association. There was an immediate synergy because of their support of the arts and community projects, and their genuine wish to help people in need.

Having been involved in arts for my whole career I understand the power of arts in the community. Lee and Penny were inspired by the creative work at Mixit where our talented artists run weekend workshops. They come into the studio for the performances, and their personal as well as financial involvement in our work and people is greatly valued. It is particularly important for the young people, especially the refugee children who have had to flee their country with their parents and often don't have older family members in their lives. Some come from cultures where young people are not encouraged to speak up and express their opinions.

The arts provide a transformative change. The power of storytelling, film, dance and drama helps develop their confidence to speak up in a noisy environment, to socialise and feel they belong.

We regard Lee and Penny as part of our extended family.

With Carolyn and Alex Burt.



Alex Burt

Former investment advisor for more than 50 years, former Trustee of the Rua and Clarrie Stevens Charitable Trust and Member of Australia's first online broking company

Although it does not have a huge pool of funds, the Rua and Clarrie Stevens Trust has benefited a lot of deserving recipients. Lee has been immensely dedicated to the Trust and my wife Carolyn and I were delighted when he married Penny who brought fresh motivation to their work. They both are caring people who genuinely want to help others and have put much effort into giving people value and to investing in an appropriate manner to benefit carefully chosen charities. Along the way they have built friendships with many deserving people.

My association with the Trust arose from my mother's lifelong friendship with Rua. Clarrie and I became friends. He was a great character, full of life, amusing, outgoing and very capable. He was down to earth while Rua was sophisticated as well as friendly and outgoing.

When Clarrie wanted to diversify funds into Australia, I laid the

foundation blocks in the 1970s and continued to treat my assistance to Clarrie, Lee and the Trust as a duty of care until my retirement.

Kawkeb Sadik

Manager of ATWC Family Start (Anglican Trust for Women and Children) in Tamaki

I found out about a cooking programme for migrants and refugees when I met Penny some years ago. The programme appealed to me because I understood the challenges of being a migrant. I had arrived in New Zealand from Iraq in 1996 with my husband and two small children.

At that time I didn't know how to get the help I needed, so I studied social work to be able to help other migrants. As a frontline social worker at ATWC Family Start I started looking for support for migrant mothers and this is how I met Penny.



Kawkeb Sadik (second from right) with participants in the cooking programme for migrants and refugees.

With Penny's guidance and funding assistance from the Rua and Clarrie Stevens Charitable Trust, I started weekend cooking classes for women in Royal Oak in Auckland. The women who came loved them. They wore their national costumes and took turns each weekend to present their national dishes. They made friends and learned about helpful services such as where to have English language lessons and how to get work. They found the occasions empowering.

Penny has been a great support. I have gained confidence and widened my network of friends and associates. I went on to help run mother and daughter workshops, assisted with funding from Lee and Penny's Trust. Personally, it was a rewarding experience. I used to dread public speaking but now feel confident.

I had found it difficult to raise my children in a culture that was so different from my own. However, my involvement in the mother and daughter programmes helped me to communicate and share my feelings with my children. As a result they too are more confident about expressing their feelings.

Penny and I ran the mother and daughter workshops for the Anglican Trust, and they continue. The positive response from participants tells us they are very worthwhile.

David Eddy

Former Principal of Glendowie College, Auckland

The Rua and Clarrie Stevens Trust did an extraordinary amount for Glendowie College. Our long-lasting association began in the mid 1990s when Lee had heard the school's choral choir of mainly Pacific Island students singing at a church social. He was so impressed that he reached out to the school to ask how he could help.

I had arrived at Glendowie College to become the Principal in 1990 and had set to work with the staff to encourage higher levels of student achievement. I had exceptional performing arts staff who spent a lot of extra time with the students and Lee offered to provide support through targeted funding for the performing arts. Some of the funds were used to buy musical instruments for the college's concert band. A few years later the funding provided for a baby grand piano.

The college concert band went on to perform concerts and win prizes. By this time Lee had met Penny, and the band played at major Trust events and celebrations Lee and Penny hosted.

The association with Lee and Penny led to many mutually beneficial and enjoyable occasions. Lee arranged for Royal New Zealand Ballet workshops for our students and at no cost. He also arranged for an Opera New Zealand workshop at the school for students to produce and perform in a small opera based on 'Lucia de Lammermoor'. And thanks to complimentary tickets, students from the College were able to go every year to the opera.

A highlight for all of us at was when the then rising opera star, Simon O'Neill, sang 'Nessun dorma' at the school. Everyone, students and teachers, leapt to their feet to applaud him. In the years following Simon's visit, other emerging opera singers gave solo performances at the College.

Lee also paved the way to another fruitful association by introducing me to the Chief Executive of the Make a Wish Foundation. The College students performed a special sell-out performance of Romeo and Juliet and the money was donated to the Foundation.

The Rua and Clarrie Stevens Charitable Trust donated thousands of dollars to Glendowie College during our long association. Lee and Penny



Al Al Zubaidi, the 2011 recipient of the Stephen Dakers Memorial Scholarship.

were such enthusiastic supporters and the wonderful relationship they shared with the school continued for some years after I left, and Louise Moore became Principal.

Louise Moore

Principal of Sanctamaria College, Auckland and former Principal of Glendowie College

Lee and Penny met with us regularly to discuss the College's performing arts achievements. They were a very personable couple and outstanding stewards of the values and ideals inherent in the Rua and Clarrie Stevens Trust.

They were keen to help students with artistic ability and particularly those who were more deserving. The students welcomed Lee and Penny's interest and support. We all appreciated that Lee and Penny were extending a loving hand and not just writing out a cheque. The help from the Trust led to great results with some of the students gaining Bachelor of Music degrees and pursuing opportunities in the arts both locally and internationally.

Lee and Penny's support shifted as they saw the need. After a talented young jazz musician at the College, Steven Dakers, was killed in a car accident, they established a memorial scholarship in Steven's name.

They always looked for ways in which they could further help, and they widened their gifting as they went along. A lifetime of effort has gone into bringing communities together to support and promote the arts.

Robert Lahman

Former Arts Partnerships Manager for the Auckland Opera/New Zealand Opera, and the Royal New Zealand Ballet

In my roles with these performance arts companies I was responsible

for attracting and maintaining financial supporters from the corporate and philanthropic communities. The Rua and Clarrie Stevens Charitable Trust under the direction of their son, Lee, had become a long serving philanthropic trust in New Zealand. The Trust's financial support of the Royal New Zealand Ballet company through its contribution to the Partner A Dancer programme was substantial and a shining example of its commitment. During my more than eight years there, the Trust partnered with two of the best ballerinas of that period, Jane Turner and Alessia Lugoboni. Lee and Penny continue to stay in touch with them.

Lee and Penny asked for nothing in return for their support other than to be kept in touch with the company's developments and their dancers' progress into principal roles. Their support and desire to help was unlike any other sponsorship I had encountered. Both were keen and willing to be involved beyond the generous funding contribution from their trust. They got to know their sponsored dancer and found opportunities for them to socialise and perform at various private functions they hosted. Quite simply, Lee and Penny are passionate about helping develop talented young people and supporting good community causes. It has been a privilege and honour to work with them and the Rua and Clarrie Stevens Charitable Trust.

Mark Henaghan

Professor and Dean of Law at Otago University. 2000–2018.

When I was the Dean of Law at Otago University I had the great honour and pleasure of working with Lee and Penny on the Rua and Clarrie Stevens Charitable Trust.

It is an incredibly generous trust and has done so much for law students at Otago who received generous scholarship. That greatly boosted their



Robert Lahman and Penny.

From left: Mark Henaghan, John Smillie, Heidi Baillie (2011 Clarrie Stevens Memorial Scholarship recipient) and Geoff Thomas.



financial well-being and enabled them to focus on their studies. All of them have gone on to brilliant careers. Lee and Penny's passion to make the world a better place is infectious and I have always enjoyed working with their positive and enthusiastic attitude to life.

Geoff Thomas

Former Partner of the Otago law firm, Anderson Lloyd

Clarrie Stevens was a close friend of my fathers and a trustee of his estate, and subsequently a close friend of mine. By the time I had become a lawyer in 1970, Clarrie had left his original firm to set up his own law practice. However, I got to know him well through working with him over the years. For several years we shared professional offices. I met Rua, too. She impressed me as having strength of character. So did Clarrie. And they seemed totally in love.

When Clarrie retired in 1984, our firm, Anderson Lloyd, acquired his practice, CH Stevens. But I kept in touch with him after he moved to Auckland and until he died. Since the law scholarship in memory of Clarrie was established, I have assisted with the legal side and chaired the awards panel. The scholarship blends academic ability with financial need.

It is excellent that Lee is determined to continue the scholarship.

Bronwyn Bailey

Lawyer and former recipient of the Clarrie Stevens Memorial Scholarship

I was the fortunate recipient of the Clarrie Stevens Memorial Scholarship in 2017. Funded entirely by the Rua and Clarrie Stevens Charitable Trust, the scholarship is awarded to a final year law student each year at the University of Otago. The scholarship's namesake, Clarrie Stevens, was a prominent Dunedin lawyer who specialised particularly in commercial law.

The scholarship came at a pivotal point during my studies. I had become ill midway through the first semester in 2017. My course load was too heavy for me to recover properly and medical appointments resulted in sporadic lecture attendance. I halved my course load from six papers to three. Several weeks later I was notified that I was no longer eligible for living costs under my student loan as I had fallen below the minimum course credit threshold. Although I was tutoring, my earnings were insufficient to cover my expenses for semester two.

I applied for the scholarship.

Six months later I met Lee and Penny at the scholarship award ceremony in Dunedin. Their kindness, compassion and zest for life left me feeling as if I had known them for years. I have loved getting to spend more time



Bronwyn Bailey

with them since my move to Auckland.

I moved to Auckland in early 2019 to practice commercial law in the finance team at Chapman Tripp. At 22, when applying for the role, I wasn't sure on the career I wanted for the rest of my life. But applying for and receiving the scholarship helped steer my career direction as I realised not only did I have an interest in commercial law but that I was also good at it. I also realised those who are in position of privilege have to find a way to give back and support those who need help. The most satisfying part of my commercial law career is the opportunity I have to use my skill set and network to help others.

The Clarrie Stevens Memorial Scholarship had a major impact on my studies at an important juncture. I hope to be able to pay the favour forward to another young student one day.

Shawn Reddy

Chief Executive Officer, Te Whakaora Tangata

This year marks 10 years of Te Whakaora Tangata serving some of the most vulnerable families in South Auckland and, more recently, the Far North. We address the deep-rooted issues of trauma that cause family dysfunction, bringing hope, restoration and dramatic change to the lives of our whānau.

We are privileged to have seen over 1,200 families restored over the last ten years, and to now watch the next generation of children engaging in work and study opportunities otherwise unheard of for families such as theirs. This is a true testament to our vision to see once vulnerable families living well and children given every opportunity to reach their full potential and shows that we can make long-term intergenerational change in a community when we partner together.

There is an ever-increasing competition to acquire funding in the charity sector, due in part to many large funders being oversubscribed. We value the support of small funders, such as the Rua and Clarrie Stevens Charitable Trust, as along with their consistency and stability, relationship is at the centre of the way they operate.

Without the support of the Rua and Clarrie Stevens Charitable Trust, we could not do this much-needed work. Through the unwavering dedication and commitment of the Trust, we have been able to successfully deliver our life-changing programmes that have brought hope and restoration to over 200 families each year. The funding we have received for staff and vehicle expenses towards our Family Restoration Programme has enabled our team to expand in capacity to better serve our clients and equipped us to reach those in desperate need of our 24-hour Crisis Intervention programme.

We are grateful to Lee and Penny Stevens for the aroha, generosity, and heart for making a difference they continually show towards the whānau in our community and we look forward to the transformation that we can bring together to those in need.

Melody Mobsby

General Manager Auckland Foundation

While some donors prefer a hands-off approach to their giving, Lee and Penny have always taken a personal interest in the work of their grantees and the positive change it has made for communities. Since they first started granting from the Rua and Clarrie Stevens Charitable Trust 50 years ago, they have established long-standing relationships with many of the organisations they support. In particular, their long-term support of the Auckland Philharmonia (APO) is a wonderful example of a strong

funder–grantee partnership.

Auckland Foundation currently administers 50 Funds, including the Rua and Clarrie Stevens Charitable Trust which resettled with Auckland Foundation in 2015.

Through our governance and administration services, donors can focus on the transformation they want to create in areas they care about. Each Fund has its own clear charitable focus and unique mission to build a lasting legacy for Auckland and its communities.

Ken Whitney

Chairman of Philanthropy NZ, trustee of Auckland Foundation, Auckland Health Foundation and the Chisholm Whitney Charitable Trust.

One of my first memorable experiences when I joined the Board of Auckland Foundation in 2017 was meeting two very charming and passionate philanthropists, Lee and Penny Stevens, and being introduced to the work of their family’s philanthropic fund, the Rua and Clarrie Stevens Charitable Trust. I learned that this remarkable trust had been established by Lee’s father nearly 50 years ago and his work has been lovingly continued and expanded by his son Lee and Lee’s wife, Penny over many years. It is a wonderful story of inter-generational giving which started in a small way and which, under Lee and Penny’s careful stewardship, has grown into a much more substantial enterprise. The Fund is now largely managed by Auckland Foundation supported by granting advice from Lee and Penny.

It is a great example of the power of growing a long-term commitment to supporting a huge variety of worthwhile causes in our community which touch and enrich us all. Lee and Penny’s energy and enthusiasm for their philanthropy is demonstrated in the obvious joy and fulfilment

they feel through their inspiring work. They have always made a point of getting to know the people they help and sustaining their support over a long period. I am delighted that Lee and Penny have chosen to tell their story in this book, as it is an uplifting example of their love of humanity, which is the very definition of philanthropy.



Grantees and friends gather with Lee and Penny in their garden to celebrate another year of the Trust.

TRUST GRANTS 1971–2020

1971

Mornington Play Centre
Salvation Army
Otago Hospital Board
NZ Ballet
St John's Ambulance (Otago)
Anglican Church (Dunedin)

1972

Red Cross Society (Nth Otago)
DN Diocesan Trust
St Michaels Anglican Church – Andersons Bay
Institute of the Blind
Otago & Southland Play Centre
Paraplegics Society
Otago Girls Guides
Himalayan Trust

1973

Emergency Advice Service
Henley Community Centre
St Barnabas Home for the Aged

1974

NZ Red Cross – Ethiopia Fund
St Luke's Church – Oamaru

1975

Paraplegic Endowment Fund
Dunedin Heart Unit Trust
Youthline – Dunedin

1978

Southern Ballet Trust

1979

Arthritis & Rheumatism

1980

St Clair Home School Association
St John's Anglican Church – Dunedin
Save the Children Fund

1981

Disabled Persons
NZ Speech Therapists

1982

Dunedin Community Child Care

1983

St Kilda Band

1984

St John's Hospitaliers
Mater Hospital – Dunedin
Spirit of New Zealand
National Cot Death – Auckland
St Vincent De Paul
Assumption Sisters
St Mary's Parents Association
NZ Brass Bands.
Brockville Drop-in Centre (Dunedin)
St Francis Assisi
St Paul's Choral Fund
Friends of First Church – Dunedin
Paramatta Girl Guides
St Joseph's Church

1985

Kaituna Bowling Club
Andersons Bay Kindergarten
Para Bay Centre

1987

Christian Fellowship
Oamaru Hospital Board – Children's Toys

1988

Cancer Society – Dunedin
Friends of Mercury
Oamaru Art Gallery

1991

Christian Outreach

Otago Community Hospice
Leukaemia Foundation
Neighbourhood Nursing Trust
Asthma & Respiratory Foundation
Muriwai Farm Trust

1992

Lifeway Trust
Boys Brigade
NZ Crippled Children
National Child Health Research Fund
Make-A-Wish Foundation

1993

Glendowie College
St Philips Anglican Church – Auckland
Barnado's
NZ Women's Refuge Foundation
Remuera Rotary Community Projects
Paparua Charitable Trust

1994

Mary Potter Hospice – Tom's story

1995

Home & Family Society – Christchurch
Young Musicians Competition
Parenting with Confidence

1996

NZ Association of Philanthropic Trusts
Society Mary Trust Board – Chris Skinner
Opera New Zealand
Christchurch Symphony Orchestra
Lifeline – Auckland

1977

Citizens Advice Bureau
Living Springs Trust
St Joseph's Mercy Hospice – Auckland

1998

Epilepsy Association – Rotorua

Home & Family Society – Auckland
Royal NZ Plunket Society
NZ Opera Training School

1999

Clarrie Stevens Memorial Law Scholarship
St John's Rotary Sailing Scholarship
Northern Kindergarten Association
Project Ki Trust
Koru Care Trust – Children with Leukaemia
Parish of the Islands
St Benedict's Parish – Auckland
Auckland Youth Orchestra
North Shore Performing Arts Company
New Horizon For Women Trust
Counselling Service Centre
Foundation for the Blind – Homai Centre

2000

Challenge 2000
Moana Pool Development – Dunedin
North Shore Educational Trust

2001

Recovered Materials Enterprise Trust
St John's Rotary
Storylines
Voices New Zealand
Auckland Philharmonia Orchestra
Carols by the Sea
Tamaki Pathways Trust

2002

Arts Access Aotearoa
New Zealand Youth Choir
Shakti Conference

2004

Maxim Institute
United Way
Zero Waste
Chinese Garden Trust – Dunedin

BPW Conference

Otago Employment Trust

Otago Youth Wellness Trust

Envision Trust

The Black Grace Trust

2005

Auckland Somali Community

2006

Crystal Cathedral Ministries NZ Trust

Entrust Foundation

Glen Innes Catholic Church

Te Waipuna Puawai Mercy Oasis

YWCA

2007

Auckland Festival Trust

BPW – Tsunami Re-development Fund

Papatoetoe Cricket Club

Papatoetoe High School

Project Awhi

Prison Fellowship

2008

Matihetihi Ki Tamaki – Church renovations

BPW Club – Ethnic Project

Ahipara Primary School Habitat Project

Ruapotaka Marae

APO Summer School Programme

The Bushland Trust

Houanga Rongo

2009

Dunedin Community Law Centre

Launchpad – Dunedin

Cooking & Friendship Class

Remuera Baptist Trust

2010

Ethnic Employment Educational Trust

Stellar Trust

Samoa Tsunami

2011

Tamaki College – Te Poho o Tamaki Maori

Performing Arts Academy

Tamaki College – Arts, Music

I AM GI – Glen Innes Arts Programme

The Liberty of Being Me Foundation

NZ Dance Festival Trust

Tewa – Nepal

Nagarik Aawaz

NZ-Asia Association (NZ Asia Multi-cultural concert)

2012

Sampana Campaign – Nepal

2013

Creative Youth Society-Nepal

2014

Mixit

2015

Te Whakaora Tangata

2017

SARN – Nepal

2019

Victim Support (Muslim community, Christchurch)

2020

Little Sisters of the Poor-Dunedin

Auckland University-Kupe Leadership Scholarship