



**2015
2019**

COMMUNITY INVESTMENT STRATEGY



Integrity and Honesty

We act in good faith
and are prepared to
be held accountable

2015-2019 COMMUNITY INVESTMENT STRATEGY



Since its formation in 1993, WEL Energy Trust has supported WEL Networks to return more than \$240 million to WEL Networks customers through electricity bill discounts, and has also invested nearly \$60 million through community and energy efficiency grants.

Over \$2 million is invested each year to support well over 200 community organisations.

OUR VISION

A forward thinking,
vibrant, connected
community

OUR CORE PURPOSE

Growing Investment
for our Community

OUR STAKEHOLDERS

The people and
communities of the
WEL Energy Region in
the Waikato

OUR VALUES

1

PURPOSE DRIVEN

We look for projects
that deliver clear,
positive outcomes.

2

RESPECTFUL

We will openly
and fairly listen to
and consider the
opinions of each
other, and our
stakeholders in the
community.

3

EMBRACE POSITIVE CHANGE AND SEEK CONSTANT IMPROVEMENT

The Trust values
initiatives and
organisations that
are prepared to
challenge the status
quo and strive
to achieve their
outcomes.

4

INTEGRITY AND HONESTY

We act in good faith
and are prepared to
be held accountable.

5

CLEAR, CONSTRUCTIVE COMMUNICATION

We create
understanding
through open
and informative
engagement.

A woman with short blonde hair is smiling and looking down at a young child. The child is wearing a dark baseball cap and is focused on playing with a set of toys on a table, which includes a white toy car and some blocks. The entire image is covered with a semi-transparent blue filter. In the upper right corner, there is a dark blue speech bubble containing white text.

Purpose Driven

We look for projects
that deliver clear,
positive outcomes

OUR STRATEGIES

1

TO MAXIMISE LONG TERM IMPACT BY BEING STRATEGIC AND TRANSFORMATIVE

We plan to allocate grants strategically to achieve our Vision. We will investigate where our funding can be most effective and has the best opportunity to make a long term sustainable difference, and allocate funds accordingly. The Trust wishes to focus on transformational funding, which means we will give priority to initiatives or organisations that can demonstrate they are impacting or enhancing:

- Individual's lives - providing high and/or broad impact;
- Organisations - capacity building and encouraging collaboration;
- The community - preventing issues from occurring;
- People's views - by delivering strong regional pride.

Partnership (or Multiyear) Funding will be developed, where selected organisations in a related area will be offered support over 3 to 5 years to impact on a priority area as identified by the Trust based on research of our region.

2

EXPAND SUPPORT BEYOND GRANTMAKING

WEL Energy Trust is looking at ways we can support communities in addition to Grantmaking – developing a 'toolbox' of other community support mechanisms.

Community Loans are one way of utilising our funds for community benefit without losing ownership, and will be continued. We will also encourage and support evaluation exercises and learnings, looking for continuous improvements in programmes and practices in our identified strategic outcome focus areas.

To assist communities in developing their full potential and to find answers to complex issues and encourage better ways of working together, we will continue to support collective efforts, and may lead projects or collaborate with others to make an impact in the identified priority areas. The Trust will look for new ways to support the economic, social and physical wellbeing of the community.

3

GOVERN THE TRUST EFFECTIVELY AND EFFICIENTLY TO BE RESPONSIVE TO OUR COMMUNITY

We recognise the need to align our resources with our strategic intent, and to regularly monitor, review and improve our governance and management practices. This includes ensuring the effectiveness of our investment regime and managing investments and risks in a diligent manner.

We will use best practice principles to ensure effective delivery of our Vision, to communicate effectively, and to respond to the needs of our community. This will include the development of a new quick response fund for smaller grants, and a move from one to three main grants rounds per year.

OUR STRATEGIC OUTCOME AREAS

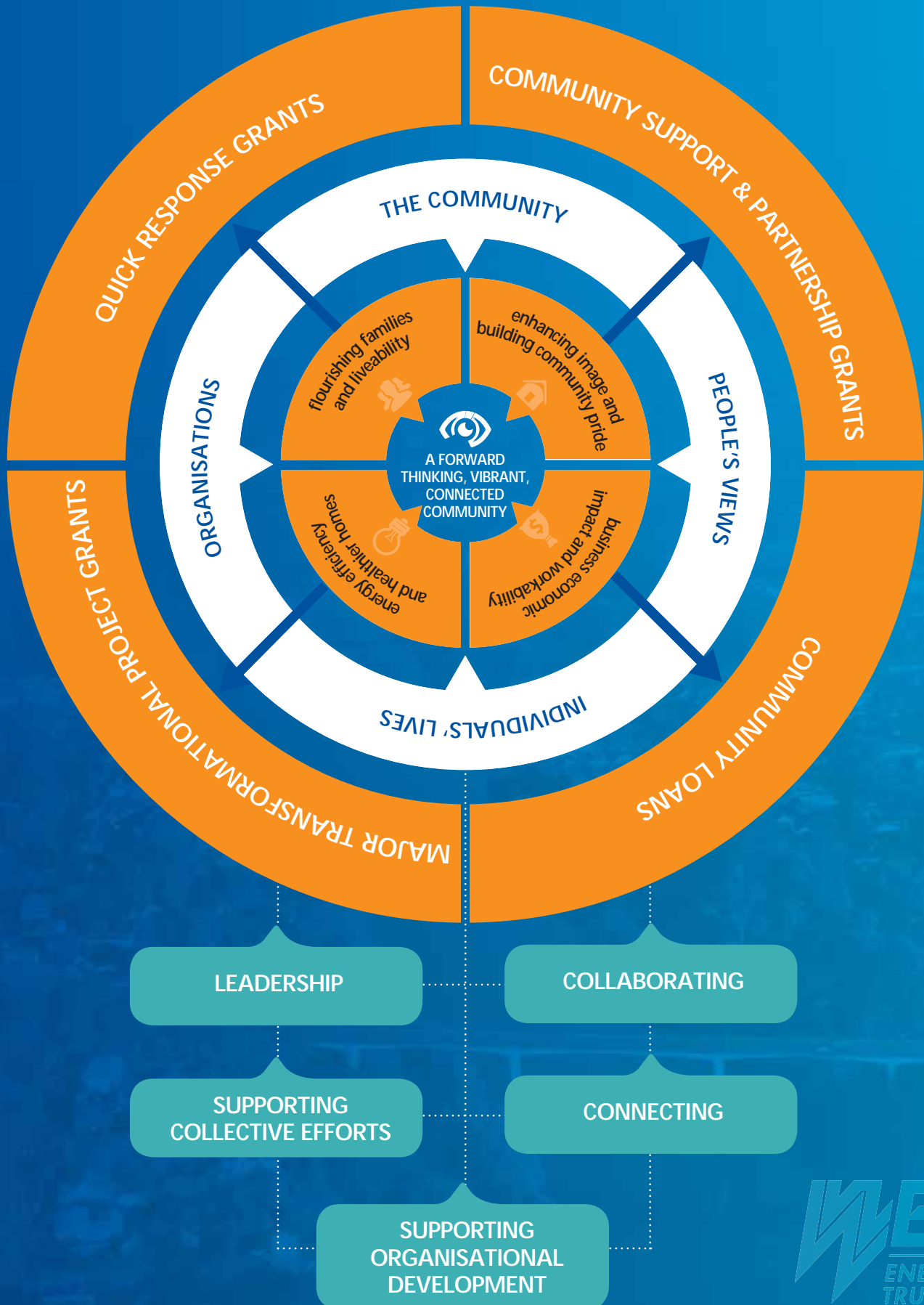
For all applications, priority will be given (in no particular order) to those that:

- Fall within the strategic priority areas for the Trust, or meet more than one strategic objective;
- Are likely to have wide reach or high impact;
- Are likely to offer a “multiplier effect” through collaboration;
- Balance need with impact and outcomes;
- Are likely to lead to transformational change;
- Are from organisations that do not have significant independent fundraising abilities, or whose projects are unlikely to go ahead without Trust support.

	FLOURISHING FAMILIES AND LIVEABILITY	ENHANCING IMAGE AND BUILDING COMMUNITY PRIDE	BUSINESS / ECONOMIC IMPACT AND WORKABILITY	ENERGY EFFICIENCY AND HEALTHIER HOMES
OBJECTIVES	To transform the region into the most family friendly in New Zealand, with high levels of participation and cohesion.	To enhance the image of the region and instill pride in the Waikato as a place to invest, work, live, play and study. This includes events, arts, or projects that showcase the strengths of the Waikato.	To promote employability, attract skilled staff, or improve the business and economic opportunities in the region.	To promote energy efficiency and healthier homes.
HIGHER PRIORITY	Organisations, projects or initiatives that promote connectedness, provide healthy activities, encourage participation, or support disadvantaged groups in the community. Projects that will prevent problems arising.	Activities, projects, events or facilities that instill a sense of pride in the community, or raise the community profile nationally or internationally.	Organisations or projects that will help address income disparity in the region by attracting sustainable business and economic activity or that promote the work readiness of the community and/or lift educational opportunity.	Applications that represent innovative projects, or provide financial efficiencies for organisations, or that focus on families most in need, or that are likely to have a long term impact on health and/or the environment.
LOWER PRIORITY	Firmly established projects or organisations that have reached self-sustainability, those that duplicate services elsewhere or do not demonstrate impact.	Firmly established events, projects or organisations that have reached self-sustainability or that do not demonstrate reach or impact.	Projects with limited economic benefit to the region, or that will impact areas that will not add to the unique value proposition of the region.	Projects that do not provide significant efficiency or innovation or that have limited impact or reach in the community.

FUNDING STRATEGY

2015 -19



THE FUNDING FRAMEWORK

HOW WE WILL FUND:

We want to hear from not-for-profit organisations committed to delivering projects or initiatives that will enhance the lives of people in our community.

There are two main funds to apply to:

QUICK RESPONSE GRANTS

FOR UP TO \$5000

COMMUNITY SUPPORT GRANTS

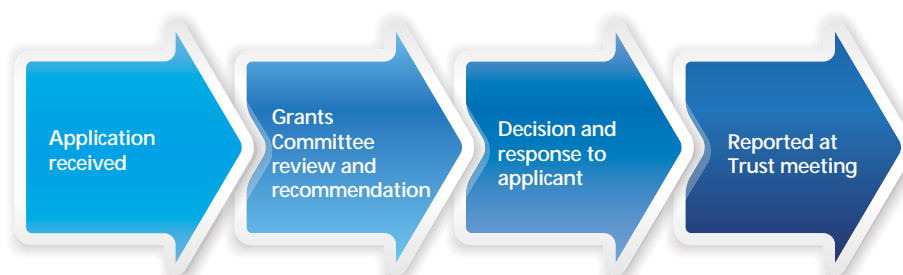
FOR GRANTS ABOVE \$5000

QUICK RESPONSE GRANTS

(Up to \$5000, starting April 2015)

WEL Energy Trust will support our community through regular community grants to a wide range of organisations in the WEL Networks region. Applicants can be guided by our policies and priorities as advertised on our website. There will be five closing dates per year for the "quick turnaround" grants for up to \$5,000 (February, April, June, August, and October). Only one grant of any kind per organisation can be allocated in a calendar year, except in exceptional circumstances.

PROCESS FOR QUICK RESPONSE GRANTS APPROXIMATELY 6 WEEK TURNAROUND



Grantee Reporting: The Trust requires a short accountability statement from grantees outlining how the funds have been used, and this must be submitted within the time specified on the grant letter. This is done through a short on line form on our website.

COMMUNITY SUPPORT GRANTS

(\$5000 and over, starting June 2015)

We are currently working on a number of issues that affect our region and that will be a focus when prioritising how Community Support grants for \$5,000 and above are allocated. There will be three closing dates per year for Community Support grants (March, June and September). **Partnership Funding** (or multiyear support) may be offered to applicants to this fund with a high impact in the Trust's focus area and a history with the Trust.

Only one grant of any kind per organisation can be allocated in a calendar year, except in exceptional circumstances. Applications will be assessed against the identified focus areas in the Trust's strategic plan.

FOCUS AREAS INCLUDE:

- 1 Flourishing Families and "liveability"
- 2 Community Pride - Enhancing the image of our region and "visit-ability"
- 3 Business / Economic impact and "workability"
- 4 Energy Efficiency and Healthier Homes

The Trust wishes to focus on transformational funding, which means we will give priority to initiatives or organisations that can demonstrate they are impacting or enhancing:

- Individuals' lives - providing high and/or broad impact
- Organisations - capacity building and encouraging collaboration
- The community - preventing issues from occurring
- People's views - delivering strong regional pride.

PROCESS FOR COMMUNITY SUPPORT GRANTS (\$5,000 AND ABOVE) – APPROX 12 WEEK TURNAROUND



Grantee Reporting: The Trust requires an accountability statement from the grantees which outlines how the funds have been used, and any measures of impact that can be shared. This must be submitted within the timeframe specified on the grant letter. The form can be found on our website.

Recipients of Partnership (Multiyear) funding may also be invited to provide informal verbal feedback in a roundtable discussion with a view to celebrating successes, sharing ideas and challenges, and providing an opportunity for networks to be developed.

OTHER FORMS OF INVESTMENT IN THE COMMUNITY



1

MAJOR TRANSFORMATIONAL PROJECT GRANTS

The Trust is interested in being a pro-active collaborator in funding significant projects that will have a direct positive impact on the economic and social wellbeing of the region. These Major Transformational Grants will only happen when funds allow and are likely to be significant regional projects that will have intergenerational impact and wide benefit.

The Trust is open to expressions of interest at any time, and when funds allow, a call will be made for more in depth applications in December with a decision made in February. A process similar to the Community Support Grants will be followed to identify the projects that are the best fit for the Trust's strategic priorities.

2

PARTNERSHIP (MULTIYEAR) FUNDING -TRUST LED AND COLLABORATIVE PROJECTS

To assist communities in developing their full potential and to find answers to complex issues and encourage better ways of working together, the Trust will continue to support collective efforts, and may lead projects or collaborate with others to make an impact in the identified priority areas. This may involve bringing related groups together through Partnership (multiyear) funding.

Multiyear (or Partnership) Funding is by invitation only and involves selected organisations in a related area being offered support over 3 to 5 years to impact on a priority area as identified by the Trust and informed by research. Organisations selected are likely to have been funded by the Trust in the past, and to have high impact in the Trust's strategic priority areas.

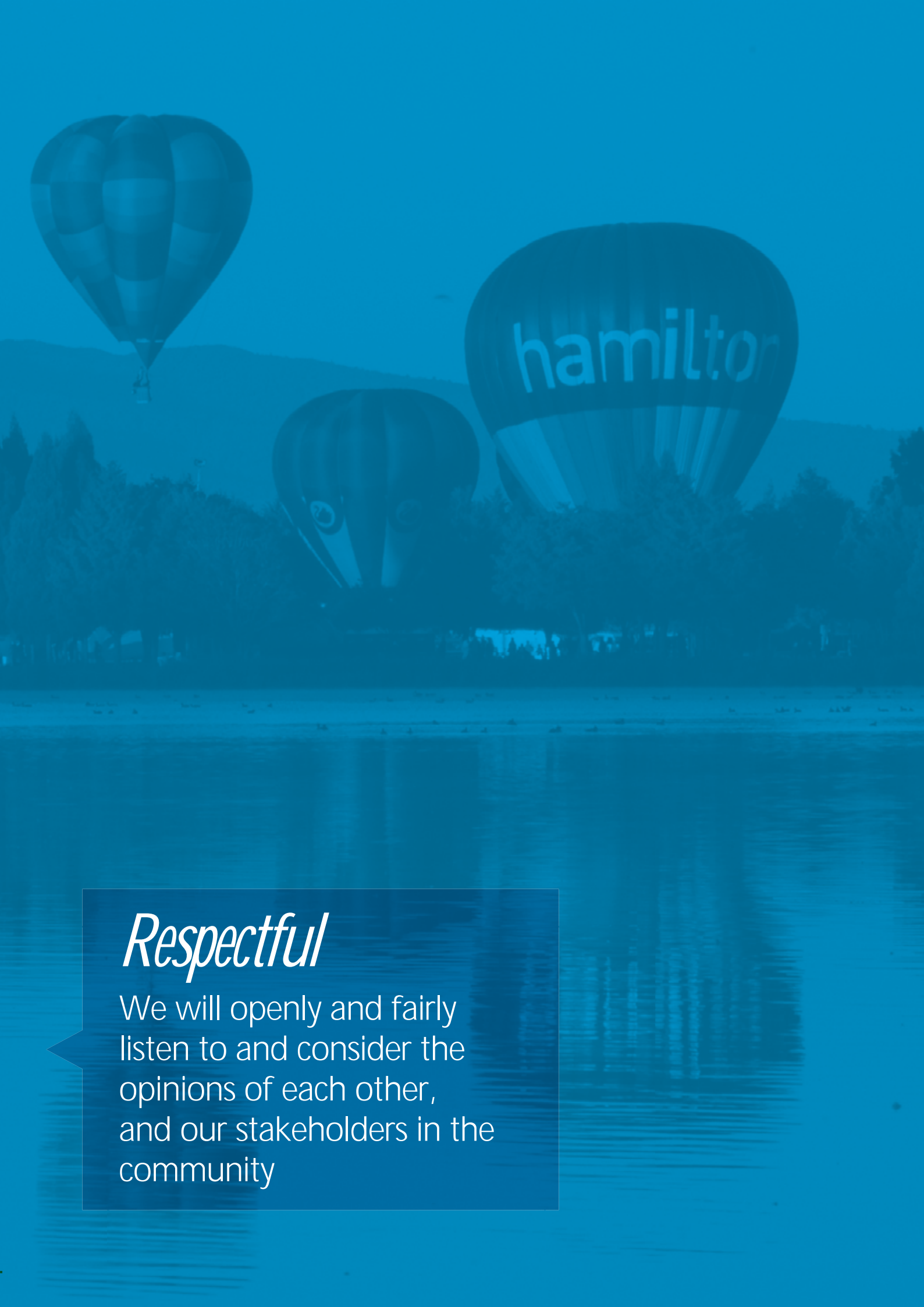
3

COMMUNITY LOANS

The minimum for any one loan is \$50,000 and the maximum is \$500,000. Details of criteria and the application process can be found on the Trust's website.

The aim of the community loans is to provide a flexible option for organisations, particularly when undertaking larger capital projects.

*Guidelines and criteria can be found on the Trust website



Respectful

We will openly and fairly listen to and consider the opinions of each other, and our stakeholders in the community



360 Tristram Street, Hamilton
PO Box 1336, Hamilton 3240
P. 07 838 0093 | E. admin@welenergytrust.co.nz
www.welenergytrust.co.nz
www.facebook.com/WelEnergyTrust

'Here for the Community'