

Giving *for* **Good**

The history of the
JR McKenzie Trust

Stephen Clarke

Giving *for* Good

*Iti noa ana,
he pito mata.*

With care, a small
kūmara will
produce a harvest.

Giving *for* Good

The history *of the*
J R McKenzie Trust

Stephen Clarke





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Glossary of Māori kupu

Ara : pathway, road

Awhi rito : the two flax shoots which hold the center shoot, often likened to the parents

Hapū : sub-tribe

Harakeke : NZ Flax

Hine : girl

Hui : meeting, gathering

Iwi : tribe

Kaihāpai : mentors

Kaikōkiri : leaders in promoting advocacy with the community to champion (a cause), promote, advocate, lead

Kaitohutohu : advisor who directs, instructions or recommends

Kaumātua : elder

Kaupapa : topic, subject

Kaupapa Māori : ideological principle of research and works being conducted by Māori, with Māori, for Māori. This includes Māori thinking, values, knowledge, language, cultural protocols and views of the world providing the basis of these endeavours

Kōhanga reo : Māori language immersion preschool

Kūmara : NZ sweet potato

Kura kaupapa : Māori language immersion school

Mahi : work, job

Mana : prestige, standing, authority

Mana whenua : the occupation, authority of the land

Manaakitanga : sense of hospitality, generosity towards others

Marae : communal and sacred traditional Māori complex of carved buildings

Mātauranga Māori : traditional Māori knowledge and teachings

Moemoeā : vision, dream

Mokopuna : grandchild

Ngāti : prefix word denoting a tribe or sub-tribe

Oranga : life, well being

Pou : pillar

Pou ārahi : leading pillar of support and guidance

Rangatahi : youth generation

Rangatiratanga : authority, autonomy

Taiohi : young people

Tamariki : children

Tangata : person

Tangata whenua : Home people, people of the land

Tāngata : people (plural of tangata)

Tangi : to cry, mourn, a traditional Māori form of funeral

Te anga rautaki : strategic framework

Te ao : the world

Te ao Māori : the Māori world

Te ao tūroa : the natural world

Te reo : the language

Te Whare Rūnanga : Traditionally carved house of assembly at Waitangi

Tikanga : customs and rites

Wāhine : women

Wairua : soul, spirit, essence

Waka : canoe

Wānanga : to discuss, a forum, place of learning — these days being university

Whakataukī : proverbial saying

Whānau : the family unit, including wider family

Whare : house, building

Acknowledgements

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For her manaakitanga with this project, I am indebted to J R McKenzie Trust executive director Robyn Scott. Former executive director and current director of the Peter McKenzie Project, Iain Hines, was both dutiful and insightful in his comments on drafts throughout the project. I thank McKenzie family members for their significant contributions. J R McKenzie Trust chair Manaia King and past chairs Dame Diana Crossan, Jennifer Gill and David Hurley all provided valuable insights. Lesley Carmichael shared her recollections as a personal secretary to Sir Roy McKenzie and as the last national secretary to the Trust. Marama Tākao ((Ngāi Tūhoe, Te Āti Awa, Ngāti Rārua, Ngāti Toa Rangatira, Ngāti Tama, Ngāi Tahu) checked for the correct use of macrons and Mason Lawlor (Ngāti Pāhauwera, Ngāti Maru, Ngāti Manu) provided the kupu glossary definitions. Imogen Haliday has been invaluable in undertaking additional research and in leading the photographic research. Sophia Bishop of Studio Acht has contributed the original cover artwork that illustrates the giving legacy of the J R McKenzie Trust. Editor and designer Lynn Peck of Writes Hill Press Ltd is to be congratulated for delivering this splendid-looking book.

On a personal note, I wish to thank my partner Mel Bailey for her ongoing support.

Stephen Clarke

March 2022



P r e f a c e

Giving for Good

MckENZIES was a well-known department store name during much of the 20th century. Its bright red 'McK' logo was synonymous with good value. What is less known today was that its founder, J R McKenzie, provided a gift to the nation that became a legacy of giving for good. This is the story of the J R McKenzie Trust.

By 1940, J R McKenzie had achieved phenomenal business success during his 30 years in New Zealand and was running the largest retail organisation in the country. He had come from humble beginnings in Australia and now it was time to give back to his adopted country. His beloved Rotary and its ethos of 'Service Above Self' was the inspiration, and Rotary would be the agents of his giving as he established the J R McKenzie Trust in perpetuity, assisted by its majority shareholding in his investment company Rangatira Ltd, with a gift of £100,000 to mark the New Zealand Centennial in 1940. It was described at the time as a 'munificent gift' and one that would continue to deliver social good for generations.

During the 1940s and 1950s the J R McKenzie Trust assisted returned servicemen to rehabilitate and helped children fatherless because of the war to be given every chance of a normal life; it helped Plunket to raise the post-war baby-boom generation; and it assisted a wide array of voluntary social organisations to support their communities and help those in need. By the time of his death in 1955, Sir John McKenzie's Trust had already made its mark on the philanthropic landscape, and his son Roy McKenzie would continue its legacy.

The J R McKenzie Trust started the 1960s a trusted philanthropic organisation and it was steady at the helm throughout the decade. From the early 1970s the Trust changed tack under its new chair Roy McKenzie, who would bring his own business acumen, energy and personal philosophy of connected and creative giving to the Trust. It was the start of a significant consolidation of the McKenzie family legacy of giving.

The 1980s was the start of a generational change in society from the war to the post-war generation. Roy McKenzie retired as chair of the J R McKenzie Trust, although not from giving, while the third generation, John and later Peter McKenzie, came on board. The advent of co-opted trustees reflected the widespread entry of women into public life and the Māori renaissance during the 1980s as the Trust sought to connect with new communities and issues. In the decade that followed the Trust itself was still meeting traditional needs as the economic recession and government retrenchment placed a strain on the community and social services sector, but under its first woman chair was shifting its sights at the dawn of the new millennium to a new age of giving in Aotearoa.

By the 2000s, the J R McKenzie Trust recognised that in an increasingly crowded field it had an opportunity to give more strategically. It was the start of regular five-year reviews and strategic plans, more multi-year funded projects, and the need for more staff to work with its supported groups and communities on bringing about systemic change. A period when the Trust sadly lost Sir Roy McKenzie in 2007 as well as Lady Shirley and Peter McKenzie in 2012; but welcomed on board the fourth generation of the McKenzie family. From 2010, the Trust made a significant shift from grant maker to many groups to strategic funder of fewer for greater social good.

Today, after 80 years and with a new ten-year strategy, *Te Anga Rautaki*, the J R McKenzie Trust is a modern and still significant giving organisation seeking to bring about transformational change in society in partnership with ngā kaikōkiri.

This book tells the J R McKenzie Trust story of harnessing a gift into a legacy of giving, and how it is continuing to blaze a trail to achieve its vision *kia hua mai he whenua ka toko i te tika me to pono hei korowai mō Aotearoa*: a socially just and inclusive Aotearoa New Zealand.



**“He was a New Zealander
and one of our finest citizens,
who made an outstanding
contribution in many directions
to the life of our country.”**





Prologue

J R McKenzie

A life and a legacy

“He was a New Zealander and one of our finest citizens, who made an outstanding contribution in many directions to the life of our country. His sterling character, his desire to help his fellow men and the establishment of his magnificent trusts, made him one of our greatest citizens.”

Rt Hon Sidney Holland, prime minister of New Zealand, 1955¹

It is indeed a testament to the contribution to New Zealand society that the prime minister in paying tribute at the time of the death of Australian-born Sir John McKenzie would refer to him as ‘a New Zealander and one of our finest’. The Victorian country-boy, who left school at the age of 13 to deliver newspapers, served in the South African War, started and sold a business in Melbourne, and then started anew in New Zealand and succeeded in building the largest retail organisation in the country. When he died in 1955, he was reputed to be one of New Zealand’s wealthiest men and one of its greatest philanthropists. His living legacy was the J R McKenzie Trust that continues to have a social impact in Aotearoa New Zealand.

Early life

John Robert Hugh McKenzie was born at Yarrawalla, northern Victoria, Australia, on 5 August 1876. He was one of seven children of Hugh, a customs officer, and Susan (née Smiley) McKenzie, immigrants from the Scottish Highlands fishing village of Ullapool, near Inverness. Life was not easy financially for the McKenzie family and John left school at 13 years to earn money for the family, taking on odd jobs, including selling newspapers. His lifelong career in retailing began when at the age of 14 years he was employed, in Melbourne, by Jacob Hart and Company. In his leisure time he was a keen cyclist and generally enjoyed the outdoors.²

At the outbreak of the South African War in 1899, John, now aged 23 years, enlisted in the 3rd Victorian Bushmen Contingent; he had learned to ride horses on the farm of his uncle, who now provided him

Previous page:
J R McKenzie, 1929.
Alexander Turnbull Library



with his mount. He served in South Africa for two years and was wounded when his horse was shot from under him in 1901. After convalescing he returned to retailing in Melbourne.

By 1905 John had saved £100, and with his sister, Ella, opened his first shop selling fancy goods. Less than a month after the business had been established the building and most of the stock were destroyed by fire. The McKenzies held a fire sale, which was such a success that John was forced to purchase extra stock. He learned a lifelong lesson that good prices led to a rapid turnover, and that making a small profit on a large number of items was sound business practice. Within 12 months the McKenzies had not only re-established the first store, but had also opened a second. During this period Ella married John McKenzie's accountant, George Carter, a close friend and business associate until the latter's death in 1935. After selling his Melbourne shops to a competitor, Edmonds Ltd, on the condition that he ceased to trade in Melbourne, he opened fancy goods stores in Launceston, Tasmania and Sydney.

J R McKenzie (front row, left)
with a group of Victorian Bushmen,
South African War, Bamboo Creek,
South Africa, 1900.

J R McKenzie Trust

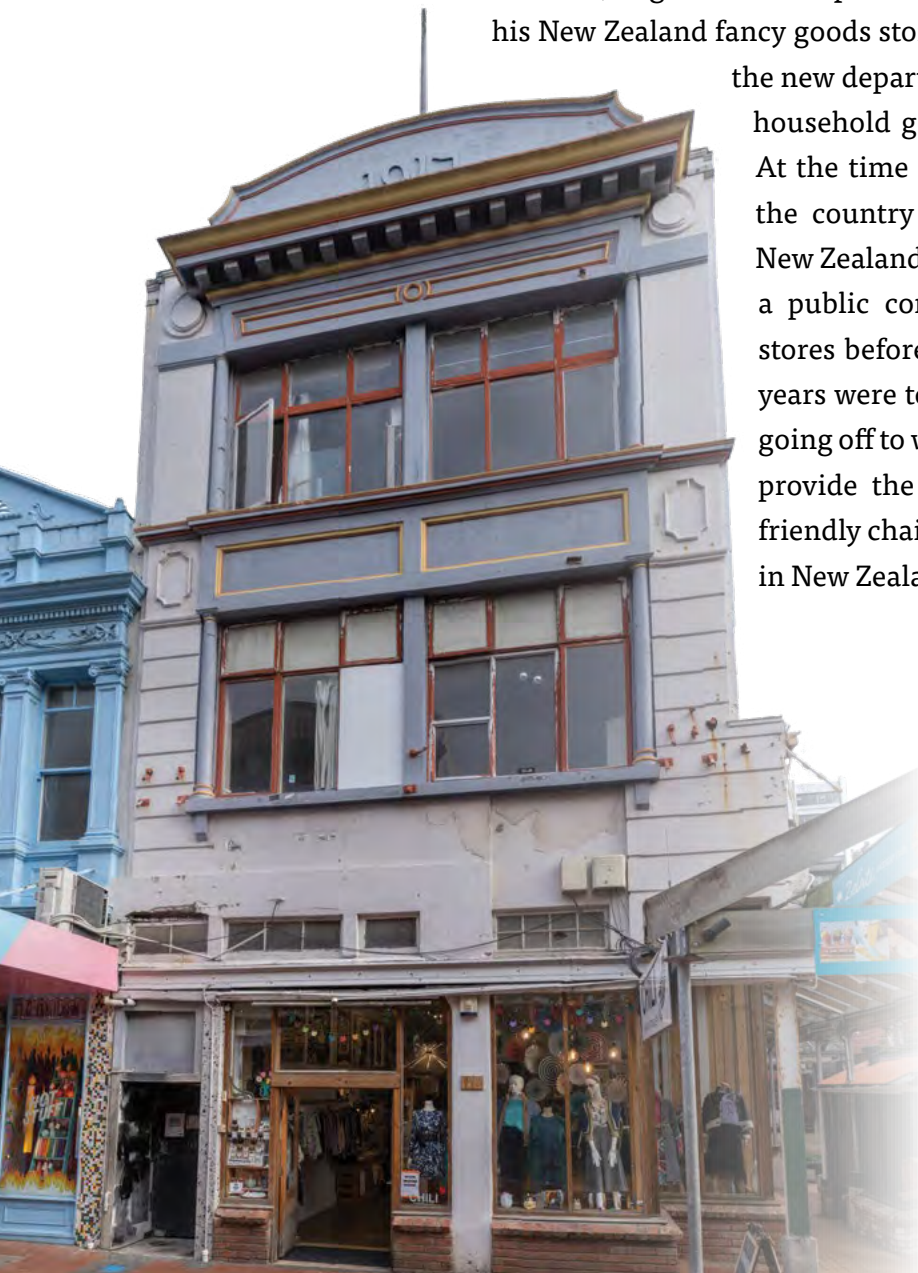
McKenzies stores

On a motorcycle holiday in New Zealand in 1909, McKenzie was so impressed with the country and the opportunities it offered that he decided to relocate his business. The first McKenzies store was opened in Dunedin in 1910. A branch in Christchurch followed, with a third store being opened in Wellington in 1912. By 1928, and with now 22 McKenzies stores throughout the country, a head office was opened in Wellington. McKenzie travelled extensively abroad on stock-buying tours, and on a visit to America in 1928 observed the development of low-cost, high-volume department stores. Within two years, all 22 of his New Zealand fancy goods stores had been relocated and converted to

the new department store model now selling clothing, household goods and a wide range of other goods. At the time it was the largest retail organisation in the country and became the pattern for much of New Zealand retailing. In 1936 the company became a public company, with further expansion to 33 stores before the outbreak of war in 1939. The war years were tough, with import restrictions and staff going off to war. After the war, the baby boom would provide the conditions for the McKenzies family-friendly chain of stores to become a household name in New Zealand.

The first purpose-built store at 16 Cuba Street, Wellington, opened in 1917 and by 1928 accommodated the company's first head office. This building also has historic significance as one of the earliest commercial buildings designed and built by Fletcher Brothers.

Imogen Haliday



Family life and Roydon Lodge

At the start of the First World War, John wanted to serve overseas again, but was struck by a serious bout of the mumps and subsequently found to be unfit for war service. On 24 July 1918, at age 41, John McKenzie married Annie May Wrigley (known as May), 12 years his younger, at Wellington and they lived at 2 Rāwhiti Terrace, Kelburn. The couple had two sons, Don (born in 1921) and Roy (1922), and when the family moved to Rona Bay in 1926 the boys were both educated at Muritai School in Eastbourne. The McKenzies were a part of the Wellington social scene. Roy recalled being woken up one evening in September 1928 to meet Charles Kingsford Smith, who had just become the first airman to fly the Tasman Sea in the *Southern Cross*. The next year the boys took a flight with Kingsford Smith's navigator Captain Ulm. J R McKenzie liked to fly and had a love of cars and, in fact, speed.

The McKenzie family moved to a large homestead and land on Yaldhurst Road, Riccarton, Christchurch, in the late 1920s where John established Roydon Lodge Stud (named after his two sons). Importing bloodstock from America, J R McKenzie built a reputation as one of the country's leading breeders and trainers of pacers and trotters. McKenzie also drove at some trotting events. He continued to enjoy sport and the outdoors: riding, hunting and fishing, golf and, later in life, bowls.

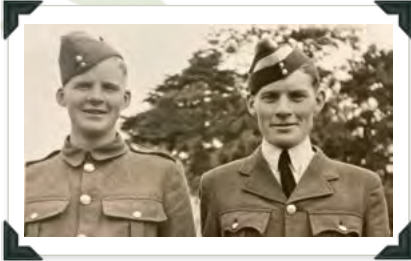
The children went to Yaldhurst school and then boarded at Cathedral Grammar School before boarding at Timaru Boys' High

John and May McKenzie
on their wedding day,
24 July 1918.

J R McKenzie Trust



School after their father had been so impressed during a visit to the school. Both sons excelled at sports. Don enlisted in the Royal New Zealand Air Force at the outbreak of the Second World War and was tragically lost at sea on a training mission near Lake Grassmere in 1942. Apart from the family's grief, for Roy it meant he now became the successor to take over his father's business and philanthropic interests. First, however, he was called up for the army, but later transferred to the Royal New Zealand Air Force and served in Bomber Command over Europe during 1944–45.



Roy and Don McKenzie, c. 1941.
Alexander Turnbull Library

Rotary and philanthropy

In 1923 'JR', as he was known by friends and in Rotary circles, was invited to join the Rotary Club of Wellington, just two years after its founding

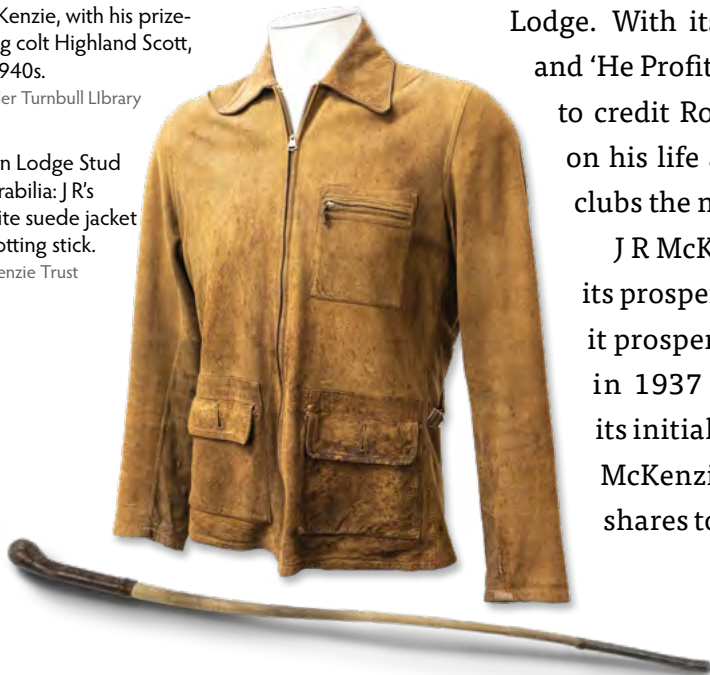


J R McKenzie, with his prize-winning colt Highland Scott, circa 1940s.

Alexander Turnbull Library

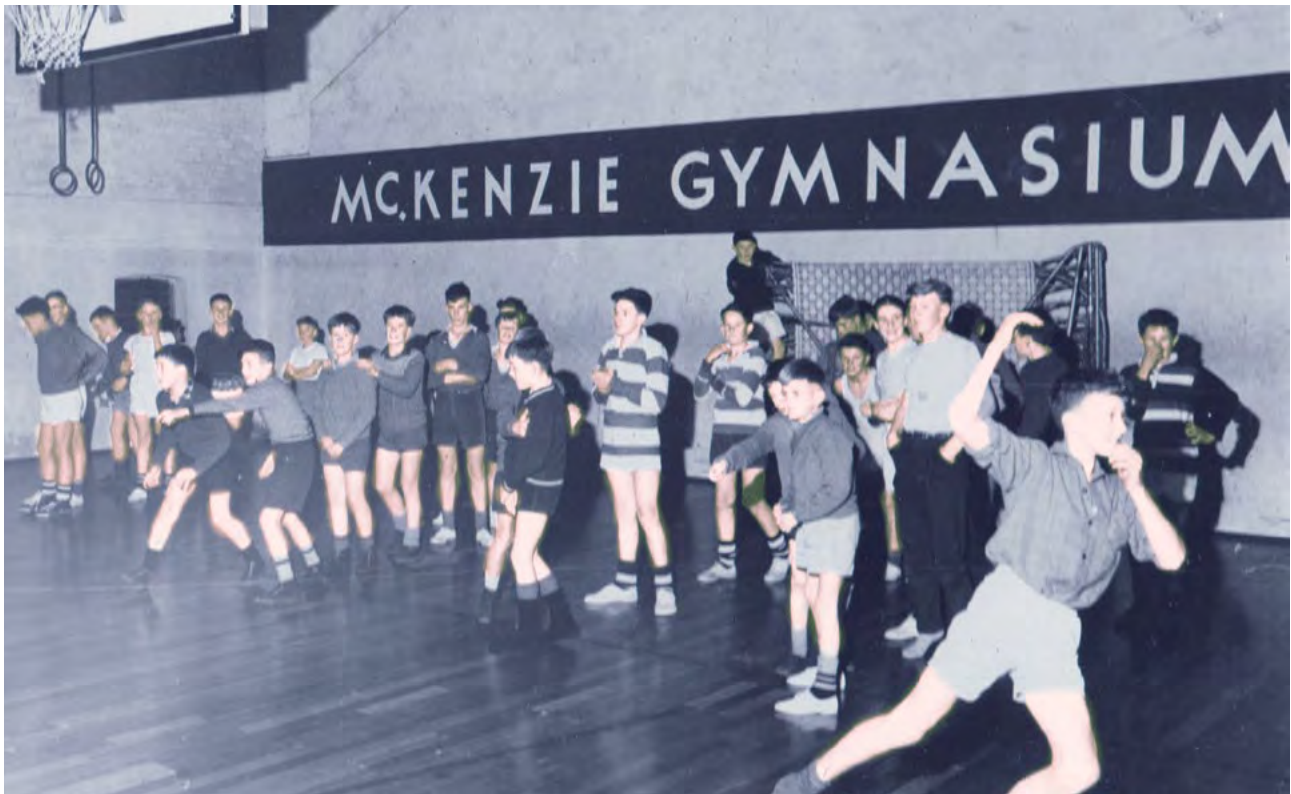
Roydon Lodge Stud memorabilia: J R's favourite suede jacket and trotting stick.

J R McKenzie Trust



as the first club in New Zealand.³ Even before joining, McKenzie had supported the club's first major project, on behalf of the Plunket Society, to fund the Karitane Hospital at Melrose in Wellington, which opened in 1927 and served young mothers and their babies, and trained Karitane nurses into the late 1970s. During the 1920s Rotary grew rapidly throughout New Zealand and when the family moved to Christchurch, he joined the club there and hosted fundraising events at Roydon Lodge. With its dual mottoes of 'Service Above Self' and 'He Profits Most Who Serves Best', McKenzie was to credit Rotary with having a profound influence on his life and philanthropy, and he made Rotary clubs the main agents of his philanthropy.

J R McKenzie believed that a firm should share its prosperity with those who had helped to make it prosperous. Known as the 'Chief' by his staff, in 1937 he established Rangatira Ltd, with its initial holding being a majority interest in the McKenzies department store chain, to enable its shares to be gifted to a series of charitable trusts



that would form the majority of the shareholders. The first, in 1938, was the establishment of the J R McKenzie Youth Education Fund with a gift of £10,000 (\$1 million in 2020 money), followed in 1940 by the J R McKenzie Trust, which was established with an initial capital base of £100,000 (\$10 million in 2020 money), making it one of the largest philanthropic trusts in the southern hemisphere. McKenzie also actively supported numerous other charities and voluntary organisations, such as the Crichton Cobbers' Club for youth in Christchurch,⁴ and had a particular concern for education and the needs of underprivileged children, and returned servicemen.

Final years

Sir John McKenzie was knighted in 1950 for his contribution to public and philanthropic services and was invested with the knighthood from the Governor-General Sir Bernard Freyberg VC at an investiture ceremony



In 1955, shortly before his death, Sir John McKenzie gifted £10,000 via his Rotary Club of Christchurch to the Crichton Cobbers' Club in order to purchase the old Ward brewery building at the corner of Chester Street East and Fitzgerald Avenue. The McKenzie Gymnasium, opened in 1958, was named in Sir John's memory.
CRICHTON COBBERS' CLUB,
Youth Alive Trust



Sir John McKenzie was invested with his knighthood by Governor-General Sir Bernard Freyberg in Christchurch on 22 November 1950.

Sir John and Lady McKenzie at home later that day.
J R McKenzie Trust

in Christchurch on 22 November 1950, where Walter Hadlee was also invested with an OBE for his captaincy of the New Zealand cricket team's successful tour of England in 1949.⁵ In 1954 his business suppliers provided Sir John McKenzie with a testimonial in the form of a portrait by the eminent artist Edward Halliday.

McKenzie's health was somewhat precarious for much of his later life, and he suffered from severe back pain, and serious ill health requiring hospitalisation on several occasions, but his indomitable spirit helped him to recover. During an overseas trip with his wife in 1955, he died as a result of cancer of the kidneys at St John and St Elizabeth Hospital in London on 26 August, aged 79 years, with son Roy at his bedside.⁶ Lady McKenzie died of cancer the following year at Christchurch, aged 66 years. The Riccarton homestead was donated to the Department of Education and operated as the McKenzie Residential School between 1971 and 2012. The McKenzie family links to the area are today remembered with Sir John McKenzie Drive.



A portrait of the man

In 1954, business associates and admirers decided to commission a portrait of Sir John McKenzie as a mark of their appreciation.

The organisers raised the substantial sum of £2000 to commission the eminent Scottish artist and famed portraitist of the Royal Family, Edward Halliday, whom Sir John knew and admired. Halliday already had links with New Zealand in that the Governor-General Lord Norrie had commissioned a very large portrait of the young Queen Elizabeth II to hang in the ballroom at Government House in Wellington. The McKenzie commission almost came unstuck by another commission by the Royal Household, but on learning that Halliday was to travel

Sir John McKenzie standing for artist Edward Halliday in his studio in Christchurch, November 1954.

J R McKenzie Trust

to New Zealand, Her Majesty graciously agreed to postpone her own sitting with the recollection of meeting Sir John earlier that year on the Royal Tour of New Zealand. It was just as well for within nine months Sir John would be dead.



Portrait of Sir John Robert Hugh McKenzie, 1954, by Edward Irvine Halliday, oil on canvas.
Alexander Turnbull Library

Halliday, accompanied by his daughter, flew to New Zealand and landed in Christchurch in early November 1954, where a studio had been arranged in the city. The arrival in the country of such a well-known artist had the art world in a flurry, but Halliday stated the portrait was his priority. He was keen, however, to secure further commissions, and Sir John himself obliged by commissioning the artist to paint a portrait of Sir Winston Churchill, who he considered the greatest statesman of the age and greatly admired for his strength of character and determination. This would be his last gift to the nation, with the hope it would be an inspiration to New Zealanders. Roy McKenzie, in 1958, would present the portrait to the House of Representatives for it to hang in Parliament.⁷

Halliday's large oil painting of Sir John McKenzie in his late years captures his character and hints at the many aspects of his life and loves. He is standing in the rural landscape of his property on the outskirts of Christchurch, with the Port Hills in the background. Sir John is holding his hat and wearing a tartan tie befitting his Scottish ancestry, but it is also worn under his favourite zipped suede jacket that instantly gives an air of informality and of a man comfortable in the simple pleasures of the outdoors. Reins hang over his left hand and in the background can be seen his beloved racehorses. The piercing eyes reveal his strength of character and determination, but his overall demeanour captures a man of humility and kindness.

The portrait was presented to Sir John at a testimonial dinner at the National Art Gallery in Wellington on 8 December 1954. Shortly after Sir John's death, Lady McKenzie donated the painting to the National Art Gallery.

A legacy

John McKenzie was a child of the Victorian age. His son Roy recalled his father as being strict and not wanting his sons to be spoiled, but he did acknowledge success through commitment and hard work. He was also an older father, and from a time when fathers did not show their feelings, but an insight into the affection he held for his sons is the repeated use of the portmanteau 'Roydon' for his private and public endeavours, including its use as the label for McKenzies's own line of menswear. J R McKenzie was also quick to provide credit to the support of Lady May McKenzie, who shared his philanthropy and sense of social justice.

J R McKenzie's drive and somewhat taciturn and forthright character, a man who did not suffer fools, could put his employees on edge, but staff greatly admired his ability and generosity. 'JR' admired men of action on both sides of the political spectrum: from British Conservative wartime Prime Minister Sir Winston Churchill, whom he viewed as the greatest statesman of the age, to New Zealand Labour politician Robert Semple, who like himself was Australian-born, knew what he wanted, and was forthright in his manner to achieve it. What was recognised by his own son and staff, politicians and Rotarians, even the Palace and definitely



The Lady McKenzie Garden for the Blind at the northern end of Fitzherbert Terrace, Thorndon, Wellington, was opened in 1970.
J R McKenzie Trust

This commissioned portrait of Sir Winston Churchill by eminent artist Edward Halliday was Sir John McKenzie's last gift to the nation before his death. Roy McKenzie presented the painting to the House of Representatives in 1958, in order that it would hang in Parliament as an inspiration to all New Zealanders. It was received by Prime Minister Walter Nash (centre) and Leader of the Opposition Keith Holyoake (left). J R McKenzie Trust

the thousands of ordinary New Zealanders who were recipients of his generosity, was his public service and philanthropy. His generosity was not simply grand gestures, but repeatedly small and unseen, such as the time he stopped on a country road to give a lift to a man pushing his own wheelchair. A week later the man received the delivery of a motorised wheelchair. This was J R McKenzie.

Sir John McKenzie built up one of New Zealand's most successful retailing organisations. In spite of his success in business, he believed that the true value of a life lay in service to others. In support of this belief, he became one of the country's most generous private benefactors of the 20th century. In his lifetime, McKenzie contributed £1 million (\$53 million in 2020 money) to New Zealand charities and a further £160,000 (\$8.5 million in 2020 money) was bequeathed on his death. His most enduring legacy was the J R McKenzie Trust, one that its founder's vision lives on through its strong philanthropic identity of 'a socially just and inclusive Aotearoa New Zealand', and it is to its story that we now turn.



McKENZIE'S



McKenzies department stores

McKenzies department stores brought a new style of retail experience to New Zealand and for much of the 20th century McKenzies was a household name for variety and value, and also for its value to society.

It was on a motorcycle holiday throughout New Zealand in 1909 that McKenzie could see the opportunity for his fancy goods stores, and he gradually transferred his business interests to New Zealand, including his sister and brother-in-law George Carter coming across in 1914. The first store was opened in 1910 in Dunedin, trading under the name 'J R McKenzie's', then Christchurch in 1911 and Wellington in 1912. Despite difficulties of trading during the war years, new branches were opened in Whanganui and Timaru in 1915; Palmerston North and Invercargill in 1916; and in 1917, a second Wellington store and the first purpose-built McKenzie's store at 116 Cuba Street (extant); and from 1928, with now 22 J R McKenzie's fancy goods stores throughout the country, the company's

McKenzies department store Tauranga, 1957.
J R McKenzie Trust



Giving for Good



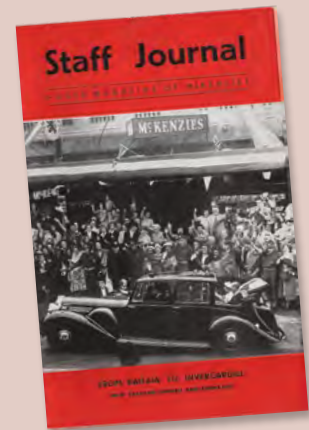
The first McKenzies variety department store opened in Cuba Street, Wellington, in 1929.
J R McKenzie Trust

first head office was accommodated here.⁸ The now 52-year-old J R McKenzie had built up a sizeable and successful chain and with the decision to relocate his family to Christchurch it looked like he might be slowing down, but a trip to America opened up a new vision for retail in New Zealand and eventually the means to make a social difference.

McKenzie travelled extensively abroad on stock-buying tours and on a visit to America in 1928 (not only to buy shop stock, but also breeding stock for his new Roydon Lodge Stud), he was taken by the 'five and dime' low-cost, high-volume variety department stores. Within a few years most of his fancy goods stores had been relocated and converted to this new variety department store model, now trading as 'McKenzies', selling clothing, household goods and a wide range of other items (McKenzies' home brand was known as 'Roydon' after his sons) displayed in a new way — large open bins. The introduction of this new type of retailing to New Zealand came exactly at the right moment with the onset



of the Great Depression between 1929 and 1935, and shoppers seeking value for money and an upbeat shopping experience during hardened times. The ability to place large bulk orders at a time when tariffs favoured British imports resulted in savings that McKenzies passed on to its customers.⁹ It was not only value for money that shoppers welcomed, but also the opportunity to easily view goods without the need for a shop assistant and the obligation to buy; and added to this was the use of colour, often large red sale signage, and sound, with music playing in-store and cash registers ringing, which provided a new sensory shopping experience. It soon became the largest nationwide retail organisation and the pattern for much of New Zealand retailing. On 9 November 1936 the private company was registered as a public company, McKenzies Department Stores Ltd (later McKenzies NZ Ltd), four years before Fletcher Brothers became Fletcher Construction Ltd. The company appointed an independent chair while J R McKenzie continued as its managing director. In 1937 Rangatira Ltd became



McKenzies also led the way with the first in-store coffee bars.
J R McKenzie Trust





the majority shareholder as part of the new structure in order to distribute McKenzies profits to McKenzie's philanthropic interests. There followed further expansion to 33 stores before the outbreak of the Second World War in 1939.

After the boom of the 1930s the war years provided booms of a very different nature and trading difficulties for McKenzies. Wartime import-licence restrictions and government confiscations, and shipping difficulties, hit the import business together with the loss of experienced managers and staff to serve in the war. The annual report at the height of the war in 1942 mentioned 165 staff in uniform, with the majority serving overseas, and J R McKenzie paid special tribute to his female staff for filling the breach.¹⁰ McKenzies Ltd supported the war effort with the purchase of £10,000 of war bonds, together with the £2500 from staff, and £50,000 from J R McKenzie personally for a total of £72,500 by 1943.¹¹ The 'Chief' knew only too well the personal cost for the families of staff overseas with the death of his eldest son on RNZAF military exercises at home and his only other son training to fight in the skies over Europe.

Queen Street staff, 1937.
J R McKenzie Trust

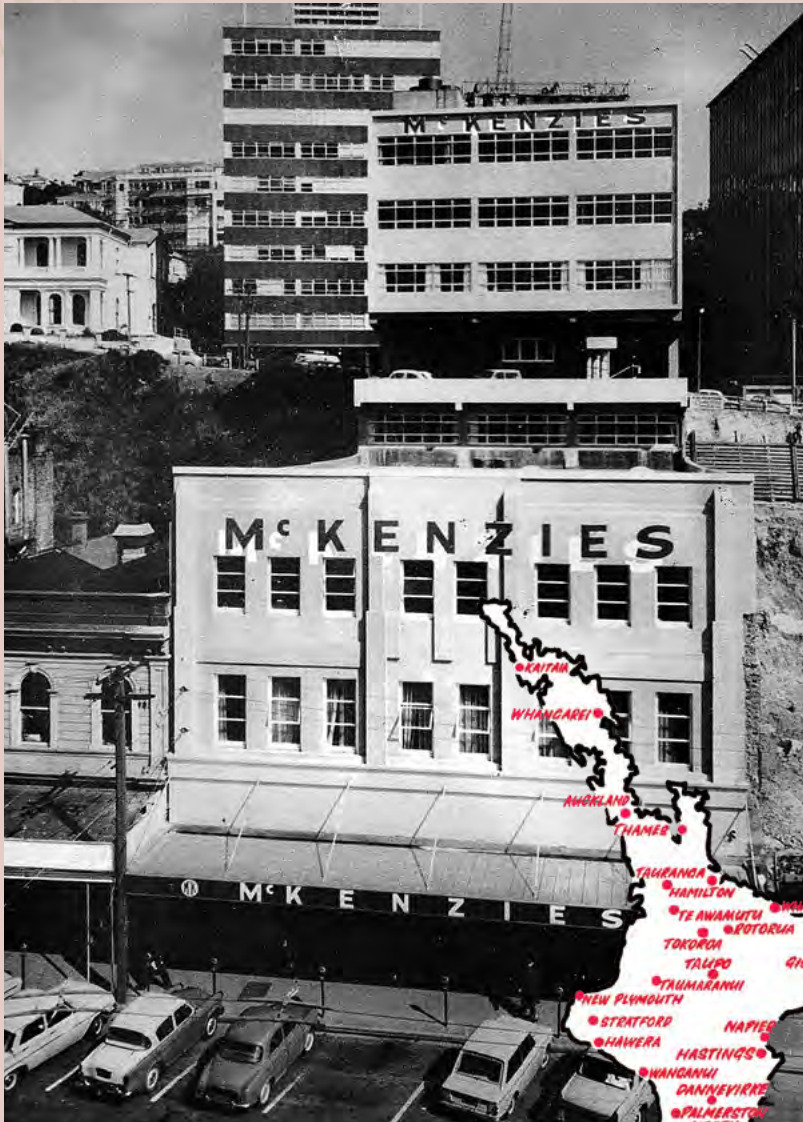


After the war and valuable work experience in Marks and Spencer department stores in the United Kingdom in 1948, Roy McKenzie started at McKenzies Ltd, opening the Kaitaia branch in 1950, and was then appointed to the board in 1952. Sir Roy would later recall that he was a 'mellowing' influence on the 'old man', now in his 70s, before becoming an executive director after his death in 1955. With the post-war suburban building boom and the uptake of motor vehicles, new McKenzies department stores opened in suburban shopping centres, such as at New Lynn and Ōtara. McKenzies also continued to lead the way with the first in-store coffee bars and the introduction of escalators for the convenience of their customers. The post-war baby-boom generation fondly recall McKenzies as the unstuffy family store where hard-earned pocket money went further on toys, rides and the ever-popular pick 'n' mix lollies.

The competition with the Australian-owned Woolworths that had started in 1929, indeed within weeks of, and next door to, the first McKenzies variety department store opening in Cuba Street, was always 'very, very tough', recalled



The Glen Innes McKenzies department store grand opening, 1961.
J R McKenzie Trust



Lambton Quay and The Terrace, c. 1960s.

Roy McKenzie, *Footprints*

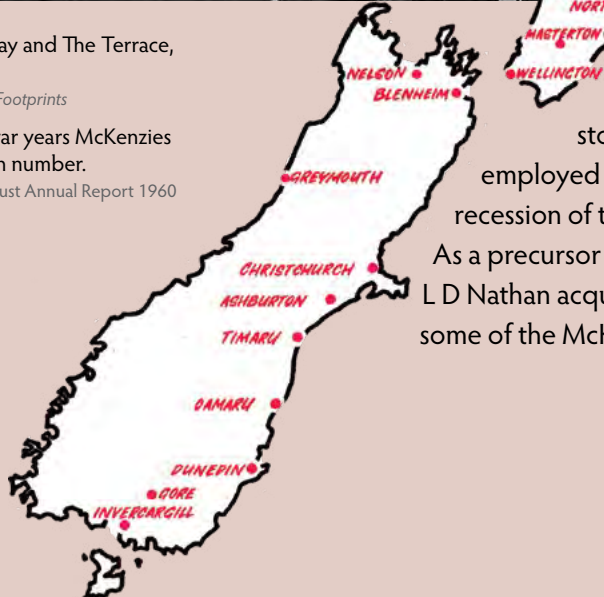
In the post-war years McKenzies stores grew in number.

J R McKenzie Trust Annual Report 1960

Sir Roy. Both stores continued to be located in close proximity so customers could compare goods and with the hope of attracting the sale. Both chains were known as family-friendly businesses, but McKenzies was more a family business, which included its loyal staff assisted from 1954 by a strong staff superannuation fund, the McKenzies Staff Provident Association, with shares valued at £100,000 (\$5.65 million in 2020 money). At the 50th anniversary celebrations in 1960, 30 of the senior staff had been with the firm for more than 20 years. McKenzies was also not shy to emphasise that it was 'New Zealand Owned and Operated' and good for the community, that is, the profits were returned to the community through the J R McKenzie

Trust. Dame Diana Crossan remembers on childhood holidays in Dunedin 'a trip to Town' with her grandmother always included a visit to McKenzies because, as she was reminded, shopping there helped those in need.¹²

At its height by the 1970s the McKenzies department chain had over 70 stores throughout New Zealand. McKenzies employed more than 1800 people before the economic recession of the late 1970s and tough trading conditions. As a precursor to the decade of acquisitions in the 1980s, L D Nathan acquired the company in 1980 and merged some of the McKenzies stores with its earlier acquisition





of Woolworths. The familiar red 'McK' logo may have disappeared, but the memories were kept alive at regular staff reunions, and the family name lives on through its well-known charitable activities.

McKenzies introduced New Zealanders to a new way of shopping, and for most of the 20th century was also the strongest example of a New Zealand company championing social responsibility, decades before this became vogue and the rise of the likes of The Warehouse and Tindall Foundation.

The McKenzies store at the Glenfield Shopping Mall, Auckland, in 1976. (Inset: the store opened in 1971.)

Auckland Libraries Heritage Collections and J R McKenzie Trust



**“I have established a Trust
which I hope will prove of
benefit to the community, not
only at present, but in the years
to come.”**





Chapter One

The Big Trust

1940-1960

“I have established a Trust which I hope will prove of benefit to the community, not only at present, but in the years to come.”

J R McKenzie, 6 March 1940¹³

By 1940 John Robert McKenzie had achieved phenomenal business success during his 30 years in New Zealand and was running the largest retail organisation in the country. He had come from humble beginnings and now it was time to give back, and big time. His beloved Rotary and its ethos of ‘Service Above Self’ was the inspiration, and Rotary would be the agents of his giving. He had already given two years earlier when he announced, at the Christchurch Rotary conference in 1938, a gift of £10,000 to establish the J R McKenzie Youth Education Fund, run by Rotarians to help boys in unfortunate circumstances to finish their education — remember that the young John had to quit schooling early because of the financial situation at home. Now, in 1940, the time was right for John Robert McKenzie to establish a legacy that would deliver a positive social impact for generations.

New Zealand in 1940

The start of 1940 was a strange mix of circumspection just months after the outbreak of the Second World War (what would later become known as the ‘phoney war’) and celebration with the 1940 New Zealand Centennial. On Friday, 5 January 1940, for example, the First Echelon of the 2nd New Zealand Expeditionary Force departed Wellington, and while the New Zealand Centennial Games in Auckland due to open the next day were cancelled, a Thanksgiving Service was held on the Sunday and much of the centennial celebrations continued as planned during the preceding four years.

The centrepiece was the Centennial Exhibition in Wellington, touted as the greatest world exhibition ever to be held in the southern hemisphere, but unfortunately the world did not come due to the war. New Zealanders,



Previous page:

J R McKenzie (right) hands over the first cheque of £5,000 to the J R McKenzie Trust Chairman John Barton. Looking on are founding executors Sir Alexander Roberts (centre) and Alf Duncan (left), both members of the Rotary Club of Wellington, c. 1940.

Alexander Turnbull Library

J R McKenzie, c. 1940.

J R McKenzie Trust

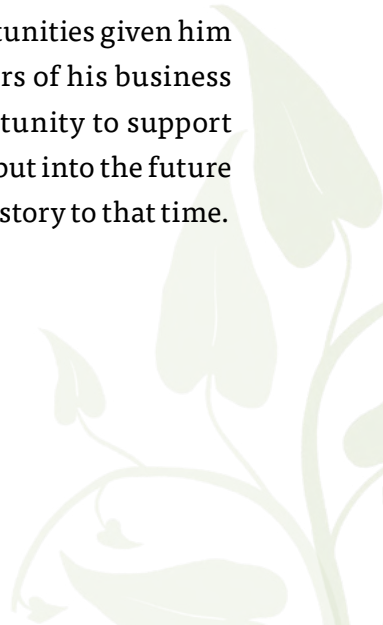


New Zealand
Centennial Exhibition
poster.
Alexander Turnbull Library

however, did. Over 2.5 million visitors came through the 22-hectare site at Rongotai during the six months it was opened. Most flocked to ‘Playland’, with its Cyclone roller coaster and an array of other rides and entertainment that would not have looked out of place at Disney World three decades later. Next door, the striking art deco buildings featured a soaring central tower and masses of electric lighting and neon, with displays celebrating ‘the progress and ambition of the young nation’. There was pride in the transformation of the land from bush to farmland, the growth of cities, and the amazing progress brought by electricity and modern transport. The large Government Court celebrated the welfare state, just in its infancy, women’s rights, race relations and ‘the birth of the nation’ — there was little mention of the New Zealand Wars or the current World War lest the celebratory spirit be dampened.

The major purpose of the anniversary was to strengthen the national spirit, and even more to encourage a revival of the ‘pioneering spirit’. It was very much a Pākehā-centred vision and while Māori took part they also protested the loss of land and their rangatiratanga; even the opening of Te Whare Rūnanga at Waitangi was misunderstood as symbolising the apparent strength of New Zealand’s race relations when in fact Māori saw it as a reminder to Pākehā that the agreement they had entered into had not been honoured. For most Pākehā, however, they welcomed the distraction from the looming real war and within one week of the closure of the Centennial Exhibition in early May 1940, Nazi Germany had invaded France and the Lowlands.

John Robert McKenzie recognised the New Zealand Centennial as an appropriate moment in time to acknowledge the opportunities given him by his adopted country, the support of New Zealanders of his business initiatives over the last three decades, and the opportunity to support New Zealand not only during its time of greatest need, but into the future with the largest philanthropic gesture in the nation’s history to that time.

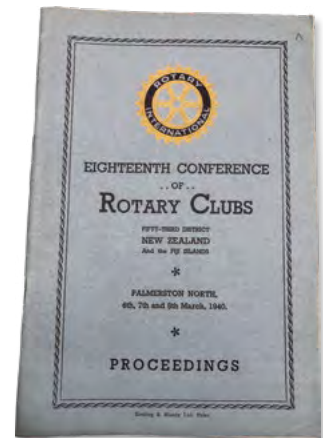


'Munificent gift'

On the opening morning of the Rotary New Zealand district conference held at Massey College, Palmerston North on 6 March 1940, J R McKenzie was invited to address delegates. In recognition of the public's support of his business interests and to mark New Zealand's Centennial and the inspiration of Rotary personally, he announced that with the approval of the government he had established the J R McKenzie Trust for the needs of soldiers, sailors, airmen and mercantile mariners; the Royal New Zealand Society for the Protection of Women and Children (Plunket); the health and well-being of children; and to assist welfare, social and charitable purposes in New Zealand. 'I have established a Trust which I hope will prove of benefit to the community, not only at present, but in the years



to come', so 'J R' explained to his fellow Rotarians, and as to its purposes, 'At this moment this little country has no greater assets than its soldiers and its children, and its future is in their hands. Any benefit we can give them must pay substantial dividends to the country, and I am sure will be reflected in our National progress.' The gift of £100,000 (\$10 million in 2020 money) in shares in Rangatira Ltd to establish the Trust would guarantee £5000 per annum for grants — making it one of the largest philanthropic trusts not only in New Zealand but in the southern hemisphere. Indeed, this announcement and the sheer amount of the gift stunned delegates into silence before they spontaneously broke into prolonged applause followed by everyone standing to sing 'For He's a Jolly Good Fellow', and then repeated with 'She's' on the announcement that May McKenzie



Cover of the Rotary 1940 conference proceedings. ALEXANDER TURNBULL LIBRARY

Evening Post, 6 March 1940.
J R McKenzie Trust

was present and also associated with the establishment of the Trust.¹⁴ The representative of Rotary International and the former Australian Solicitor-General Sir Robert Garran praised the gift as an inspiration ‘to Rotarians all over the world’.¹⁵ That evening the *Manawatu Standard* and the *Evening Post* ran the story under the headline ‘MUNIFICENT GIFT’, and similar headlines and the amount of £100,000 were reported around the country in the following days.¹⁶ The historic significance of this gift is captured in the volume of neatly pasted press cuttings held at the J R McKenzie Trust office.

The Trust in action

The personal trustees of the J R McKenzie Trust that had been established on 12 February 1940 were Sir Alexander Roberts, a Wellington businessman and the inaugural president of Rotary Club of Wellington in 1921, and fellow Wellington Rotarian and general manager of McKenzies Ltd, Alfred (Alf) Duncan. The next step was to establish a full Trust board. Rotary had been the inspiration and Rotary clubs would be the main agents for the allocation of funds. The Rotary trustees included the New Zealand district governor of Rotary David Ewen (of Sargood, Ewen and Co. and a former director of the Reserve Bank) and representatives selected from the clubs of Auckland, Wellington, Christchurch and Dunedin (see appendix Trustees & staff 1940–2021). Unlike the J R McKenzie Youth Education Fund that was fully run by Rotarians, J R McKenzie wanted high-level community involvement, with three trustees to be nominated by the New Zealand Branch of the British Medical Association, the chief justice, and the third and chair to be nominated by the governor-general. The inaugural chair was talented lawyer and former judge John Barton;¹⁷ lawyer Claude Weston was the nominee of the chief justice, and finally Colonel Fred Bowerbank, director-general of Medical Services for the Army and Air Force, was the medical representative. The first Trust meeting was held on 4 June 1940 to discuss policy and establish processes.¹⁸

From the outset the Trust operated a lean administrative structure with J R McKenzie’s personal lawyer, Ernest Jones, acting as administrator

and working closely with the chair to receive and collate the applications, and acknowledge the results of the annual distribution meeting. The first meeting in September 1940 distributed £600, representing the income from investments which had accrued from the date of the Trust on 12 February to 31 March 1940, equally to the War Relief Associations (£50 each in the four main centres); £200 to the New Zealand Returned Soldiers' Association (RSA) for the assistance of wounded and disabled returned servicemen; and £200 to Plunket, in accordance with the provisions of the Deed of Trust.¹⁹

At a subsequent meeting in October 1940 the Trust board acknowledged the need to make special provision 'for the benefit of the Māori race' and after consulting with the Minister of Native Affairs, Hon Frank Langstone, took up his suggestion to select two Māori women to train as Karitane nurses. This was the first effort by the Trust to support better Māori social outcomes.²⁰

At the first annual distribution of the promised £5000 there was a pattern established whereby the nationwide and respected organisations received the lions share: £1450 to the RSA, £1200 to Plunket and £1000 to the Federation of Health Camps (an area of Rotary interest since the 1920s). The remainder of the distribution also established the pattern of many smaller grants, from £10 to £100, to an array of societies interested in the welfare of underprivileged children and, in the unfortunate language of the time, 'backward' or 'subnormal' children; support for the elderly and those in mental hospitals; and the City Missions, the Salvation Army and various church and welfare organisations concerned with those in need in the community. The grants had to be utilised in the year. The distribution model was in the long tradition of charity handouts, but also the Rotary ethos of providing a hand-up. In New Zealand, however, such large private philanthropy was rare and its assistance to voluntary organisations during the infancy of the welfare state was vital and appreciated, as evidenced by both the number and the variety of the initial recipients of grants from the J R McKenzie Trust.²¹

The distribution model was in the long tradition of charity handouts, but also the Rotary ethos of providing a hand-up.

Rangatira Ltd

Rangatira Ltd has a proud history of growing many iconic New Zealand companies while supporting its charitable shareholders, including its majority shareholder the J R McKenzie Trust, to improve the wellbeing of New Zealanders. The company embodies the legacy of the McKenzie family's pioneering and philanthropic vision and embraces their guardianship.

Rangatira Ltd was founded on 14 December 1937 by J R McKenzie with its initial holding being a majority interest in the McKenzies department store chain. Although he was never a director himself, J R McKenzie set up Rangatira Ltd to gift its shares to a series of charitable trusts, including the J R McKenzie Youth Education Fund in 1938, and two years later, the J R McKenzie Trust as principal shareholder with 51 per cent. In this way McKenzie divided the creation and management of capital from the allocation of charitable funds — a successful model that continues to this day.³⁶

His son, Roy McKenzie, was a director from 1944 to 1993, and as chair from 1968 to 1985 built much of Rangatira Ltd to what it is today. Rangatira's first 40 years was characterised by steady growth, but from 1977 the rate of growth accelerated with shareholders' funds increasing from \$12 million in 1977 to \$80 million in 1997, and annual dividends up from \$400,000 to \$3.5 million.³⁷ Roy McKenzie led the sale of McKenzies department store chain in 1980 at an opportune time, and at a good price for shareholders and McKenzie charitable interests. He also expanded Rangatira's range of investments. During his 49 years as a director, Roy McKenzie continuously emphasised the needs of its charitable shareholders and gifted further shares to various charitable organisations. Today, Rangatira Ltd's shareholders include Birthright, Cystic Fibrosis NZ, the National Foundation for the Deaf and Hard of Hearing, Outward Bound, Ngā Manu Trust,

Te Omanga Hospice, Women's Refuge and the YWCA.³⁸ As chair of both the boards of Rangatira Ltd and the J R McKenzie Trust from the early 1970s to the mid 1980s, Roy McKenzie was well placed to monitor the money making and giving sides of the McKenzie legacy.

Sir John McKenzie had envisaged Rangatira Ltd supporting new companies and economic development in New Zealand, and this was significantly increased during Sir Roy's time.³⁹ Rangatira Ltd became a key investor during the formative or expansive stages of many iconic New Zealand companies, including ANZCO Foods, DB Breweries, Golden Bay

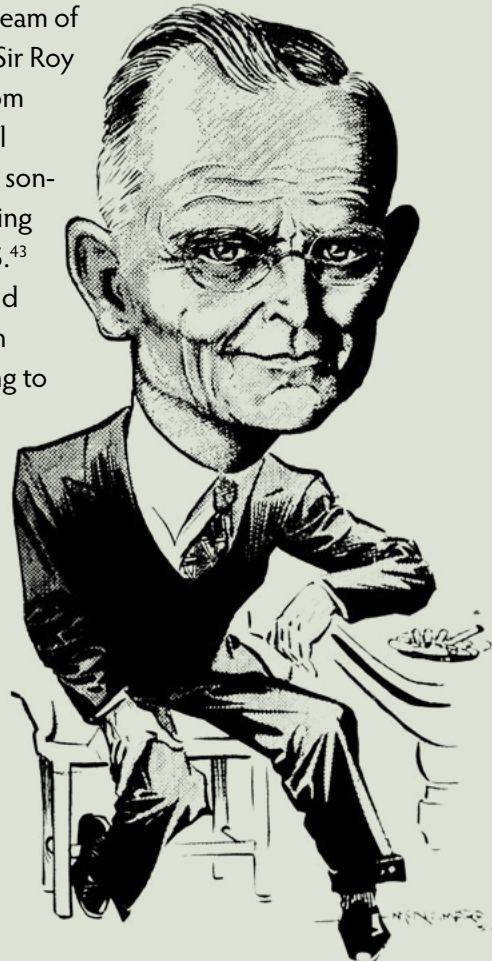
Rangatira is a remarkable foundation story of corporate social responsibility in Aotearoa New Zealand.

Cement, Feltex, Hellers, James Cook Hotel, Montana, Mt Cook Airlines, Polynesian Spa, Rainbow's End and Wattie's. Today Rangatira's investment criterion is to be a cornerstone and co-investor with current shareholders and management (to ensure alignment and representation) in companies that are mid-market (with an enterprise value of \$120 million), profitable and in a growth stage. The current portfolio is predominantly private New Zealand businesses, investments in publicly listed equities, property, venture capital and cash.⁴⁰

In 2021, Rangatira posted a strong result with a net profit after tax of \$9.9 million and increased dividends to its shareholders on the back of increased earnings. It is the nature of markets to fluctuate and to impact on the dividends, but as a fund with a permanent capital base of \$263 million, Rangatira is able to hold investments long term through market cycles in partnership with its co-investors.⁴¹ Rangatira has a history of talented governance; its current chair, David Pilkington, was named Chairperson of the Year in the Deloitte Top 200 Business Awards in 2019, and the board is also well supported by chief executive Mark Dossor and a senior management team of three.⁴² Continuing the tradition of family involvement, Sir Roy McKenzie's son, Peter McKenzie, served as a director from 1992 to 2011 (he had earlier gifted some of his personal shares in Rangatira Ltd to form Ngā Manu Trust), and his son-in-law, Keith Gibson, has been a director since 2011 having previously served as a director between 1982 and 2005.⁴³

The almost 85-year history of Rangatira Ltd is a proud one of growing some of New Zealand's most well-known companies, employing New Zealanders, and contributing to the economic growth of the nation, while supporting its charitable shareholders, including the J R McKenzie Trust, to build a better society. Rangatira is a remarkable foundation story of corporate social responsibility in Aotearoa New Zealand.

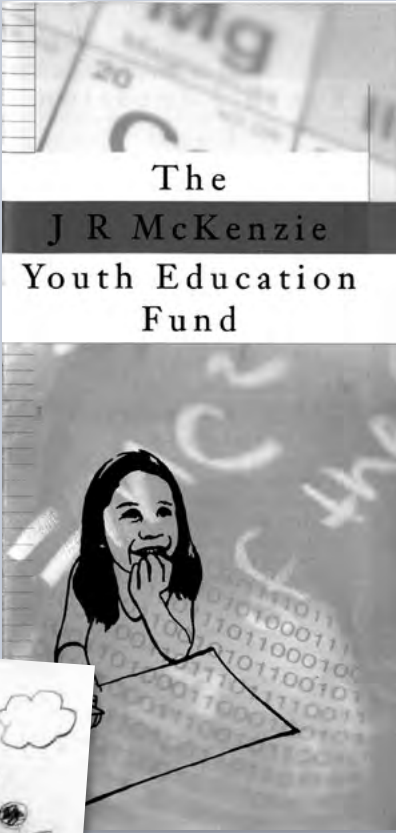
J R McKenzie by [John Joseph] McNamara, 1938. Published in the *NZ Observer*, 13 March 1940.
J R McKenzie Trust



J R McKenzie Youth Education Fund

The J R McKenzie Trust came to be known as the 'Big Trust' as the J R McKenzie Youth Education Fund had been established two years earlier, in 1938, to initially assist boys to finish their education.

At the Rotary New Zealand district conference held in Christchurch in 1938, Rotarian J R McKenzie, who had left school at 13 years old due to financial difficulties at home, announced the gift of £10,000 (\$1.06 million in 2020 money) for 'the betterment and education of boys' (and remembering the male-dominant times) as 'The future of this country is in the hands of our boys and any betterment of their conditions and education must be reflected in our National progress.' What would become the J R McKenzie Youth Education Fund would enable boys in Christchurch and Wellington to finish their education, with the fund fully administered by the Rotary clubs in both cities. In thanking 'JR', the New Zealand district governor Fred Hall-Jones responded, 'I envy you having the means to make this magnificent gift, and also do I envy you the thought which has inspired the gift.'⁴⁴

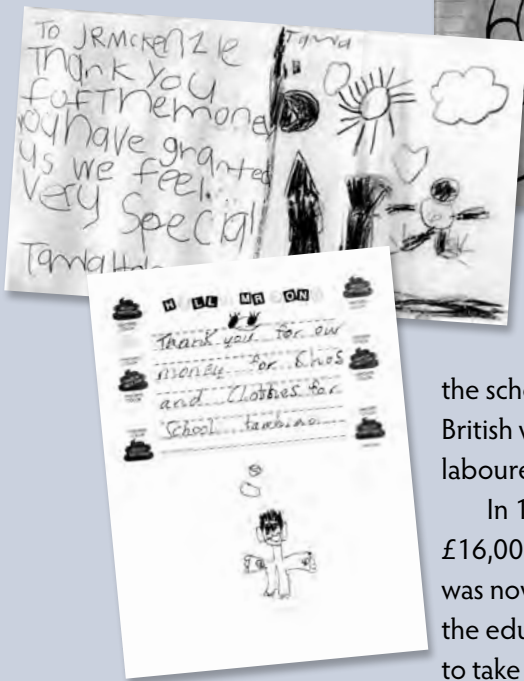


By 1943–44, the Wellington trustees were providing grants worth between £10 and £60 (\$1100 and \$6400 in 2020 money) to mainly male orphans and children of widows or a deserted parent, including towards the school fees of a third-year Māori student at Te Aute College, a uniform for a British war evacuee at Hutt High School, work clothes for apprentices and farm labourers, and a number of university bursaries.⁴⁵

In 1954, the J R McKenzie Youth Education Fund received a further gift of £16,000 (\$900,000 in 2020 money) worth of shares in Rangatira Ltd. The Fund was now extended to Rotary Clubs in Auckland and Dunedin and to apply to the education of girls, such as the Māori woman from Auckland who was assisted to take a physiotherapy course in Dunedin.⁴⁶ By 1990 the Fund had distributed

Grateful thanks expressed by young children supported by the Youth Education Fund.

J R McKenzie Trust



in excess of \$1.5 million in grants to over 10,000 young people to help meet education costs, especially in cases of death, illness or family break-up.⁴⁷

Today, the J R McKenzie Youth Education Fund is administered on behalf of the six Rotary districts by the clubs of North Harbour, Auckland, Hamilton, Wellington, Christchurch and Dunedin. These clubs have a separate committee which receives and considers all applications from individuals (through Rotarians), other Rotary clubs, community organisations, school principals, ministers and social workers, and helps where death, sickness, family break-ups or economic hardship cause difficulty for young people and their caregivers to meet the costs of their education.⁴⁸ In the over 80 years of the Fund tens of thousands of students have been supported in their education and start in life. Other than the McKenzie family, the Cottrells are another family synonymous with the J R McKenzie Youth Education Fund. Ian Cottrell was the secretary to the board for almost the first forty years and his son, Richard Cottrell, for the next forty.

The J R McKenzie Youth Education Fund and J R McKenzie Trust may sound similar, but 'are separate entirely', as Roy McKenzie succinctly put it, 'one deals with individuals only [and the other] with charitable organisations'.⁴⁹



In 2015 the JR McKenzie Youth Education Fund sponsored Fredrick Tupou (left), TyAaron Leniu (St Paul's College) and Jiavra Cohen (Auckland Girls' Grammar) on an Outward Bound course (pictured with Stewart Germann). The students subsequently spoke at a Rotary evening, describing the challenges, development of their personal strengths, re-evaluation of what is important, and learning about the value of working in a group as well as the importance of leadership skills.

St Paul's College and Auckland Girls' Grammar; Auckland Rotary Club.



The Fund assisted a Christchurch Rotary branch in 2021 to purchase school uniforms for 140 children at Ngutuawa (Bamford) School, Christchurch. Every child received a full uniform, so none are isolated by parents being unable to afford them. It also gives children a sense of belonging and pride in their school. The uniforms will be returned to the school when a student leaves so it can be passed on to new students.

Ngutuawa (Bamford) School, Christchurch; Christchurch Sunrise Rotary.

The war years

The war years and import restrictions made for difficult trading conditions for an import business, but still McKenzies Ltd, its staff and J R McKenzie personally supported the war effort via the purchase of Liberty war bonds to a combined value of £72,500 in 1942 (\$6.5 million in 2020 money). Meanwhile, the J R McKenzie Trust was supporting the RSA with the rehabilitation of disabled returned servicemen, and future generations through Plunket and a growing number of other organisations. The total annual distributions of £5000 'became a lifeline for many community groups struggling to stay afloat'.²² Nonetheless, Rotary clubs were encouraged to publicise the grants as the Trust board communicated their expectation to see more applications.

The Royal New Zealand Air Force band playing at Liberty Corner, intersection of Lambton Quay, Featherston Street and Hunter Street, Wellington, on 19 May 1942 with the aim to sell Liberty war bonds.

Alexander Turnbull Library



A breakdown of the distribution of £4800 during 1942–43, what would be the midpoint of the war and the toughest year for the country, reveal the major grants went to the RSA (£1400); Plunket (£300), including continued support to train Māori Karitane and Plunket nurses; and the Federation of Health Camps (£500). The next level of distributions went to individual institutions and organisations, such as the Auckland Institute for the Care of Backward Children (£150) and Occupational Centres for Subnormal Children in Christchurch (£115) and Dunedin (£125), the Wellington After Care Society (£35), Cholmondeley Children's Home in Christchurch (£150), the People's Church in Sydenham for its work among children and youth (£40), the Boy Scouts Association (£125) and the Girl Guides' Association (£50). The remaining £960 was distributed in small amounts to an array of organisations across the country.²³

After the war

For 130,000 returned servicemen the overwhelming priority was peace, prosperity and probably a pint down at the pub before six o'clock. Marriage, family and a home on a quarter-acre section now became an obtainable dream on the back of a national sheep flock delivering sustained economic growth and one of the highest standards of living in the world. Rural New Zealand grew the economy, but it was the bright lights of the city that drew the population.

Māori led the way in the great urban migration. Before the war, 75 per cent of Māori lived in the country, but two decades later 60 per cent lived in cities.²⁴ The J R McKenzie Trust would financially support the conversion of a large cargo shed at Freemans Bay in Auckland into the first Māori Community Centre. It was to hold hui and tangi long before the rise of urban marae, but it is perhaps best remembered as the social venue where many top Māori singers and showbands got their start. It was the start of the geographical barrier between the worlds of Māori and Pākehā being broken, and was captured on screen in the 1952 film *Broken Barrier* about a romance between a Pākehā male journalist and a Māori nurse.²⁵



McKenzie family service in the Second World War

J R McKenzie was no stranger to war service and its impact as a result of his service and wounding during the South African War. It was only his health that prevented him from serving in the First World War. Twenty years later during the Second World War he supported the war effort financially and both sons served, with tragic and life-changing consequences.

Don McKenzie joined the Royal New Zealand Air Force in the winter of 1941 and trained as a pilot, first in a Tiger Moth at Harewood aerodrome then on Harvard aircraft, graduating with his wings from Woodbourne aerodrome, near Blenheim. His love of flying and an aggressive self-confidence were the makings of an excellent fighter pilot, but it was not to be. While awaiting an overseas posting, Don, and co-pilot Jack de Villiers, in a two-seater Harvard and

Roy McKenzie (left) with his Lancaster Bomber crew, 103 Squadron, in 1945: Wyn Everitt, Shem Dowd, Jock Todd, Alan Lambie, Stan Bagley and Eric Walker.

J R McKenzie Trust

carrying out bombing practice, crashed into the sea near Lake Grassmere. J R McKenzie flew to Blenheim to take part in various private searches, but to no avail. The Second World War was brought home to the McKenzie family with the devastating loss of the elder son and natural inheritor of the business and philanthropy interests of J R McKenzie. The memory of Don McKenzie lives on in the Don McKenzie University Scholarship at Timaru Boys' High School, providing three years' assistance for students going to university, established by J R McKenzie, and funded from a gift of wartime Liberty bonds.⁵⁰

Roy McKenzie was originally called up for the Army Service Corps, but in 1943 like his brother, and much to his mother's natural concerns, transferred to the Royal New Zealand Air Force. He initially trained in New Zealand to be a pilot, but failed the eye test and so trained as a bomb aimer at Leighton in Alberta, Canada, and topped this course and the navigational course at Edmonton as part of the British Empire Air Training scheme.⁵¹ At the Passing Out Wings Graduation held at the plush McDonald Hotel, Roy came in for 'friendly fire' when it was announced that the keen pianist would play the 'Warsaw Concerto' on the grand piano on stage. After further training in Wales and England, Roy was finally posted to 103 Squadron in April 1944 and joined a Lancaster Bomber crew at the end of Bomber Command's campaign over Europe during 1944, including a near downing due to ice on the wings and a diversionary flight over Norway on the eve of the D-Day invasion at Normandy on 6 June 1944. It is probably just as well, as surviving three missions was a good return on the investment in training according to the head of Bomber Command Air Vice Marshall Arthur Harris, and indeed, one in three New Zealanders in Bomber Command did not survive the war, making it the greatest loss of any New Zealand service unit during the Second World War.⁵² After Victory in Europe in May 1945 there were sightseeing flights over Europe to ascertain the damage and flights to repatriate prisoners of war from Italy. Roy was home by Christmas 1945. The bonds of comradeship lasted for the rest of his life. Roy McKenzie attended reunions, and when one of his Lancaster aircrew, Scotsman Jock Todd, migrated with his family to New Zealand, he helped him purchase the Point Arthur Hotel near Queenstown as a silent partner, and later helped his widow open Glen Roydon Lodge in Glenorchy.⁵³

The family war experience of J R McKenzie and sons, and the death of Don, left a mark on the McKenzie family, like so many New Zealand families, but also a strong sense of empathy for the rehabilitation of returned servicemen, which found practical outlet as one of the founding objects of the J R McKenzie Trust.



Don McKenzie.
Roy McKenzie's uniform.
J R McKenzie Trust

New Zealanders were certainly meeting up and procreating: there were more than 47,000 babies in 1946, 56,351 in 1956, and an unsurpassed high of 65,390, or an average 4.3 births to each woman, in 1961. To house everyone, including the 225,000 mainly British migrants who arrived in the two decades after the war, Fletcher Brothers built state houses faster and further out into the new suburbs.²⁶ McKenzies department stores soon followed. Suburbia reinforced separate gender spheres, with the ever-popular women's magazines providing hints on how to make the perfect home, while 'a man's country' was down at the pub and the club.²⁷

It was no different for the next generation of the McKenzie family — apart from climbing the Matterhorn in 1948 and captaining the New Zealand ski team at the 1952 Oslo Winter Olympics — like other returned servicemen, Roy McKenzie settled down to married life. He and Shirley Howard wed on New Year's Day 1949, eventually settling in Wellington, and between work (on the boards of one of New Zealand's largest companies and its largest philanthropic trust) and time down at the Rotary club, started a family: Peter (born 1952), John (1954) and Robyn (1955).

Suburbia, cherished for its calm — and for the McKenzies experienced at Lowry Bay in Lower Hutt — would later be criticised as boring and lifeless

Home by Christmas.
Roy (standing left of centre)
returns to Lyttleton aboard
HMS Mooltan on
Christmas Eve 1945.
Roy McKenzie, *Footprints*



by the baby-boom generation as they grew into the first 'teenagers' in history. It was after a teenage sex scandal in Lower Hutt in 1954 that the government appointed lawyer Oswald Mazengarb to chair a Special Committee on Moral Delinquency in Children and Adolescents, and his report, sent to every New Zealand home, blamed the perceived promiscuity of the nation's youth on the influence of working mothers, a decline in the quality of family life in general, and the influence of American pop culture.²⁸ It revealed generational tensions by the mid-1950s, but is also evidence that the period was not all golden weather as is often assumed and that indeed life was no picnic for many families and significant parts of society.



Roy and Shirley's wedding day in Bournemouth, England, on New Year's Day 1949. Alexander Turnbull Library

McKenzies New Brighton 1958 had self-service counters. J R McKenzie Trust



Rehabilitating disabled servicemen

Servicemen returning from the Second World War were keen to put the war behind them. Throughout the nation, they were marrying and demanding their house and section in the suburbs on which to raise their families. It was not so easy, as New Zealand war veteran and writer Dan Davin relayed in his novel: "How long will the War last?" she asked suddenly. "For the rest of our lives," he said.⁵⁴ This was especially so for disabled and wounded servicemen. The sheer scale of the problem is evidenced by the fact that during 1945–46 the War Pensions Board reviewed 91,000 cases, 26,000 of which were new applications.⁵⁵

In addition to its advocacy to ensure returned servicemen and women received the best rehabilitation and war pension schemes from the state, the RSA was providing welfare assistance to the value of £50,000 (\$3.1 million in 2020 money) by 1952, and while some of this was covered by the annual Poppy Appeal, the need during the immediate post-war period was immense. As the pre-eminent veterans' organisation in the country, the RSA was a beneficiary of the J R McKenzie Trust, and its grants were to be expended for the benefit of all ex-servicemen who had suffered temporary or permanent disability through

Disabled Servicemen's Bowling Club in Lloyd Street, Wellington, c. 1948.

Archives New Zealand



wounds or sickness, or whose advancement in life or earning a livelihood had been prejudiced as a result of war service. By the end of 1944, and after five years, the RSA had received a total of £4350 (\$385,000 in 2020 money) in grants.⁵⁶ Then there was the personal generosity of J R McKenzie, who was himself a member of Christchurch RSA. In England in 1948 he purchased a small car called the Larmar, designed especially for the use of amputees, and presented the car to a Christchurch veteran who had lost both legs in the First World War.⁵⁷

The J R McKenzie Trust grants also allowed the RSA to initiate some community developments such as the establishment of disabled servicemen's bowling greens in each of the four main centres with grants of £250 each in 1944. John McKenzie, both a war veteran and a keen bowler, looked upon bowling greens with considerable favour after he had seen first-hand the proposed site and plans for the Christchurch RSA's bowling green at Hagley Park.⁵⁸ In 1948 the inaugural NZRSA National Bowls Tournament was held at the Disabled Servicemen's Bowling Club in Wellington, with the final filmed by the National Film Unit. The main object was to renew comradeship, which was exemplified when keen bowler and former Dominion President Sir William Perry met an old 'cobber' whom he had not seen since they both returned home from the First World War. In 1949 the tournament was played at Christchurch RSA's new green in Hagley Park, and that same year Auckland RSA's bowling green was opened in Victoria Park.⁵⁹

The J R McKenzie Trust's support of returned servicemen and women would reduce in the ensuing decades as the need declined, but in the immediate post-war years it provided a much-needed welcome to those coming home broken by war.

The J R McKenzie Trust grants also allowed the RSA to initiate some community developments such as the establishment of disabled servicemen's bowling greens in each of the four main centres with grants of £250 each in 1944.



RSA badge: The '53' badge attachment indicates that the RSA member had paid their sub for 1953.

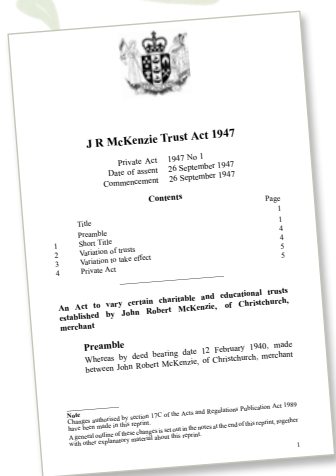
Author

The Big Trust gets bigger

By 1947, £35,600 had been distributed in grants during the first six years of the Trust. It became apparent, however, that the deed was too restricted, and so in 1947 J R McKenzie and the trustees gained the Labour government's support for Wellington Central MP Charles Chapman to submit a private member's bill to make the necessary changes to the Trust through an Act of Parliament.²⁹ The J R McKenzie Trust Act 1947 devoted one part to the three objects specified in the original deed — mainly returned servicemen, fatherless children, and underprivileged children — in a proportion to be fixed by the board, and the three remaining parts would be devoted to any charitable or educational purpose selected by the trustees.³⁰

In 1954, and now 77 years old, J R McKenzie reconstructed the McKenzie trusts through gaining further parliamentary legislation, the McKenzie Trusts Act 1954. For the J R McKenzie Trust, he now surrendered £100,000 preference shares in Rangatira Ltd for 566,000 'B' ordinary shares with a nominal value of £566,000 (\$32 million in 2020 money), vested in the personal trustees of the original 1940 deed. This was a significant additional gift to the Trust.³¹

With the J R McKenzie Trust now significantly larger in terms of capital it entered a new phase. The Rotary clubs in the four main centres were now to play a bigger role and were requested to set up a special committee, to be known as the J R McKenzie Trust Committee, for the purpose of scrutinising the multitude of applications for assistance through the various clubs in their district in order to make recommendations to the J R McKenzie Trust board. It was further acknowledgement that Rotary had inspired J R McKenzie in his lifetime to serve, and Rotarians were to be the trusted agents of his philanthropy and to serve his namesake Trust. This was not only a tribute to Rotarians, but in terms of monetary value their voluntary commitment saved the Trust significant amounts of money. In turn, at its national conference in 1954, Rotary acknowledged the service ethos and generosity of J R McKenzie with the presentation of a silver salver — it would be the last formal occasion that Rotary had the opportunity to acknowledge J R's three decades of service.³²



The J R McKenzie Trust Act 1947.
J R McKenzie Trust



Living Remembrance: The Heritage Children

Heritage Inc. provided children of deceased servicemen with the guidance that would have been available to them had their fathers lived. For the J R McKenzie Trust, Heritage was a natural means to support the children of those who had given the utmost service and paid the ultimate price for their country.

Inspired by Australia's Legacy, begun after the First World War, Heritage was founded as a dominion body by Wellington lawyer Oswald Mazengarb. Its first branch opened in Wellington on 10 August 1942, with Jaycees but also many Rotarians among its 325 branch members. It was Rotary, and specifically John Lott, that grew Heritage into a nationwide movement, and even an international movement when the Rotary Club of Philadelphia adopted the idea.⁶⁰ By 1944, Heritage had 10 branches and over 2000 members throughout the country providing male mentorship to children of deceased servicemen, supporting their children through school and into apprenticeships or tertiary education, and even into their first jobs and careers. The guiding philosophy was discussed in an article published in the RSA's *Review* in 1944:

Heritage works on the principle that no boy or girl shall suffer through the loss of a father at war. The secret desire of every member is that children made fatherless by the war shall have even better opportunities than might have been theirs under ordinary circumstances.⁶¹

After the war and under the patronage of Governor-General Sir Bernard Freyberg VC, funds began to flow into Heritage to assist with education and extracurricular activities. From 1945 too, the J R McKenzie Trust provided the first of what would become annual grants to Heritage, and by 1962 the Trust had contributed a total of £29,000 (\$1.3 million in 2020 money). By that time, some 5000 'Heritage children', as they became known, had received assistance.⁶²

Heritage children on an outing to Lake Ellesmere, c.1950. Reed, 1962

In 1954 there was also a significant change in personalities; inaugural chairman John Barton retired and J R's long-trusted business colleague and fellow Rotarian Sir John Ilott took over the chairmanship on the nomination of the governor-general. He would serve for the next 17 years and retire in 1971, aged 87 years. It became a feature of the Trust to have long tenures of chairs as it provided the benefits of retaining institutional knowledge, consistency and continuity. In 1954 too, Wellington Rotarian Clarence (Clarrie) Meachen took over the role as secretary to the Trust. Sir Wilfred Sim had taken over as the New Zealand Legal Society's nominee in 1947 and would serve on the Trust until 1973; (later Sir) Duncan Stout took over as the nominee of the British Medical Association in 1956, serving on the Trust until 1970.

The next generation

The death of its founder Sir John McKenzie in August 1955 was a sad occasion for the Trust, as it was for many other organisations and institutions: Rotary, RSA, Plunket, Parliament and all the voluntary organisations that had received his support throughout the country. Sir John's legacy for the Trust that carried his name was not just his munificent gifts, but also an enduring spirit of service and sense of social justice for New Zealanders. The strongest exemplar of this spirit was Sir John's own son, Roy McKenzie, who in his early 30s and within a short period had endured the loss of both parents and become responsible for his family's extensive business and philanthropic interests.

The 'old man' had ensured that Roy McKenzie grew up knowing the value of hard work and with an understanding of service and social justice. He had also grown up with Rotary and its ethos of service. In fact, he had been delivered by a Wellington Rotarian and one of the founders of the Plunket Society, Dr Austen Levy; after the Second World War he had worked in the office of the accounting firm of Wellington Rotarian Harry Nankervis while finishing his accountancy studies; and he then joined the McKenzies family firm in 1950, where many employees were Rotarians.

As a schoolboy, Roy had attended ‘father and son’ days at the Rotary Club of Christchurch and Rotary Gala Days at Roydon Lodge during the 1930s. He joined the Rotary Club of Wellington in 1954 at the age of 31 years, was one of the club’s youngest members, and would become one of its most prominent members for the next 50+ years. However, as Roy McKenzie recalls in his memoir, ‘Father’s greatest legacy to me was an involvement as a Trustee of the J R McKenzie Trust at an early age.’³³ Roy had joined the Trust in 1949 in his mid-20s and indeed it is his youth that stands out in photographs of the Trust during the post-war decades. He was, therefore, well versed in the practicalities and significance of the ‘Big Trust’ by the time of his father’s death in 1955.

From the mid-1950s, new, larger grants for specific objects began to be distributed, and, unsurprisingly due to the cause of the deaths of its benefactors, started with the establishment in 1956 of the McKenzie Research Fellowship into cancer at the University of Otago Medical School, and annual grants to the Cancer Campaign Society.³⁴

J R McKenzie Trust board in Wellington, 16 October 1958. **Seated:** Sir Wilfred Sim (NZ Law Society nominee), Sir Alexander Roberts (personal trustee), Sir John Ilott (chair), Alfred Duncan (personal trustee), Roy McKenzie (personal trustee) and George Hartshorn (Rotary Club of Auckland). **Standing:** Duncan Stout (NZ Branch of the British Medical Association nominee), Charles Greenslade (Rotary Club of Dunedin), William McDonald (Rotary Club of Christchurch), Alfred Newall (Rotary District 298 Governor), George Kerslake (Rotary District 294 Governor), John Ledgerwood (Rotary District 298 Governor), Frank Drewitt (Rotary Club of Wellington) and Clarence Meachen (secretary).
Alexander Turnbull Library



Sir John Ilott, chairman 1954–1971

John Ilott changed the face of advertising in New Zealand; used his fortune to promote the arts, literacy and a range of worthy causes; and as a lifelong Rotarian was a close colleague of J R McKenzie and served as a chairman on his company and trust.

John Moody Albert Ilott was born at Te Aroha on 12 August 1884, but educated at Wellington College. He started in his father's advertising company J. Ilott Ltd in 1903, and took over as managing director in 1917, enhancing the agency's reputation for innovative campaigns for a range of businesses and causes. Under his direction, Ilott Advertising went international and spread to London and Australia. He retired as managing director in 1952, but continued as its chairman, and held similar positions on many other large New Zealand companies including McKenzies (NZ) Ltd. He had earlier joined as a director when McKenzies Ltd became a public company in 1936, and in 1955 took over as chairman.⁶³



John Moody Albert Ilott on the day he became president of the Rotary Club of Wellington, 1 September 1930.

Alexander Turnbull Library

John Ilott was not only a suave businessman but, like J R McKenzie, he was also a stalwart Rotarian. In fact, Ilott was a founding member of the Rotary Club of Wellington and the sole charter member to celebrate the club's golden jubilee in 1971. He had been club president in 1929–30, district governor 1934–35 and second vice-president of Rotary International 1944–45, and personally knew Rotary's founder Paul Harris. Like J R McKenzie, Ilott lived the Rotary motto of 'Service Above Self'.⁶⁴ Throughout his life, John Ilott played an active part in many charitable organisations and had helped form the New Zealand Crippled Children Society in 1934–35 and grow Heritage Inc during the war. Sir John received his knighthood from Queen Elizabeth II in Wellington during her tour in 1954 for his services to the community. Later that year Sir John Ilott became chairman of the J R McKenzie Trust and served in that office until 1971, retiring at the age of 87. With the nickname 'The Dynamo' for his relentless attitude to work and life, there is no wonder the two Sir Johns saw eye-to-eye in so many aspects of life.

John Ilott, who died in 1973, had donated an extensive collection of international etchings and engravings to the National Art Gallery, now part of Te Papa, and his other legacy was the John Ilott Charitable Trust, set up in 1960 and administered by the Rotary Club of Wellington, to provide assistance to a range of special projects.⁶⁵

In 1958 the McKenzie Research Fellowship for Education Research was the beginning of a history of significant research fellowships in the field of education. By 1959 the other large grants continued to be Heritage Inc (£2700), Plunket (£800) and the RSA (£750). The J R McKenzie Youth Education Fund was also now distributing £2500. By 1959, the national organisations included, amongst many others, the Missions to Seamen and other port welfare organisations; Church Army and Women's Christian Temperance Union; early childhood education organisations such as the Free Kindergarten Union and the Federation of Nursery Play Centre Associations (now Playcentre Aotearoa); youth organisations such as Boy Scouts, Boys' Brigade, Girl Guides and Girls' Brigade; Family Guidance Centres and the Federation of Parents Centres; Intellectually Handicapped Children's Parents Association (which became the IHC Society in 1962); and the Forest and Bird Protection Society and its work among schoolchildren. By 1959 the annual grant was now up to £34,875 and after each distribution meeting it had become routine to release a press statement, often published in newspapers with a photograph of the board meeting, to disseminate news of the successful applicants and as means of providing publicity to ensure future applications.³⁵

By 1959 the J R McKenzie Trust had distributed a total of £237,650 during the previous two decades. In the immediate post-war period it had assisted returned servicemen and families to rehabilitate, and children fatherless because of the war to be given every chance of a normal life; it had helped Plunket to raise the largest post-war generation, made a start at medical and educational research, and assisted a wide array of voluntary social organisations to develop communities and help those in need in society. After two decades, the J R McKenzie Trust was well established and well known on the philanthropic and voluntary social welfare landscape.

1955 grants distribution

Benefit soldiers, sailors and airmen.....	£1,500
Youth work.....	£4,400
Children's work.....	£4,450
General objects.....	£4,400
Care of aged.....	£6,550

	\$21,000

Birthright New Zealand

From 1945 the J R McKenzie Trust had strongly supported Heritage Inc to assist families that had lost a father during the war. By the 1950s it became apparent there was a similar need to assist many other families where the father had died, and still later to support single parent families. Birthright was born in the mid-1950s, and Roy and Shirley McKenzie, and the J R McKenzie Trust, were early supporters.

The first Birthright Society was formed in Hastings in 1955 by lawyer Peter Gifford and the Hastings Junior Chamber of Commerce (Jaycee). Gifford's aim was

Women hold up posters and collection boxes during a public appeal to support Birthright New Zealand, 1959.

Alexander Turnbull Library



to form a voluntary organisation to support and care for the children of women who had lost their husbands. Later, it was extended to those children whose mothers were on their own due to separation, desertion, divorce or death of a spouse. The philosophy behind this new organisation was 'every child is entitled to a birthright' — regardless of whether they had two parents or not. Not only was this the first organisation of its kind in New Zealand, it was also the first in the world. It was a bold, but much-needed organisation at a time when there was still a stigma about single-parent families, in fact reinforced by the Mazengarb inquiry only a year earlier.

A branch of Birthright was soon underway in Wellington and asked the Rotary Club of Wellington to provide a committee member, and new parent Roy McKenzie was selected. That became 'the beginning of twenty years of good experience in Birthright' for Roy and Shirley McKenzie, and ended with Sir Roy and Lady McKenzie as patrons. The experience in turn, recalled Roy McKenzie, 'taught me how first-hand knowledge of an organisation's work could help the case for more generous support from trustees of the J R McKenzie Trust.'⁶⁶ It would be a life lesson that he would bring later to his chairmanship of the Trust and other philanthropic initiatives.

The J R McKenzie Trust provided early grants to the local branches of Birthright during the late 1950s.⁶⁷ In 1961 a national body was formed, Birthright New Zealand, and the Trust would fund the salary for a part-time national secretary. In 1976 the Trust provided the first retraining grant for young parents, and Rangatira shares were later donated to support this activity. By the late 1990s Birthright had 26 branches assisting 6000 families and 10,000 children.⁶⁸

Today Birthright has 14 branches operating around the country offering social services for children and families, especially those families led by one person.⁶⁹

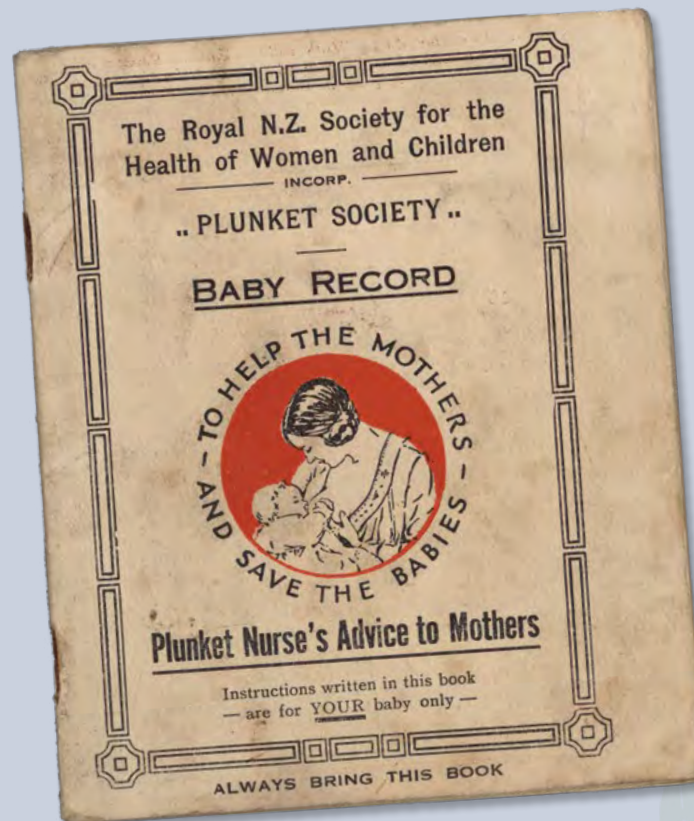
Gifford's aim was to form a voluntary organisation to support and care for the children of women who had lost their husbands. Later, it was extended to those children whose mothers were on their own due to separation, desertion, divorce or death of a spouse.



Raising the baby-boom generation

By the Second World War the Plunket Society, founded in 1907, was already well established in New Zealand, and indeed was world famous. The war years were significant ones for Plunket with the justified belief it was undertaking national service, and after the war its services were vital during the long, baby-boom years. Plunket was already well funded by the Labour government as its services matched with the government's own vision for the New Zealand welfare state.⁷⁰ Nonetheless, in 1940 J R McKenzie's hope for his 'munificent gift' was for an impact for generations, and the health and well being of children was core to his vision. As the only specifically named beneficiary organisation in the original Trust deed, the relationship between Plunket and the J R McKenzie Trust was a bonny one from birth. Indeed, J R McKenzie was appointed to the advisory committee to Plunket.

One area where the J R McKenzie Trust made a significant and transformative impact was funding the training of Māori Karitane and Plunket nurses from as





Mother and baby at the Royal New Zealand Plunket Society Karitane Home, Melrose, Wellington, 7 May 1957.

Alexander Turnbull Library

early as 1940.⁷¹ The relationship between Pākehā Plunket nurses and Māori mothers was never as strong as with Pākehā mothers; often nurses would not visit Māori homes and Māori mothers were reluctant to come into Plunket rooms, and yet the need was massive with the Māori infant mortality rate four times that of Pākehā infants.⁷² By 1952, Plunket could report that the Māori nurses trained with funding from the J R McKenzie Trust had 'proved very satisfactory'.⁷³ It was a start, albeit a small one (and there was significant ground to catch up), and it reveals an early appreciation by the Trust of the need to provide Māori with the means for intergenerational transformation.



“But money is not always the most important ingredient. Sharing visions, counselling, advising, and just supporting people has high value.”





Chapter Two

The second generation

1960–1980

“But money is not always the most important ingredient. Sharing visions, counselling, advising, and just supporting people has high value.”

Roy McKenzie, 1998⁷⁴

The J R McKenzie Trust started its second 20 years a trusted philanthropic organisation, and it was steady at the helm throughout the 1960s. The 1970s would see the Trust change tack somewhat under the chairmanship of Roy McKenzie, who would bring his own business acumen, energy and personal philosophy of connected and creative giving. It was the start of a significant consolidation of the McKenzie family legacy of giving.

The ‘swinging’ or ‘steady 60s’?

In popular memory the ‘swinging 60s’ supposedly left the conservative 50s in their wake; it was a time when people ‘made love not war’ and took ‘trips’ without leaving home.⁷⁵ This is more an American popular memory, and even then, more the experience of a limited subculture on the US West Coast. For most New Zealanders, the 1960s were less exciting as they got on with work and raising families. New Zealand was still in the midst of the post-war baby-boom, peaking in 1961 when 65,390 babies were born before ending in 1964.⁷⁶ A strong economy based on high wool prices and secure markets meant that, as in the 1950s, New Zealand enjoyed one of the highest standards of living in the world. McKenzies department stores continued to expand during the decade. It was only when the export price for wool fell dramatically in 1967 that the country was shaken by a sharp rise in unemployment and inflation.

The arrival of television in 1960 and its rapid uptake (with more than half a million sets by 1968) shrank the world. From their living rooms, New Zealanders watched Neil Armstrong make his ‘one small step’ on the surface of the moon. The Beatles, the Rolling Stones, and other British bands brought the latest music to Kiwi teenagers. Older New Zealanders viewed this new youth culture with disdain and were appalled by the

Previous page:
Roy McKenzie, 1958.
J R McKenzie Trust



A still from the 1969 McKenzies television commercial showing the McKenzies shopping reporter in store, and with 'pick n mix' in 1971.

Alexander Turnbull Library



Takapuna store frontage during a sales promotion associated with the visit of Surfers Paradise meter maids during the 1960s.

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The Beatles on the balcony of the Hotel St George, Wellington, c. 20 June 1964.
Alexander Turnbull Library



Hutt Park Raceway night trotting meet at Lower Hutt on 25 February 1960.
Alexander Turnbull Library



hysteria associated with the Beatles tour of 1964. They countered with renewed support for traditional and new youth programmes. In 1966 Lyndon B. Johnson became the first US president to visit New Zealand, and he stayed at Roy McKenzie's White Heron motel/hotel complex near Wellington Airport. Kiwis also began to express themselves on a range of international issues, including the Vietnam War.

The National Party led by 'Kiwi' Keith Holyoake swept to power in 1960 and remained there until 1972 on the back of a vision to preserve economic prosperity and social stability, best summed up by the 1963 election slogan 'Steady as she goes'. New Zealanders drank to that — all 71 litres of beer per person each year, and a good deal of it down at the pub before six o'clock closing until the extension of hours in 1967.⁷⁷ In the 1960s, 'rugby, racing and beer' held sway in New Zealand culture. Kiwis attended racecourses in large numbers, and a good number would have seen Roy McKenzie driving one of his Roydon Lodge trotters. At the J R McKenzie Trust, members were making decisions to ensure that New Zealanders who were neither swinging nor that steady were being supported in society.

Trusted work

How much the shadow of the Second World War had receded by the 1960s can be gauged by the J R McKenzie Trust providing the RSA with its last regular annual grant of £700 in 1962. The Trust, however, acknowledged that the 2000 'Heritage children' of deceased servicemen still needed financial support, and granted £3500 (\$150,000 in 2020 money). By 1962 the Trust had provided a total of £28,850 (\$1.3 million in 2020 money) and some 5000 children had been assisted by Heritage Inc over the previous twenty years.⁷⁸ Heritage and Birthright continued to be provided the same level of support throughout the decade. Plunket, too, continued to be fully supported as the baby boom reached its peak early in the decade, and the Trust returned to one of its earliest supported programmes with significant grants for bursaries for Karitane Nurse trainees.

Myriad organisations concerned with children (Kindergarten

Association, Play Centre Federation) and youth (Scouts and Guides, Boys' and Girls' Brigade, YMCA and YWCA) were supported, including some new ones, such as Outward Bound from 1962 and the Duke of Edinburgh's Award from 1963.

Medical and education research continued too. At the start of the decade the medical research funding completed the five-year programme of cancer research with the Cancer Society, and by the end of the decade the Trust was funding heart research through support of the National Heart Foundation with a two-year grant in 1969 of \$8000 (\$140,000 in 2020 money), in addition to the two J R McKenzie Fellowships in medical

NEW FACES IN MCKENZIE TRUST BOARD



The McKenzie Trust board, with two new members, which met in Wellington today to decide on the annual distribution of grants. The new men are Mr. G. W. Drake, of Auckland, and Dr. A. M. Hartnell, of Christchurch. Seated are (from left): Messrs. G. Hartshorn, R. A. McKenzie, F. Drewitt, E. A. Jones, Sir Wilfrid Sim, Sir John Hott (chairman), C. M. Greenslade, Dr. A. M. Hartnell, and B. Bendall. Standing: Messrs. C. Meachen (secretary), G. W. Drake, H. A. Carter, F. J. Beattie, Sir Duncan Stout.

The J R McKenzie Trust board in 1962. Roy McKenzie (second from left) and the chair Sir John Hott seated at the head of the table.

J R McKenzie Trust

research, worth \$4000 each, at Otago and Wellington.⁷⁹ In educational research, grants supported research into Māori child education via the New Zealand Māori Council throughout the decade, and the J R McKenzie Fellowship in education research to the value of \$3000 each year.

By the 1960s, the maturing baby-boom generation, prosperity and growing middle-class aspirations resulted in a building boom of university residential colleges and halls, and the Trust was making grants to provide recreational facilities. One of the earliest grants in 1960 was to furnish the 'J R McKenzie Room' in the Home Science Residential Hall at the University of Otago.⁸⁰

The Trust continued to assist a wide array of voluntary social organisations to support the care of the elderly (various rest homes and hospitals), those with disabilities and medical conditions (IHC, Epilepsy, Alcoholism, and Amputees) and generally to help those in need in society (the various City Missions and church social services such as the Salvation Army, Presbyterian Support Services and St Vincent de Paul Society). There was also support for a variety of other organisations, from New Zealand Mountain Rescue to surf lifesaving clubs.

The J R McKenzie Trust now had a well-established and trusted formula of distribution: educational and medical research (12.5 per cent); care of the aged (13.5 per cent); youth work (25 per cent); aid for children's work (18 per cent); welfare (15 per cent); and education (16 per cent). Half to special objects and national projects and half to local grants made on a population basis of two-thirds to the North Island and one-third to the South Island: one-third each to Auckland and Wellington and one sixth each to Christchurch and Dunedin.

Rotarians around the country made the wheels go round for the Trust, including part-time secretary Clarrie Meachen in Wellington, with clubs in the regions bringing proposals to the metropolitan J R McKenzie Trust club committees, local Rotarians serving on those committees and sifting through the

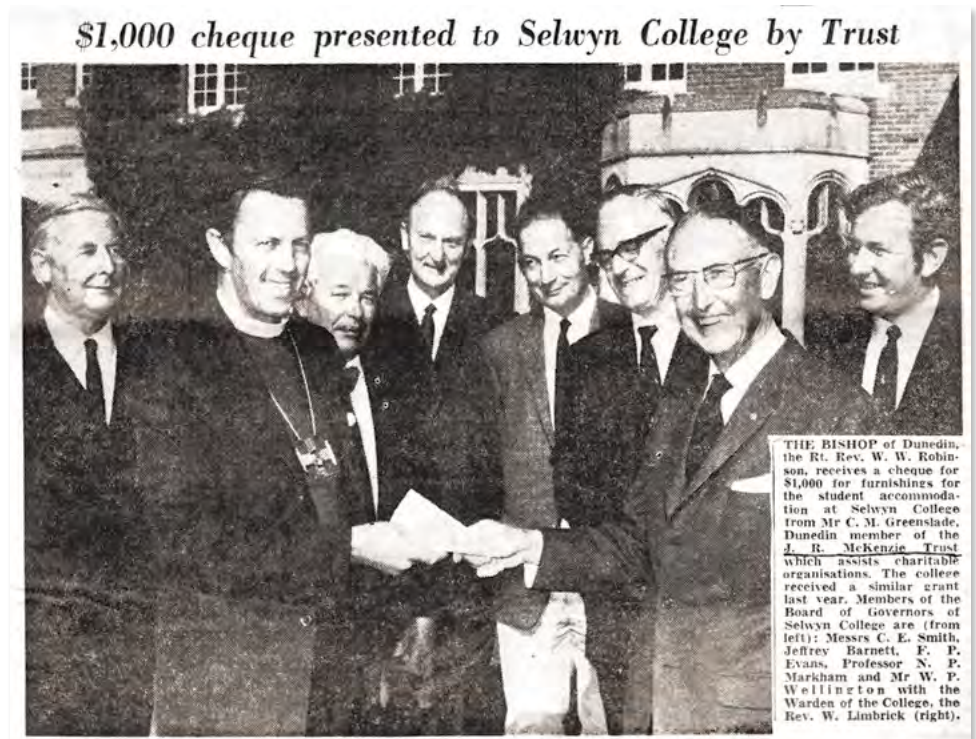
1960 grants distribution

Welfare (Merchant seamen etc.)	£1,700
Educational	£2,500
General objects	£4,400
Care of aged	£5,775
Youth work	£8,900
Aid for Children's work	£9,675

	£32,950

The Anglican Archbishop of Dunedin Rt Revd Walter Robinson receives a cheque for \$1000 for furnishings for student accommodation at Selwyn College, University of Otago, from trustee Charles Greenslade in 1970. The college had received a similar grant from the J R McKenzie Trust in 1969.

J R McKenzie Trust



hundreds of applications, and making the decisions as board members on the Trust itself. The fact they were now rotating less often on to and off the board helped too because trustees built up significant institutional knowledge and connections with voluntary organisations. Continuity was a significant factor for the J R McKenzie Trust. With the death of the inaugural personal trustee, Sir Alexander Roberts, in 1961, Hugh Carter (Roy McKenzie's cousin) came on to the Trust as a personal trustee, alongside Alf Duncan and Roy McKenzie. Sir John Illott continued in the chair; he turned 80 years in 1964, but 'The Dynamo' showed no signs of slowing down.

'Rotary', for Roy McKenzie, like his father, 'played a very positive part in my life.'⁸¹ Roy managed to go one better than his father, with what he believed would have made the 'old man' prouder than anything else he did, when he became president of the Rotary Club of Wellington in 1967 at 44 years of age. It was a time when Roy McKenzie began his life of creative giving with the establishment of his own foundation.

A second generation trust: McKenzie Education Foundation

In the mid 1960s, now middle-aged, and after 20 years serving as a trustee of both the J R McKenzie Youth Education Fund and the J R McKenzie Trust, Roy McKenzie established the first of two personal foundations in his lifetime, the McKenzie Education Foundation.

With \$500,000 worth of Rangatira Ltd shares, inherited in 1952 prior to his 21st birthday, Roy established the McKenzie Education Foundation (recalling education had been the first of his father's trusts and the similar names would cause some confusion), but run quite differently to both his father's trusts. First, it had a far greater ability to co-opt as trustees people who were involved in social issues and able to bring their valuable experience to the Foundation, starting with the initial trustees Roy himself (1966–86) as chairman and administrator (with the assistance of a succession of personal secretaries), Ray Mathews (1967–86), Guy Smith (1966–74), Robert Steele (1966–84) and John Watson (1967–86). Co-opted trustees were Tina Reid (1972–80), Beverley Wakem (1977–80), Jill Main (1977–80), Diana Crossan (1977–86), June Johnston (1981–86), Sir David Beattie (1970–80), Tim Dyce (1972–86), Basil Potter (1978–86) and Margaret Gilling (1985–86). Second, the capital plus income was to be expended in a finite period, over 20 years, and Roy was keen for the trustees to identify and develop their own projects as they saw the need. The objective was largely to invest in developing talent, enabling people to overcome obstacles and front up to challenges. Finally, and perhaps the greatest contrast with the Big Trust as it operated in 1966, 'The aim was to attack the causes of social problems rather than alleviating their symptoms.'

The objects of the Foundation were flexible but its main emphasis was to be on education: improved teaching methods and education; medical education and research; greater recognition of teaching arts and crafts; encouragement of outdoor education youth voluntary service; higher education for the disadvantaged; innovative teaching for youth in institutions; and experimental approaches to providing employment for invalids and the disabled.

One of the first projects came after Roy McKenzie visited a Mt Wellington Residential School providing residential care for children with learning difficulties

The establishment of the McKenzie Education Foundation in 1966 provides an understanding of the evolution of the creative giving philosophy of Roy McKenzie and how he would come to influence the Big Trust in his role as chair from 1971.

and behavioural problems, with quite a number coming from the South Island. It crystallised the idea that his former family homestead in Christchurch, with its wonderful garden setting, would make an ideal school for residential care for children aged 8 to 12 years in the South Island. He offered the home to the government, but by late 1967 the economy had deteriorated and so the Foundation purchased the property and offered it free to the government, provided it established the school. In 1971 the McKenzie Residential School opened and operated for the next 40 years.

When completing his accountancy degree at evening classes at Victoria University College in the late 1940s (he had started it at the University of Otago, but had been interrupted by the war), Roy McKenzie experienced poor teaching and in the end he enrolled at a private firm that taught commercial subjects. This was a driving force in improving education and teaching all his life. In the 1960s universities too were looking to improve their teaching styles with the influx of now large numbers of students. With John Watson, the Foundation provided Victoria University of Wellington with \$90,000 over five years to establish the University Teaching and Development Centre in 1972.

A meeting with Dr Bill Keith in 1973, then based at the Department of Health's National Audiology Centre in Auckland, convinced Roy McKenzie of the benefits of music therapy for children with hearing difficulties, which was reinforced when the Foundation brought out the music therapist Maggie Pickett

Roydon Lodge, 1940s
Alexander Turnbull Library



from the United Kingdom in 1977. By 1978–79 the Foundation was providing a salary for therapist Mary Edwards to run the McKenzie Music Therapy Centre in Auckland, and during the 1980s the Foundation provided more than \$100,000 to fund several scholarships and travel grants for New Zealanders to qualify as music therapists overseas. The J R McKenzie Trust also provided an annual grant to the New Zealand Society for Music Therapy from the late 1970s.

It was the Foundation's assistance to New Zealand's first public hospital audiologist, Michael Parsons, to go overseas to study services for the Deaf in 1973, and the subsequent report, *Helping our Deaf Children*, published by the New Zealand Council for Educational Research at a time when government assistance 'was appalling', that caught the imagination of Roy McKenzie and his sense of social justice for this significant community of 'silent disability'. Both his McKenzie Education Foundation and later the Roy McKenzie Foundation, through significant funding, would raise awareness and provide assistance to improve the lives of the Deaf in New Zealand.

In this way the McKenzie Education Foundation had expended \$2 million by 1986 and the residue of the funds would go towards the establishment of the Roy McKenzie Foundation (discussed in the next chapter). The establishment of the McKenzie Education Foundation in 1966 provides an understanding of the evolution of the creative giving philosophy of Roy McKenzie. and how he would come to influence the Big Trust in his role as chair from 1971.⁹³



Aerial view of the McKenzie Residential School in Yaldhurst Road, Riccarton.
A Manner of Giving

'To serve, to strive and not to yield' — Outward Bound

Outward Bound responded to the challenge of the rise of youth culture with a programme for young people to challenge themselves. Roy McKenzie and the J R McKenzie Trust were there from the start. Today, Outward Bound is New Zealand's leading organisation that empowers people of all ages, cultures, abilities and backgrounds 'to make life-changing journeys of self-discovery through shared adventures in te ao tūroa, the natural world' and thereby 'to help create better people, better communities, and a better world'.⁹⁴

Outward Bound New Zealand at Anakiwa in Queen Charlotte Sound.
Outward Bound

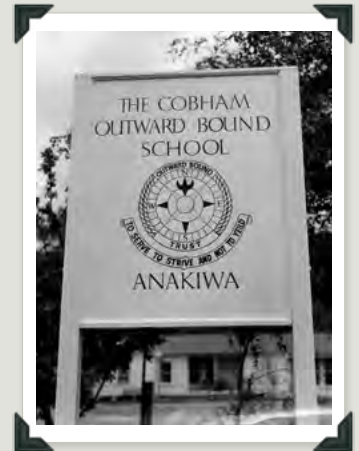
Outward Bound is an outdoor experiential programme. Outward Bounders learn about themselves and others by taking responsibility over the challenge ahead of them, whether it's leading the way on an expedition, managing their team to complete a kayak journey, or undertaking the famous solo overnight stay in the bush. The experience of trying new things and being challenged builds confidence, resilience and transferable skills applicable to work, study and home — and lasts for life.

Outward Bound was first established by educationalist Kurt Hahn in the United Kingdom during the Second World War. The New Zealand Outward



Bound Trust was driven by Governor-General Lord Cobham and a group of prominent individuals around the country, including Auckland Rotarians Dr Fergus Taylor and Woolf Fisher (co-founder of the whiteware company Fisher & Paykel), and Roy McKenzie. The Trust purchased a five-acre property at Anakiwa in Queen Charlotte Sound, Marlborough, and the Cobham Outward Bound School, as it was originally known, was opened in 1962. The outdoor adventure and challenge courses were initially for young men only, some 3500 in the first six years. The first young women went through Anakiwa in 1973. The focus for many years was on youth, but over time this widened to include disabled groups and people aged from 13 to 80 years. Today, upwards of 2000 attend a course each year, one third aged 13 to 17, one third aged 18 to 26 and the other third 27 and over.⁹⁵

From the outset, McKenzies Ltd provided early support with office space, trucks and equipment, while the J R McKenzie Trust was a key sponsor in the original establishment of Outward Bound at Anakiwa, with an initial grant of £1400 (\$64,000 in 2020 money) in 1962, and similar follow-up grants over the next five years, enabling the purchase of the adjacent 22-acre property that became known as McKenzie Field.⁹⁶ It was the start of decades of support to Outward Bound by the Trust. The J R McKenzie Youth Education Fund also provided Sir Roy McKenzie Scholarships to many financially disadvantaged young people to attend Outward Bound. The McKenzie family's support of Outward Bound also came directly through Rangatira Ltd, with Outward Bound being one of the



The Cobham Outward Bound School, Anakiwa.
Auckland Libraries Heritage Collections



An Outward Bound course in the 1960s.
Auckland Libraries Heritage Collections

community and charitable organisations owning shares. The dividends Outward Bound receives from its Rangatira shareholding have been significant, enabling it to set up long-term strategies for supporting low socio-economic communities across New Zealand. Through the generosity and foresight of Sir Roy, the ongoing support of the J R McKenzie Trust and Rangatira Ltd, thousands of young New Zealanders have come to realise their true potential and go on to make a positive contribution to New Zealand society.

'Before OB [Outward Bound] I was hesitant about what I really wanted to do and was too afraid to take risks and explore the things I may or may not enjoy,' recalls Conin Whakatihi, who attended a Classic course with the support of a Sir Roy McKenzie Scholarship and afterwards enrolled in university with a greater sense of belonging to the community and understanding of service. 'Outward Bound has taught me everything we do is to better help others. If you're not trying to better yourself you're not doing anything. Everything that is hard or tough is good because it's a challenge and it'll cause you to grow. I challenge myself now as much as I can.'⁹⁷

Through Sir Roy's belief in the untapped potential of New Zealand's youth — and he sent his own children Peter and John on Outward Bound programmes in its first decade — the McKenzie name is truly embedded in the history of Outward Bound. The past president and patron (1977–2003) is remembered through the Roy McKenzie Lodge, McKenzie watchhouse, and the support vessel the *Sir Roy*. Not only did he sponsor many young people, but as a result of his significant bequest to the Outward Bound Foundation, his legacy of supporting those who would otherwise not have an opportunity to experience Outward Bound lives on.⁹⁸

Sir Roy and Dr Fergus Taylor unveil a plaque at Anakiwa during the silver jubilee celebrations in 1987.

Alexander Turnbull Library



Golden gifts: Rotary's golden jubilee in 1971

A period when Rotary's golden wheel had rolled out throughout the land, with 182 clubs and over 10,000 members by 1971, was capped in that year with the golden jubilee of Rotary in New Zealand. The foundation club of Wellington held a celebratory dinner in June 1971. 'Rotary is a tremendous force in social affairs,' responded sole surviving charter member Sir John Illott when asked to reflect on the social impact of Rotary during the first 50 years. The J R McKenzie Trust chair, former Rotary club president, district governor and Rotary International second vice-president, added emphatically, 'Every good work has the support of the Rotary movement.'⁹⁹ Wellington Rotarian Roy McKenzie was there too, and on the issue of doing good works observed that, 'Good projects taking longer than one year to complete seemed to be lost, and there was reluctance to consider projects taking, perhaps, two years or even more to complete, which again I think is disappointing.' Within months Roy would be taking over the reins from Sir John at the Trust.

It was the start of a year of celebrations and the golden jubilee projects gleamed. The J R McKenzie Trust supported many of the club projects around the country, such as the completion of Shantytown Heritage Park in Greymouth, and each of the four major district projects, with several initial grants of \$1,500: two of the three North Island districts supported Pacific communities in New Zealand, while the South Island district supported public health research at the University



Rotary pin.
Author

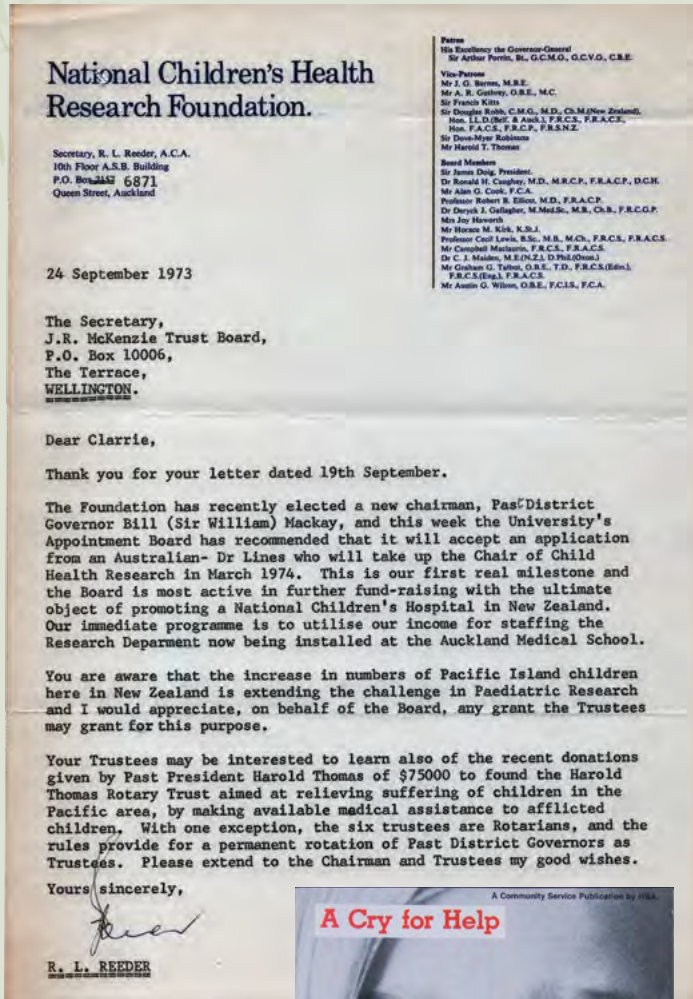


Rotary International in
New Zealand 1921–1971 stamp.
NZ Post



Roy at Rotary: The Rotary Club of Wellington past club presidents honour their executive secretary Florence Morton Low on her retirement, 19 July 1971. Roy McKenzie (back row, fifth from left), always the youngest and typically staying out of the limelight.

Alexander Turnbull Library



Correspondence from the National Children's Health Research Foundation, 24 September 1973.

J R McKenzie Trust

National Children's Health Research Foundation 'A Cry for Help' campaign leaflet, 1980s.

Te Papa Tongarewa
Museum of New Zealand



of Otago. The Auckland district jubilee project was the most ambitious and would provide the greatest legacy.¹⁰⁰

Auckland Rotarian and paediatrician Dr Ron Caughey, concerned with New Zealand's child health dropping in world rankings, persuaded his Auckland club and district to raise \$250,000 (\$3.5 million in 2020 money) in order to establish the National Children's Health Research Foundation — the organisation well-known today as Cure Kids. The J R McKenzie Trust provided an initial grant of \$1,500 and follow-up grants. The long-term objective was a centre for child health research that would enhance an eventual National Children's Hospital in Auckland, which was finally achieved when Starship opened in 1991. Since its inception, Cure Kids has raised \$60 million to carry out world-class research, including that undertaken by co-founder the late Emeritus Professor Sir Bob Elliott, into childhood cancers, inherited heart conditions, epilepsy, infectious diseases, cystic fibrosis, sudden unexplained death in infancy (SUDI), stillbirth, burns, and child and adolescent mental health. Cure Kids has made a difference in the lives of thousands of children and the overall health of the nation, over the last 50 years. It was truly a golden gift.¹⁰¹

Ch-ch-ch-ch-changes

David Bowie's 1971 song 'Changes' captured the mood of the times in New Zealand — the start of an era of easy jet travel, new technology and social change. New Zealand society underwent a generational change with the post-war baby-boom generation coming to prominence. It was the first 'O E' generation that did not have to pack a rifle. Peter McKenzie undertook an Outback Experience in Australia. There was a change of government in 1972 under the Norman Kirk-led Labour party that sent two frigates and one cabinet minister to protest nuclear testing in French Polynesia. There was jubilation with the Christchurch Commonwealth Games in 1974, marking the first major event showcased on colour television; and a celebration of national identity with 'God Defend New Zealand' now joining 'God Save the Queen' as a national anthem, and even a New Zealand Day on 6 February 1974, renamed Waitangi Day in 1975.

The 1975 land march and high-profile protests, such as that at Bastion Point in 1977–78, highlighted the issue of Māori land loss. The establishment of the Waitangi Tribunal in 1975 was an important constitutional development: Māori could now seek redress from the Crown for breaches of the Treaty. Race relations suffered a setback with the controversial dawn raids by police on the homes of Pacific Island families looking for 'overstayers' who were alleged to have remained in the country after their visas expired.

The women's movement grew in strength through the decade, influencing significant legislative and social changes. Key issues for women included the right to safe, legal abortion; pay equity; matrimonial property rights; and legislation to outlaw discrimination against women.

The economic downturn from the mid-1970s in the wake of the 1973 oil crisis put the brakes on the good times; and the second oil crisis in 1979 resulted in the introduction of car-less days that brought New Zealanders to a halt one day a week, except for the record number of kiwi migrants who took to the skies. The National government under Prime Minister Robert Muldoon, responded with a 'Think Big' programme of major energy



Logo of the Commonwealth Games at Christchurch in 1974.

Wikipedia Public Domain

Netball at the Ōtara town centre car park in the days before Saturday shopping was re-introduced in 1980.

Auckland Libraries Heritage Collections



projects.⁸² The J R McKenzie Trust was also undergoing a change, and by the late 1970s was also starting to think of bigger projects under the direction of the second generation of the McKenzie family.

A new direction: Roy McKenzie in the chair

In October 1971, due to ill health, Sir John Ilott resigned as chair after 17 years' service and his death two years later was marked with board members standing in silent tribute.⁸³ Roy McKenzie now took over as chair of the Trust. He had stepped down as executive director of McKenzies Ltd in order to focus on the giving side of the family legacy. By this time he had already served on the Trust for almost a quarter of a century, a decade more than his own father, and so was well versed in its ways and the

good it had achieved, but also its limitations. Roy preferred to be known as a 'community volunteer' rather than a philanthropist because of its characterisation of simply writing out cheques whereas he preferred to get out and see where the money could do the most good, and he would bring this philosophy as chair to the J R McKenzie Trust. It would be the start of a shift as Roy McKenzie stamped his own identity on his father's Big Trust and through his own foundations and significant personal giving.

There were other changes on the board during the early 1970s. Personal trustees Alf Duncan and Hugh Carter (who gifted the Carter Fountain at Oriental Bay to Wellington in 1973) retired and W. Gee Taylor (Hugh Carter's brother-in-law) came on to the board as a personal trustee along with Roy McKenzie. Sir Wilfred Sim retired after 25 years as the representative of the chief justice and an amendment resulted in the position in the future representing the president of the New Zealand Law Society with the hope of securing younger lawyers with community experience. With a new Rotary district in the central North Island from 1970, Rotary had a fourth district governor and a Hamilton club representative on the board. Finally, in 1974, Clarrie Meachen retired after 20 years' service as Trust secretary and Neil McKay, the secretary of the Order of St John, took over as part-time secretary.⁸⁴ The Trust still did not employ staff. The Trust was now meeting

Roy McKenzie (seated centre) in the chair for the J R McKenzie Trust board's 1977 grants distribution meeting. Secretary Neil McKay is seated to Roy's right-hand side.

J R McKenzie





The photograph shows the planting of the middle strip at the behest of Roy McKenzie during his time as president of the Rotary Club of Wellington in 1967–68. The new James Cook Hotel is in the background.
Digital Public Library of America

in the modern surroundings of the new James Cook Hotel on The Terrace, Wellington (see pages 86–87), but in keeping with its ethos those overnighting before the annual distribution meeting shared a twin room.

Less than 18 months after taking over as chair, Roy McKenzie called for a review of the Trust in 1973 with the objective to fund more specific, and more impactful, projects, and he requested the larger national organisations to consider how the Trust could better achieve this result.⁸⁵ It was part of the proactive nature of Roy McKenzie; not content to wait for applications he would personally encourage organisations to apply where he saw specific needs in the community. By 1974, McKenzie proposed to the board that from 1975 20 per cent of funding (between \$20,000 and \$30,000), should be reserved for significant projects, and he also raised the need for a research officer to develop potential projects. Research and survey was the modus operandi of Rotarians and it was definitely the way of Roy McKenzie. The kind of project he had in mind was the development of a McKenzie Residential School for troubled children in Wellington, like the one recently opened at the old family home in Christchurch in 1971. The chair recognised that, ‘This will be a fairly major change

of policy for the Board so it should provide for good discussion at the meeting.’⁸⁶

In the end, the Trust agreed to set aside \$20,000 for a special national project or projects and the possibility of more multi-year funding. In 1975, a special grant of \$5000 was made to produce the film *Birth* to mark International Women’s Year, and another to the same value for the Birkdale Beach Haven Community Push Project on the North Shore of Auckland to co-ordinate community improvement groups, social services and

community self-help volunteers, with an emphasis on youth activities, along with support for the Law Society to assist in the establishment of the first Neighbourhood Law Office in New Lynn.⁸⁷ In 1977, \$15,000 was provided to support care for the terminally ill at the start of the hospice movement in New Zealand. In 1979, major grants were made in support of the International Year of the Child and Rotary's project to open centres for the physically disabled at Royal Oak in Auckland and at Burwood in Christchurch (\$10,000 each), as well as grants for Plunket (\$10,000), Solutions for People Experiencing Learning Difficulties (SPELD: \$5,000) and the Society for Music Therapy (\$3,000).⁸⁸ The hand of Roy McKenzie can be seen in both the trend and the specific projects, but if as chair he influenced his father's Big Trust he was also backing it up with funding from his own McKenzie Education Foundation and 'jacket pocket' philanthropy.⁸⁹ The story of Te Omanga Hospice in Lower Hutt is a case in point (see pages 88–91).

The gift of advocacy

In the same manner that Roy McKenzie did not see himself in the mould of a traditional cheque-signing philanthropist, he was outspoken on social issues and spoke up on behalf of those without a voice. His personal advocacy also began to shape the J R McKenzie Trust.

In November 1974, for example, in its traditional press release the Trust took the unprecedented action of calling on the Bill Rowling-led Labour government, after the death of Norman Kirk three months earlier, to provide more support to voluntary welfare organisations, and specifically to fund field officers to identify the needs of families in the community throughout the country.⁹⁰

Five years later in 1979 — the Year of the Child — the Trust now called on the National government to establish a children's commission to act as an advocate for children's interests as a fitting outcome for the year.⁹¹ It would be another decade before the Office of the Children's Commissioner was established in 1989, and after the 1980s vindicated the Trust's early call for one.



International Year
of the Child 1979

UN Photo 387410

Facing challenges

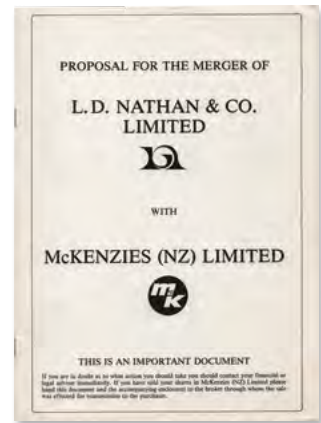
In 1979 the company LD Nathan made a successful offer to acquire McKenzies (NZ) Ltd and the company was no more by 1980. The McKenzies stores were closed or converted into Woolworths stores, its old competitor that had also been acquired by LD Nathan. In 1988 Lion merged with LD Nathan to form Lion Nathan and the Woolworths variety stores were rebranded DEKA. The supermarkets retained the Woolworths

Newspaper report about the merger between LD Nathan and McKenzies (NZ) Ltd, 1980. J R McKenzie Trust



brand until later rebranded as Countdown under new ownership in 2010. For a time, Rangatira Ltd held a position on the board of Lion Nathan and now, without a third of the profits of the McKenzies Ltd trading arm, Rangatira Ltd depended on strong investment partnerships that drove dividends for the J R McKenzie Trust and its other McKenzie-related charity shareholders. After 70 years the McKenzie name may have disappeared from the main streets and suburban shopping centres of New Zealand cities and towns, but it continued to live on in the J R McKenzie Trust and to make a difference in the lives of New Zealanders.

In 1980 — the Trust’s 40th anniversary — \$540,000 in grants was a significant increase on the previous year due to the sale of McKenzies, and it was the first time grants had topped half a million dollars. It took the total grants distributed to \$4 million during the previous four decades. In this celebratory year, however, the chair provided a sobering message in the annual report that the changing times were the greatest challenge for the Trust, and was reported in the newspapers under the headline ‘McKenzie Trust faces challenges’. Roy McKenzie warned that during the next decade upwards of 50 per cent of youth would not find jobs, where computers might reduce the working week to three days, and that increased working from home would require research into its social impact. In addition, an increase of single parent families as a result of the ‘social cancer’ of divorce, together with high levels of domestic violence, would require increased social and crisis counselling. ‘Our task is not so much distributing wealth as it is to see that wealth is employed for constructive purposes for the public good.’⁹² With hindsight, the following decades would certainly see wide-scale societal challenges confront voluntary welfare organisations and their supporter, the J R McKenzie Trust.



L D Nathan’s merger proposal document, 1979. J R McKenzie Trust

The challenges facing the J R McKenzie Trust, unknown newspaper, 1980. J R McKenzie Trust





Wellington icon: James Cook Hotel

James Cook Hotel as seen from
Lambton Quay, c. 1970s.
Digital Public Library of America

When the James Cook Hotel opened in 1972 it was the first hotel built in Wellington since before the Second World War and one of New Zealand's first international-class hotels. It was developed by Roy McKenzie with funding from Rangatira Ltd and would for many years be the home of the J R McKenzie Trust.

In the early 1960s Roy McKenzie and business colleague Peter Meikle, with financial backing from Rangatira Ltd, had developed the first motel/hotel type

accommodation in Wellington. The White Heron in Kilbirnie, close to Wellington airport (and operated today under the name Brentwood), was based on the motel/hotel model in California, breaking the monopoly in New Zealand of the old-style, brewery-owned hotels. It proved popular, not only with New Zealanders, but also international VIPs visiting Wellington, including President Lyndon Johnson and the Rolling Stones in 1966. The White Heron was sold later in the decade by Roy McKenzie to fund the development of Wellington's first modern high-rise hotel.

In the late 1960s, Roy McKenzie and Peter Meikle, again with Rangatira Ltd and also a government guarantee, successfully tendered for the airspace above the Wellington City Council's carpark on The Terrace to build an 11-storeyed hotel to fill the gap in the Wellington market for modern hotel accommodation and conference facilities. The site was ideal for a mid-city hotel, with its vehicle access from The Terrace, ample parking and direct lift access to Lambton Quay. Eventually, at a cost of \$3.2 million, it was the first hotel building in Wellington since 1938, with 198 rooms and complete with telephones able to call anywhere in the world, in a first for New Zealand hotels. It quickly became popular for business accommodation and conferences, and was a financial success. In 1981, a further 66 rooms were opened on an adjacent property. Roy McKenzie put the success of the James Cook Hotel down to it being an accommodation-driven as opposed to a liquor-driven operation (it held a tourism licence), the design of architect Albert Kofoed, and its welcoming staff, all making it a home away from home.¹⁰² The hotel became the base of the J R McKenzie Trust for decades, with members being accommodated and the annual meeting taking place in modern boardrooms.

McKenzie sold his 25 per cent share to fund the Roy McKenzie Foundation, and by the mid-1980s Rangatira Ltd owned 100 per cent. Rangatira partnered with and later sold the hotel to Grand Hotels International in the early 2000s, but the James Cook Hotel Grand Chancellor remains a Wellington icon. It is also an example of the contribution by Roy McKenzie and Rangatira Ltd to the New Zealand economy and the development of the tourism sector.



Souvenir programme for the McKenzies Ltd reunion in 1991.
J R McKenzie Trust

Te Omanga Hospice: 'A dream come true'

'If I was asked to name a single project that I believed answered the ideal purpose [of philanthropy] — in performance, in local response, and in national influence — I would say Te Omanga Hospice and the Hospice movement,' Roy McKenzie pointed out in his memoir.¹⁰³ The J R McKenzie Trust had from its early days provided significant grants towards care for the elderly and the sick. Some personal experiences of terminal illness and a visit to England's first hospice drove Roy McKenzie to help others to establish the first community-based hospice in New Zealand in 1979.

It was the experience of both parents dying of cancer, and the death of a close colleague in Christchurch during the mid-1970s, that sparked Roy's interest in the care of the terminally ill. In the case of his colleague, he had given up on his treatment because he could not face going into a hospital ward mostly full of

Te Omanga Hospice on the new site at 136 Woburn Road, Lower Hutt, opened in 1991. The McKenzie Education Centre is on the right.

Watercolour by Arthur Williment. Roy McKenzie, *Footprints*





old people who were dying. In typical fashion Roy visited Christchurch Hospital to ascertain for himself and indeed he found it depressing and 'if anything, more distressing'. In the same year, 1977, the McKenzie Education Foundation had sponsored a leader in music therapy from England, Maggie Pickett, who talked to Roy about the work she did at St Christopher's Hospice in South London, which was established by the founder of the modern hospice movement, Dr (later Dame) Cecily Saunders. On a trip to London later that year Roy spent a day at St Christopher's and by the end of it wrote 'my notebook was full and so was my mind.'¹⁰⁴ In typical gratitude he bought a piano for the hospice for Maggie Pickett to play when she returned to the United Kingdom.

On his return to Wellington, Roy wasted no time in addressing his Rotary club in November 1977 on the need to establish a hospice in New Zealand. 'The community's present attitude to fatal illness and death and help for the bereaved is itself the cause of considerable suffering. It is no wonder patients get the feeling "no one seemed to want to look at me." If better services are not provided the result will be more rejected people.' The Sisters of the Little Company of Mary did operate a ward for the terminally ill at Calvary Hospital in Wellington. In 1977, the J R McKenzie Trust provided a grant to assist in its refurbishment as part of \$15,000 set aside for facilities and education in terminal care that year, and from June 1979 this facility was taken over by the new Mary Potter Hospice.¹⁰⁵

On the occasion of the opening of the Te Omanga Hospice in 1991. From left: Glen Evans, Sir Roy McKenzie, Max and Marion Cooper, and Prime Minister Jim Bolger.
Roy McKenzie, Footprints

In Lower Hutt, Roy connected with nurse Marion Cooper and her husband Max, who had established the Community Domiciliary Nursing Trust in 1967 after Marion had cared for a nursing colleague dying of cancer. By early 1978, the Coopers had already completed a study on the establishment of a community-based hospice in Lower Hutt, but the hold-up was securing suitable premises. A public meeting was held in July and a fundraising committee established as the start of the Te Omanga Hospice Trust with Roy McKenzie as its founding chair. A restored colonial home at 1 Bloomfield Terrace in Woburn was secured with the Coopers mortgaging their home and the balance of \$20,000 being provided by Roy McKenzie with an interest-free loan. Te Omanga Hospice was opened on 6 September 1979 as the first community-based hospice in New Zealand. The J R McKenzie Trust had provided a grant and the opening was held in conjunction with a conference on cancer care funded by the McKenzie Education Centre. Roy and Shirley McKenzie provided a gift of \$30,000 to cover the first four months' salary of a medical doctor, and Te Omanga was fortunate to first garner the service of Dr Richard Turnbull and then to entice Dr Ivan

Te Omanga Hospice today.
Te Omanga Hospice



Lichter out of retirement. Dr Lichter became its medical director between 1986 and 1993. It was his research and teaching at Te Omanga that developed the hospice into an internationally recognised model of care, research and education. Most importantly, Dr Lichter improved standards of care for the terminally ill and changed public attitudes to death and dying. His services were recognised in 1997 when he was appointed to the Order of New Zealand. Shirley and Roy McKenzie supported his work by purchasing 4 Bloomfield Terrace in 1986 to be used as the McKenzie Education and Research Centre. This was the start of the hospice movement in New Zealand.

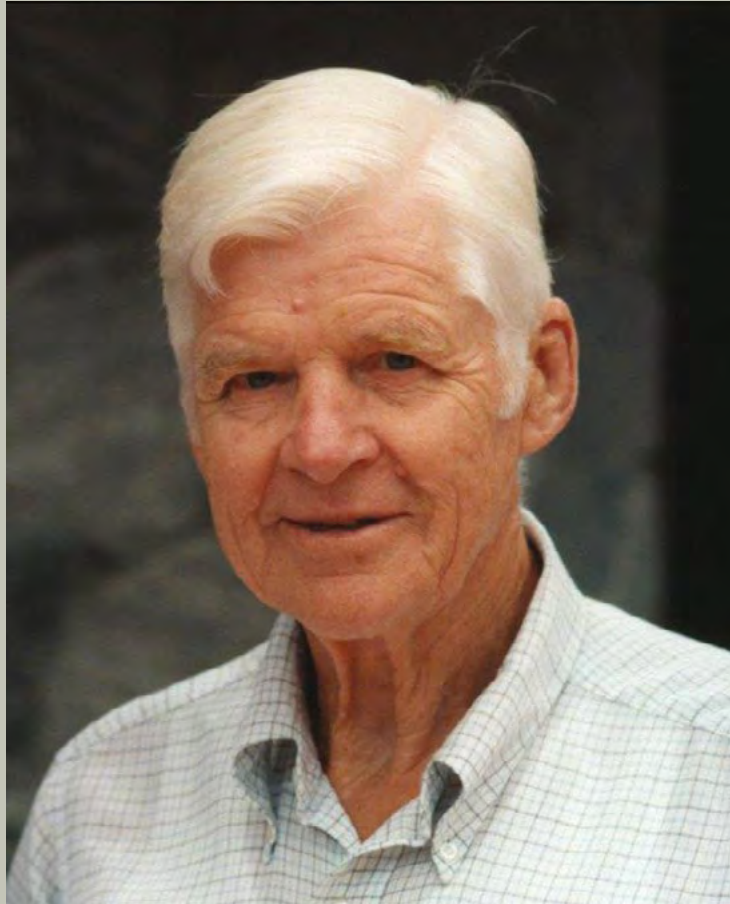
In 1991 the Te Omanga Hospice Trust purchased a larger home and grounds at 136 Woburn Road in Lower Hutt, and 25 years later, due to new building regulations following the Christchurch and Kaikōura earthquakes, demolished the existing buildings and replaced them with a new \$10 million purpose-built Te Omanga Hospice opened in 2019. The story of Te Omanga Hospice is very much that of many hands working together and of Roy McKenzie in his element of being a 'community volunteer' and hands-on to make 'a dream come true'.¹⁰⁶





**“Do not follow where the path
may lead. Go instead where there
is no path and leave a trail.”**





Chapter Three

Sir Roy McKenzie

Humanitarian, community volunteer,
a caring person

“Do not follow where the path may lead.
Go instead where there is no path and leave a trail.”

Anon. A favourite quote of Sir Roy McKenzie¹⁰⁷

The son of one of New Zealand’s most successful businessmen and greatest philanthropists, Roy McKenzie was not daunted to follow in his father’s footsteps, but in his own words got on with the task of ‘harnessing an inheritance into a legacy’.¹⁰⁸ A talented sportsman and successful businessman in his own right, he was equally a socially aware and compassionate man with a spirit of generosity. Sir Roy McKenzie paved his own path to shape philanthropy in New Zealand, giving away tens of millions of dollars in an unassuming manner. He preferred to walk together with the community he funded and to be known simply as a community volunteer.

Previous page:
Sir Roy McKenzie, c. 2000.

Young Roy on
his rocking horse.
J R McKenzie Trust



Early life

Born in Wellington on 7 November 1922, Roy Allan McKenzie was the second son of John McKenzie, the 46-year-old owner of a growing number of McKenzies fancy good stores, and Annie May (May) McKenzie (née Wrigley), who had been born in Sanson, near Palmerston North, in 1890. The family lived at Rāwhiti Terrace, Kelburn, before moving to Rona Bay, Eastbourne, in 1926, and Roy and his 15-month older brother, Don, attended Muritai School. In 1928, with John McKenzie now in his early 50s and contemplating semi-retirement, the family moved to Christchurch and a large homestead and land on Yaldhurst Road in Riccarton, where John established Roydon Lodge Stud (named after his two sons). The ‘old man’, as Roy often referred to his father, was an older parent and a product of the Victorian era. He was strict and somewhat stern with his sons, but Roy’s

brother 'being the oldest and more aggressive than I was, tended to be favoured.'¹⁰⁹ Their father, who Roy respected, did not want his sons to be spoilt (there is a story of cabbages for Christmas)¹¹⁰ and he instilled in them a strong work ethic. 'He always appreciated any achievement which came from work or dedication and he could be generous if you made a good case.'¹¹¹ Roy's lessons in mutual affection and closeness came from his mother.

Don and Roy went to Yaldhurst School and then boarded at the Cathedral Grammar School before transferring to board at Timaru Boys' High School after their father had been impressed during a visit. Both sons excelled at sports from an early age and played together in the school's first XV rugby, while Roy beat his older brother in the school's senior tennis final. 'I am a competitive person. I love to win. Having an older brother, I always aimed at being up with him, and, fortunately, I was.'¹¹² Roy was a champion swimmer and a fine athlete with

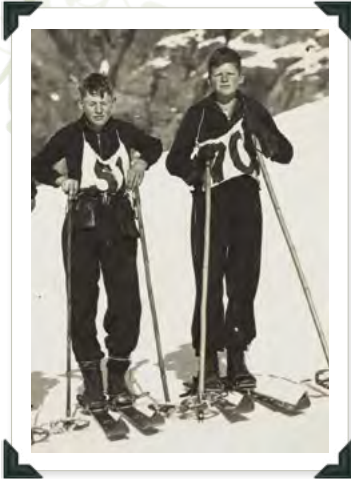


J R McKenzie at home with sons, Don and Roy, c. 1928.
Alexander Turnbull Library



Timaru Boys' High School First XV in 1939: Roy (back row, right) with brother Don (second row, third from right).

J R McKenzie Trust



Roy (right) and Don McKenzie, on a cross-country ski, 1937. Alexander Turnbull Library



Roy McKenzie after graduating with his airforce wings. Alexander Turnbull Library

his school triple jump record set in 1940 not being broken until 1985. It was at school too, and in the holidays, that the McKenzie boys enjoyed the outdoor pursuits around Mt Cook, which sparked in Roy a lifelong love of tramping and climbing, but particularly skiing.¹¹³

In 1941, Roy entered the University of Otago to study accountancy at Knox College and he played rugby for the College and University A team.¹¹⁴ The Second World War would interrupt his studies and change his life.

War service

Don McKenzie enlisted in the Royal New Zealand Air Force in 1941 and was training to be a pilot when he was tragically lost at sea on a training mission near Lake Grassmere on 21 January 1942, aged 20. For Roy, apart from the intense grief and loss, it was a life-changing event in that he now became the successor to his father's business and philanthropic interests. First, however, there was a call-up to serve his country. After a deferral to sit university exams in November 1942, Roy entered Burnham Camp and was posted to the Army Service Corps, but soon after, like his brother, and much to his mother's natural concerns, he transferred to the Royal New Zealand Air Force. He initially trained in New Zealand to be a pilot, but failed the eye test and so trained as a bomb aimer at Leighton in Alberta, Canada, and topped this course and the navigational course at Edmonton as part of the British Empire Air Training scheme.¹¹⁵ After further training in Wales and England, Roy was posted to 103 Squadron in April 1944 and joined a Lancaster Bomber crew at the end of the Bomber Command campaign over Europe that for him included a near downing due to ice on the wings and a diversionary flight over Norway on the eve of the D-Day invasion at Normandy on 6 June 1944. After victory in Europe in May 1945 he undertook flights over Europe to ascertain the damage and repatriate prisoners of war from Italy.¹¹⁶

The bonds of wartime comradeship lasted for the rest of his life. Roy hosted a reunion of his bomb aimer course at the James Cook Hotel in 1983 and attended other reunions. When his Lancaster crew's engineer,

Scotsman Jock Todd, whose skills he credited with surviving the war, migrated with his family to New Zealand and fell on hard times, he helped him purchase the Arthurs Point Hotel near Queenstown as a silent partner, and later helped his widow open Glen Roydon Lodge in Glenorchy.¹¹⁷ Roy McKenzie was an intensely loyal person and highly valued trust in others.

Post-war and family life

Roy was home in Christchurch by Christmas 1945. He soon shifted to Wellington to work at Harry Nankervis' accounting firm (the accountants used by McKenzies (NZ) Ltd), while finishing his accountancy studies at Victoria University College, which he finally passed in 1948. Around this time, and in preparation for his future at McKenzies Ltd, he had already gone overseas to work at the large United Kingdom department store chain Marks and Spencer and with the McKenzies' buying firm J Raymond Wilson Ltd.¹¹⁸

On the voyage to Britain he met Shirley Howard, also born in 1922, and they were married in Bournemouth on New Year's Day 1949. They returned to Wellington and eventually settled at Lowry Bay. They soon started a family: Peter (born 1952), John (1954) and Robyn (1955). Family life was centred around sports and outdoor pursuits, tennis and tramping, summers at the holiday bach in Queen Charlotte Sound in the Marlborough Sounds, and skiing holidays in the winter. The children witnessed and experienced first hand the compassion and community involvement of their parents, whether it was Roy bringing a child home to teach him to play tennis to stay fit, or taking Birthright families on holidays in

Roy McKenzie and Shirley Howard aboard *Port Hobart*, en route to Britain in 1948.

J R McKenzie Trust





Robyn, John and
Peter McKenzie in 1967.
J R McKenzie Trust

the Sounds, or Deaf children on day trips or skiing holidays. In all of this activity over 65 years, Roy was wholeheartedly supported by his wife Shirley, who was affectionately viewed as ‘the rock’ by her children and grandchildren.¹¹⁹ She was very much an active partner in his life of giving, besides her own considerable community work.

A sporting life

After the war, Roy won New Zealand titles in skiing, and although an injury prevented his own participation, he was made captain of New Zealand’s first ski team to compete in a Winter Olympics, at Oslo in 1952. Roy had a passion for photography and film, and used his films of the Oslo Olympics to raise money at ski club functions to fund the first of 300 McKenzie ski scholarships over 25 years to support the next generation of skiers. With other keen businessmen, he founded the Ruapehu Alpine Lifts and built the Skyline Ski Club hut on Ruapehu. Ruapehu almost claimed his life when he had a dramatic fall at a spot now known as McKenzie’s Mistake. Unperturbed, Roy skied all his life and was a New Zealand Ski Masters champion.¹²⁰



Roy McKenzie at Coronet Peak in 1947 after winning the South Island and University combined titles.

Skiing medals and Olympics emblem.

Background: Remarkable Skifield
J R McKenzie Trust



In 1948 Roy had summited the Matterhorn in Switzerland. ‘I wasn’t a mountaineer and I thought, “Well, this is a real life challenge. If I can do this it’ll stand me in good stead.” And I’d have to say it’s probably one of the biggest challenges I’ve completed in my life.’¹²¹ It speaks to the courage and determination that Roy McKenzie manifested in all facets of his life.

It was this love of adventure that saw him jump at the invitation from the Governor-General Lord Cobham, with a handful of other businessmen, to establish Outward Bound in New Zealand in the early 1960s. He negotiated the purchase of the former guest house at Anakiwa at the head of Queen Charlotte Sound, and the neighbouring 22 acres that became known as McKenzie Field were purchased by the J R McKenzie Trust and presented to the Cobham Outward Bound School that opened in 1962.¹²² Roy McKenzie, who later became president, patron and emeritus patron, funded hundreds through the programme, including his own sons, and transferred 150,000 Rangatira Ltd shares to ensure the Outward Bound Trust could offer the experience to others who would not otherwise have the opportunity. He



Sir Edmund Hillary supporting his friend Sir Roy McKenzie at the book launch of *Footprints* in 1998.

J R McKenzie Trust

rated Outward Bound as the best of all the things he had supported for its investment in young people. 'There is little to equal the thrill of seeing young people develop and realise their potential in life.'¹²³

With a passion for the outdoors and tramping in the national parks, Roy served as a member on the National Parks Centennial Commission from 1983 to 1988.¹²⁴ In 1994, aged 72 and less than a year after his first major prostate operation, Roy undertook a month-long, 400-kilometre trek through Nepal that was physically 'a real hard slog', but he kept in mind his friend Sir Edmund Hillary's advice, 'It's ourselves we conquer, not the mountains.'¹²⁵ To keep fit, Roy also played squash and competed in tennis into his eighties.

Roydon Lodge Stud

Another lifelong passion, and one he carried on from his father, was harness racing and horse breeding. He had got a love for horses when working at Roydon Lodge during leave from military training in 1942. After the war Roy opened stables and a training centre in Upper Hutt. He was still a young man in his early 30s when he took over as managing director of Roydon Lodge Stud on the death of his father in 1955.

Roydon Lodge Stud is synonymous with the development of the harness racing industry. It was established as a standardbred nursery in 1928. During Roy's time it expanded to a larger site at Templeton, and in 1970 was the longest running and most successful standardbred stud.

Roy's racing stick and colours, and The Roydon Heritage: 50 years of Breeding and Harness Racing (1978).

J R McKenzie Trust



It bred many famous horses — Light Brigade, U Scott, Roydon Glen, Roydon Scott, Scottish Command, Ardon and Sundon, to name but a few — won Dominion and Inter Dominion championships, and set world records. Roy McKenzie was the top owner for several years. He was also a fearless driver during four decades, and one of his most thrilling moments in harness racing was driving Arania Scott, trained by his son-in-law Keith Gibson, to a win at the Hutt Park Raceway on 3 December 1979. He was driving and winning right up to his compulsory retirement at 65 in 1987. As in everything he did, Roy generously support the harness racing industry in many ways, including one time gifting his race winnings to glass-in the public stand at the Hutt Park Raceway.¹²⁶ In 2001, Sir Roy handed over management to Keith Gibson.

Roy McKenzie after a win driving the Keith Gibson-trained Arania Scott at Hutt Park Raceway on 3 December 1979.

J R McKenzie Trust



Taking care of business

The 'old man' had ensured that Roy McKenzie grew up knowing the value of hard work.

Roy joined McKenzies Ltd department stores in 1949. He had worked in the stores during his secondary school holidays, and would quip that like New Zealand's ubiquitous Edmonds baking powder, 'I was sure to rise!'¹²⁷ It was the start of a period of growth for McKenzies stores into new towns and the new post-war suburbs, and Roy cut his teeth opening a store in Kaitaia in 1950. He was made executive director of McKenzies (NZ) Ltd in 1952 and by the time he stepped down the company had grown to 70 stores and 1800 staff from Kaitaia to Invercargill by 1970. He remained on the board until its takeover by LD Nathan in 1980.¹²⁸

Roy McKenzie was a director of Rangatira Ltd from 1944 to 1993 and its chair between 1968 and 1985 during an expansive phase of

Rangatira Ltd board of directors in 1990. **Seated:** Sir Roy McKenzie, Sir Roderick Weir, James Steele (chair) and Robert Steele. **Standing:** Alexander Paterson, Peter Meikle, Keith Gibson, Ian McKegg (general manager), Robert Vance and Norman Geary.

Roy McKenzie, Footprints



investment.¹²⁹ From 1977 to 1997 Rangatira's annual dividends increased from \$400,000 to \$3.5 million.¹³⁰ During 49 years as a director, Roy continuously emphasised the needs of charitable shareholders and gifted Rangatira shares to over 20 charitable trusts.¹³¹ He was chair when the board unanimously agreed to the takeover of McKenzies (NZ) Ltd by L D Nathan as it was a good offer for the shareholders and McKenzie charitable interests, but 'If my old man had been there he would have shot me!'¹³² Sir John McKenzie had envisaged Rangatira Ltd supporting new companies and economic development in New Zealand, and during Sir Roy's time this continued with support for companies at the early stage of their histories that would become iconic names in New Zealand. The development of the James Cook Hotel in Wellington in the early 1970s, for example, provided a significant economic contribution, not only to the city but also as a boost to the tourism industry in New Zealand.¹³³

Like his father, Roy McKenzie was a successful businessman and loyal to his staff, including a number of personal secretaries and the wider staff at McKenzies (NZ) Ltd and the James Cook Hotel, among many other business interests during his lifetime.

A typical McKenzies department store, New Brighton, 1962.
J R McKenzie Trust



Roy the Rotarian

Roy, as he was known at Rotary, continued the McKenzie family Rotary tradition of 'Service Above Self' that he first experienced as a schoolboy attending the annual 'father and son' days at the Rotary Club of Christchurch, and the Rotary Gala Days at Roydon Lodge, during the 1930s. When he joined his father's original club, the Rotary Club of Wellington, in 1954, he was one of the club's youngest members, and would become one of its most prominent during the next half century.

Soon after joining Rotary, as a new parent Roy was selected by the club to go on the committee of the fledging Wellington branch of Birthright that worked for families with only one parent. 'The experience in turn taught me how first-hand knowledge of an organisation's work could help the case for more generous support from trustees of the J R McKenzie Trust.'¹³⁴ It would be a lifelong lesson that he would bring to his many other giving initiatives. Roy became a council member of Birthright NZ and later, together with Shirley, joint patrons.

Roy McKenzie was club president in 1967–68, and his theme of Civic Pride included planting Lambton Quay in one of the first significant greening projects in Wellington. Tree planting continues to be a major focus for Wellington Rotarians today. 'I genuinely believe,' he recalled in 1971, 'that my appointment to the Presidency of the Rotary Club of Wellington was, above anything else I might have accomplished, the thing that would have had my father jumping for joy.'¹³⁵ Apart from numerous Paul Harris Fellow Awards, Sir Roy was awarded the Rotary International Service Above Self Award in 1996.¹³⁶

Wellington was far from your typical Rotary club, with its membership including captains of industry, public service leaders, and leaders in the arts, medicine and the sciences. It also had a number of the country's leading philanthropists. In fact, Roy McKenzie would discuss various grant-making activities over lunch at Rotary with

Sir Roy McKenzie was awarded a Paul Harris Fellow in 2005 by the Rotary Club of Wellington for his 50 years of service as a Rotarian.

J R McKenzie Trust



Sir John Ilott and later his son Jack Ilott (John Ilott Charitable Trust), John Sutherland (Sutherland Self Help Trust) and Sir John Todd (of the Todd Foundation).¹³⁷

A life of giving

'Father's greatest legacy to me was an involvement as a Trustee of the J R McKenzie Trust at an early age.'¹³⁸ On his return from the United Kingdom, Roy joined the J R McKenzie Trust in 1949 as a personal trustee; he was in his late 20s, and his youthfulness stands out in the post-war board photographs. By the time he took over as its chair in 1971 he was well-versed in its ways and the good it had achieved, but also its limitations. Roy did not see himself as a philanthropist, with its characterisation of simply writing out cheques, instead he preferred to get out in the community and see where the money could do the most good, and as chair he would bring this philosophy to his father's 'Big Trust'. From the 1980s, he championed the appointment of co-opted trustees to bring women and Māori, and generally younger people on board, to challenge

Roy McKenzie chaired the J R McKenzie Trust from 1971 to 1987, seen here with the board in 1985. **Seated:** Sandy Macalister, Diana Crossan, Roy McKenzie (chair), Neil McKay (secretary) and David Ellis. **Standing:** David Hurley, Ken Winter, Wayne Nyberg, Doug Graham, Brian Burmester, Fred Burns, Margaret Lythgoe, Ton Haak, Colin East, John McKenzie, Graham Bishop, Trevor Gebbie and Dr Jack Mann.

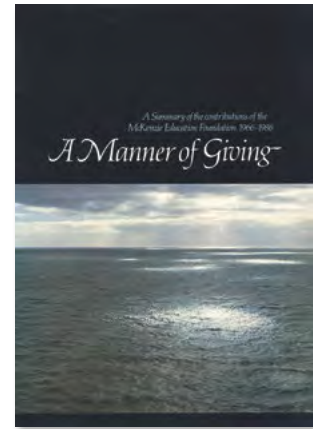
J R McKenzie Trust



the thinking of his fellow upper middle class, middle-aged, all-male and all-white members. Roy McKenzie was also outspoken on social issues and spoke up on behalf of those without a voice. In 1979, for example, foreseeing the challenges ahead for families and society in the next decade, he used his voice as chair of the Trust to call on the government to establish a children's commission as a fitting outcome for the Year of the Child — a decade before the Office of the Children's Commissioner was established in 1989.¹³⁹ By the time he stepped down as chair in 1987 the J R McKenzie Trust was on a new path. When Sir Roy retired as a trustee in 1993 his children were now serving on the Trust board.

In 1966, middle-aged and after almost 20 years serving as a trustee of both the J R McKenzie Trust and the J R McKenzie Youth Education Fund, Roy McKenzie established the first of his lifetime's two personal foundations, the McKenzie Education Foundation. Roy established the foundation with \$500,000 worth of Rangatira Ltd shares inherited prior to his 21st birthday, and ran it quite differently from his father's earlier education trust: it had a greater ability to co-opt people as trustees who were involved in social issues, the capital plus income was to be expended over a finite 20 years, and Roy was keen for the trustees to identify and develop their own projects as they saw the need. Finally, his aim was to attack the causes of social problems rather than alleviate their symptoms. Some of the achievements included a centre to improve university teaching at Victoria University in Wellington, the McKenzie Music Therapy Centre for children with hearing difficulties in Auckland, and the McKenzie Residential School for children with learning difficulties in the South Island, which operated in the former McKenzie family homestead in Christchurch between 1971 and 2011. A similar McKenzie Centre for Children with Special Needs was opened at Hamilton in 1984. By 1986, \$2 million had been expended and the residue of the funds went towards establishing Roy's second and even more ambitious foundation.¹⁴⁰

The Roy McKenzie Foundation was established in 1986 with \$5 million from the residue of the earlier foundation and the sale of \$3 million of personal shares in the James Cook Hotel, money that was to be spent within



Cover of *A Manner of Giving* (1987).
J R McKenzie Trust

8 years in keeping with Roy McKenzie's philosophy of distributing wealth to the generation that had raised it. A small group of trustees, including Roy's daughter Robyn Gibson and daughter-in-law Ruth McKenzie, made decisions on grants and acted as his close advisers on a range of issues. The projects the Foundation funded were all seen to be groundbreaking, addressing the needs of groups in the community that had the least access to resources, or promoting innovative projects that could be seen to benefit the community as a whole. These included the first community hospice in New Zealand, Te Omanga Hospice in Lower Hutt; support for Women's Refuge, Rape Crisis and Men for Non-violence at a time when

'You can get so much joy out of giving while you're living. Half a life making money, the other half giving it away — how lucky can you be?'

domestic and sexual violence was little understood; and the establishment of two bodies to grow philanthropy, today known as Philanthropy New Zealand and Generosity New Zealand. The Foundation's largest and most ambitious initiative was five years in the making and involved a \$1.5 million seeding commitment towards New Zealand's first purpose-built children's museum: Capital Discovery Place in Wellington (today known as Capital E). By the time the Roy McKenzie Foundation was wrapped up in 1994 it had made 1700 grants totalling \$8 million to projects that were independent and innovative. Its story is well-documented in the publication *Creative Giving* and the Foundation was the culmination of Sir Roy's philosophy of giving: his preference for innovative approaches to addressing social problems rather than those trying to alleviate their symptoms, his endless encouragement to a culture of giving in Aotearoa New Zealand and sharing with others that the reward of giving is to 'die poorer, but be richer in spirit'.¹⁴¹ Jenny Gill, the Foundation's executive officer, observed, 'The struggles faced by children with dyslexia, the discrimination facing the deaf, the blind eye turned to domestic violence and the abuse of children — none of these was part of Roy's personal experience, but each of these issues and many more have received his attention, his lobbying, and a passionate determination to make the world a better place.'¹⁴²

During his lifetime Roy McKenzie provided active and hands-on support at the fledgling stages of many charitable organisations, including Birthright New Zealand (as a council member and patron), the New Zealand Outward Bound Trust (president, patron and emeritus patron), Te Omanga Hospice Trust (chair and patron), the National Foundation for the Deaf Inc. (founder, chair and vice patron), New Zealand Society for Music Therapy Inc. (life member and patron), NZ Council for Educational Research (member and treasurer), Ngā Manu Trust (trustee), SPELD NZ (life member and patron) and the National Collective of Independent Women's Refuges Inc. (patron).

It has been estimated that Sir Roy McKenzie's total giving, through the J R McKenzie Trust, his own foundations and considerable 'chequebook philanthropy', amounted to upwards of \$100 million. He has been called the most influential philanthropist in this nation's history, but he never warmed to the label 'philanthropist': 'I like to think of myself as more of a community volunteer.'¹⁴³ Sir Roy is certainly as much remembered



Sir Roy McKenzie, 2007.
J R McKenzie Trust

for his personal warmth and involvement — his handwritten notes of encouragement, personal advice to developing organisations, mentoring talented individuals, advocacy with those in power, and his sheer inspiration and generosity of spirit. He acknowledged the personal rewards he gained from his community volunteering. 'You can get so much joy out of giving while you're living. Half a life making money, the other half giving it away — how lucky can you be?'¹⁴⁴

A legacy



Caricature of Sir Roy McKenzie
by Murray Webb, 27 July 2005.
Alexander Turnbull Library

New Year's Day 1989 was a red letter day for the McKenzie family with Roy and Shirley's 40th wedding anniversary, but also with the breaking news that Roy McKenzie had been made a Knight Companion for services to education and community work.¹⁴⁵ Six years later, on 17 June 1995, Sir Roy was appointed to the Order of New Zealand, the nation's highest honour, in recognition of outstanding service to the Crown and the people of New Zealand, and limited to 20 living persons at any one time. Sir Roy's investiture was conducted by Her Majesty Queen Elizabeth II at Government House in November 1995. There were other educational and civic honours: Honorary Doctorates in Literature (Massey) in 1992 and Commerce (Victoria) in 2004, and he was named Wellingtonian of the Year in 2004.

On 7 May 2007 a symposium, organised by Victoria University of Wellington and Rotary Club of Wellington, honoured Sir Roy McKenzie,

His Excellency Sir Paul Reeves, Governor-General of New Zealand, invests Sir Roy McKenzie as a Knight Commander of the Order of the British Empire at Government House, Wellington on 17 May 1989.

J R McKenzie Trust





2004 Wellingtonian of the Year

Community Service Category Winner

Sir Roy McKenzie



The heir to the McKenzie retail empire, Sir Roy has given away more money than most people will ever earn.

The causes he has supported include establishing Te Omanga hospice, the first women's refuge, and several schools for disadvantaged children.

He donated the land on which Outward Bound sits and is renowned for his generosity and willingness to work for people in need.

A man whose name is synonymous with kindness is the 2004 Wellingtonian of the Year.

Sir Roy McKenzie is a Lowry Bay businessman whose generosity has touched thousands of lives nationwide – and who famously once wrote out a cheque for \$5000 when asked by Women's Refuge to donate \$500.

Bounding on to the Te Papa stage like a man half his age, Sir Roy, 82, was obviously humbled by the honour at a ceremony last night. "It's unbelievable. There's so many good, dedicated people here, though guess I have an advantage over the others. I've been here a lot longer."

Knighted for services to the community in 1988, Sir Roy is known for his "hands-on" approach to philanthropy, a characteristic inherited from his father, the late Sir John McKenzie who established the original J R McKenzie Trust in 1940.

Sir Roy has been closely involved with the Outward Bound, Te Omanga Hospice, Birthright, Nga Manu Nature Reserve and the Victoria University Centre for the Study of Families and has also established several schools for disadvantaged children. His generosity over the years is estimated at close to \$100 million.



Sir Roy McKenzie was named Wellingtonian of the Year in 2004.

J R McKenzie Trust



Roy McKenzie, *Footprints* (1998).
J R McKenzie Trust

now gravely ill with cancer. Hundreds of people attended from the organisations Sir Roy had worked alongside for decades and their contributions and tributes were published in *Shaping the Future*.¹⁴⁶ Earlier in 1998, Sir Roy had published his memoir *Footprints: Harnessing an Inheritance into a Legacy*, and 20 years earlier had written a history of the Roydon Lodge Stud.¹⁴⁷ A documentary on his life and philanthropy, *Giving It All Away*, was produced in 2003.¹⁴⁸

Sir Roy died on 1 September 2007, aged 84. He was survived by his widow, Lady Shirley (who died in 2012), his children Peter McKenzie (who died in 2012), John McKenzie and Robyn Gibson, nine grandchildren and great grandchildren. He also left an extraordinary contribution to the McKenzie legacy of giving. His memory is treasured by the J R McKenzie Trust that consciously continues to honour his spirit of blazing a trail.¹⁴⁹ Just weeks before his death, Sir Roy was profiled in the *Listener* that concluded with asking him how he would like to be remembered, and his reply, 'A humanitarian, I suppose, would cover it, or a community volunteer. A caring person — how about that?'¹⁵⁰



Roy and Shirley McKenzie celebrating their 40th wedding anniversary and the announcement of Roy's knighthood on New Year's Day 1989.

J R McKenzie Trust

The Roy McKenzie Centre for the Study of Families and Children

The Roy McKenzie Centre for the Study of Families was launched in 2003 with the help of a personal donation from Sir Roy and Lady Shirley McKenzie. The Centre is named in honour of Roy McKenzie, in recognition of his generous support for New Zealand families over his lifetime.

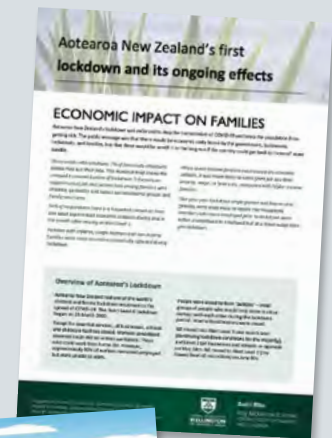
From the beginning, the Centre focused on family structure and relationships and the role of government in family formation and stability. It has produced landmark studies that have advanced understanding of the impact that separation has on children, parenting and family resilience in stepfamilies, family diversity and wellbeing. Dr Jan Pryor was the inaugural director, followed by Professor Paul Jose, both from the School of Psychology at Victoria University of Wellington.

In 2019, spearheaded by former chief district judge Sir David Carruthers, the Centre found a new home in the School of Business and Government at Victoria University of Wellington. The Centre was renamed to include the word 'children' and also given a Māori name, Awhi Rito, that describes the leaves that embrace the central shoot of the harakeke (flax) that for Māori represents family — the centre shoot is the child, surrounded and protected by awhi rito (parents) and the outermost leaves represent grandparents and ancestors.

Dr Kate Prickett is the current director. As a family sociologist and demographer, Dr Prickett has been researching the connection between family contexts and children's health and wellbeing. Her research looks at how family wellbeing and child development are affected by the institutions that families interact with — including those related to work and childcare — and by social factors such as socio-economic status, gender, and ethnicity.¹⁵¹

The Roy McKenzie Centre is a fitting legacy of Sir Roy and Lady Shirley's deep concerns and support for the institution of the family, and its impact on the development and wellbeing of children.

The Roy McKenzie Centre is a fitting legacy of Sir Roy and Lady Shirley's deep concerns and support for the institution of the family on the development and wellbeing of children.



The Roy McKenzie Centre for the Study of Families

1910

1930



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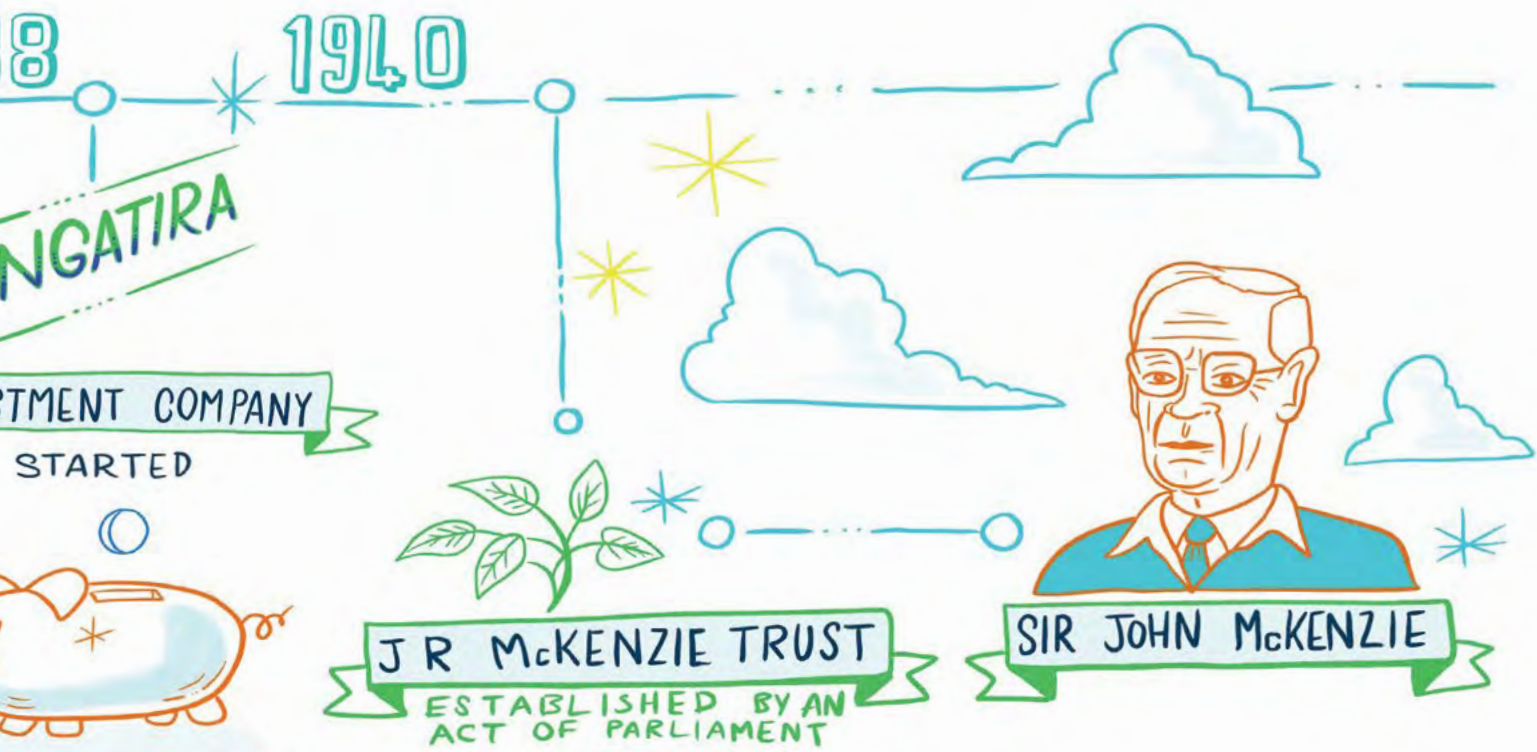


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J R McKenzie Trust
 timeline 1940-2020



1947 1954 1970

1977



SIR ROY MCKENZIE

CHARISMATIC
INFLUENTIAL



1 BOARD MEETING PER YEAR
HAS INCREASED SINCE THEN

MORE TRUSTEES ADDED BY SIR ROY
OVER TIME, INCLUDING THIRD
GENERATION FAMILY AND WOMEN

HE ALSO RECRUITED
'INDEPENDENT' TRUSTEES
AND REGIONAL COMMITTEES
OF ROTARIANS



1987

1997



NEW PURPOSE
QUALITY OF
LIFE



INNOVATIVE
FUND
ALLOWS US TO THINK
DIFFERENTLY

MAIL
SYSTEM
LARGE BOXES
OF
APPLICATIONS



**MULTI YEAR
GRANTS STARTED**



1 FTE

+

0.6 FTE



OCCASIONAL + NOW REGULAR USE OF CONTRACTORS

2001

2002

2003

REVIEW OF DEED
APPROVED BY
HIGH COURT



FIRST 5 YEAR
REVIEW
SIGNIFICANT
CHANGES

ESTABLISHED THE CURRENT MIX OF APPOINTMENT
PROCESSES FOR TRUSTEES, ROTARY, FAMILY, INDEPENDENT,
NZMA + NZLS

INCREASED FOCUS
ON MĀORI

MULTI YEAR GRANTS
INCREASE



2001 - 5

REFUGEE EMPLOYMENT
PROGRAMME

TE K

2005

2007



SINCE THEN, USE HAS BEEN MADE OF THE PROVISION TO MAKE 'REGULATIONS' REQUIRING 75% AGREEMENT BY TRUSTEES (WE CALL THEM OPERATING RULES)



JOHN MCKENZIE

PROACTIVE INITIATIVE - OUR FIRST SIGNIFICANT VENTURE INTO SYSTEM CHANGE



US

S

ĀWAI TORO



MĀORI DEVELOPMENT



2 FTE

+ 0.6 FTE

2008

2009

2010

2011

2012



SECOND 5 YEAR REVIEW

NEW

SOCIAL JUSTICE + INCLUSION PURPOSE



MAJOR CHANGES
 2 STEP PROCESS
 PANELS, LARGER
 FEWER GRANTS
 MOSTLY
 MULTI YEAR



MOVE TO ELECTRONIC FILES 2010

SMARTYGRANTS

MORE DIVERSE BOARD

CONNECTING EDUCATION & COMMUNITIES



VOLUNTEER MIX CHANGED TO SUIT
 NEW PROCESS, FEWER PEOPLE
 REQUIRED, DIFFERENT SKILLS + KNOWLEDGE,
 RECRUITMENT OF MAORI

2014. 2017. 2018. 2019 Today **FUTURE**



5 YEAR MOSTLY MINOR CHANGES REVIEW

FOURTH 5 YEAR REVIEW

ADVANCING EQUITY



PETER MCKENZIE

2018 OPC

PETER MCKENZIE PROJECT

STILL 13 TRUSTEES INCLUDING 2 FROM 4th GENERATION FAMILY

ALSO OCCASIONAL USE OF CONTRACTORS

3 FTE

4 FTE

3.8 FTE

+0.6 FTE

+1 ADMIN

+1 ADMIN



**“In 1982 when I joined the board ...
community trusts, energy trusts and
gaming trusts did not exist.
The J R McKenzie Trust was a
relatively large funder.”**





Chapter Four

Intergenerational giving

1980–2000

“Trusts and Foundations convert private wealth to public purpose.”

Sir Roy McKenzie, Footprints (1998)¹⁵²

“In 1982 when I joined the board ... There was much less funding available from independent funding organisations. Community trusts, energy trusts and gaming trusts did not exist. The J R McKenzie Trust was a relatively large funder.”

John McKenzie, 2010¹⁵³

The 1980s was a time of change in society as the Second World War generation retired and the post-war baby-boom generation moved into positions of power and responsibility. So it was with the J R McKenzie Trust: Roy McKenzie retired from the Trust, but not from giving, starting a new namesake foundation and the culmination of his lifetime of giving, while the third generation of the McKenzie family came on board. The advent of co-opted trustees also reflected the widespread entry of women into public life and the Māori renaissance of the 1980s as the Trust looked to connect with new community organisations and break the mould of a middle-aged, middle-class charitable institution. The Trust celebrated 50 years in 1990. In the decade that followed it was still meeting traditional needs as the economic recession and government retrenchment placed a strain on communities and the social services sector, but under its first woman chair and a new structure the Trust shifted its sights at the dawn of the new millennium and a new age of giving in Aotearoa.

Generations

The 1980s generational change was most visible in the shift of political power from the war generation to the post-war baby-boom generation. The 1984 general election saw the defeat of 62-year-old Sir Robert Muldoon and his fellow old soldiers to 41-year-old David Lange and the youngest Cabinet in over a century. The most influential of the group was accountant Roger Douglas, who as minister of finance commenced a radical programme of market liberalisation dubbed ‘Rogernomics’ that swept away a highly regulated and high-subsidy economy, and

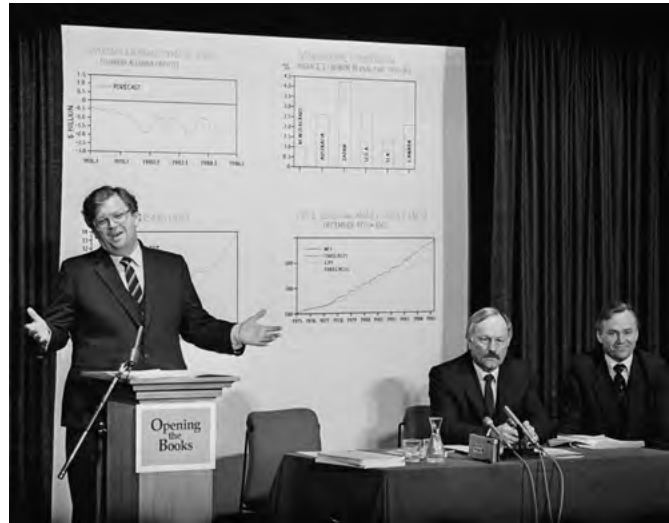
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John, Sir Roy and Peter
McKenzie, c. 2000
J R McKenzie Trust

introduced tax cuts and a goods and services tax (GST).¹⁵⁴ The economic reforms began to transform the New Zealand economy and society during the late 1980s — an era of high-rise mirror-glassed skyscrapers, the rise and rise of the sharemarket on the back of ‘mum and dad investors’ and general consumerism, as epitomised in the popular television series of the time, *Gloss*.

Unskilled and semi-skilled workers in the cities were the first hit by the economic reforms. Rural and small-town New Zealand was suffering disruption too, and as farmers came off high subsidies and onto high mortgages, some came ‘off the land’. In the Hawke’s Bay, East Coast and central North Island, whole industries, such as forestry and the freezing works, shut down, forcing people to move elsewhere. When share values dropped by \$5.7 billion (\$12 billion in 2020 money) in a single day in October 1987, and halved over the next 10 months, urban white-collar workers were no longer immune; private companies consolidated, closed or moved offshore and the public service retrenched as part of a wider recession.¹⁵⁵ Many Kiwi took flight overseas as unemployment rose. From the late 1980s, as the philosophy of self-reliance replaced a half-century tradition of state support, many community groups lost their government funding.

There were also other social forces at play. Work patterns were changing with the introduction of Saturday trading in 1980 and Sunday trading in 1990, and school children stopped coming home for lunch as mothers entered the workforce. Education was set to change with the introduction of Tomorrow’s Schools in 1989, and the health system began a decade of disruption. During these years the Treaty of Waitangi became accepted as the constitutional cornerstone of New Zealand as a bicultural society, creating a challenge to Pākehā to work towards new understandings of partnership, but also providing a different challenge to Māori as tangata whenua to claim their rightful place in Aotearoa. At the J R McKenzie Trust, these wider societal changes were felt as the third generation of the McKenzie family came on board.



Prime Minister David Lange, Finance Minister Roger Douglas and Associate Finance Minister Richard Prebble at the ‘Opening the Books’ presentation on 30 August 1984.

Alexander Turnbull Library

The third McKenzie generation

In 1982, the retirement of Roy McKenzie's cousin, personal trustee W (Bill) Gee Taylor, opened the way for the third generation of the McKenzie family with John McKenzie, Roy's second eldest, taking a seat on the board of the Trust.¹⁵⁶ 28 years later in 2010, and on his retirement from the Trust and as its chair from 2005 to 2010, John McKenzie recalled, 'The Trust did little other than process grant applications. We had one funding round per year, culminating in a full-day endurance test at which Board members (all white, all male) went through hundreds of grant applications, which had already been vetted by Rotary volunteers. That was our annual meeting.'¹⁵⁷ John would be joined by his elder brother, Peter McKenzie, in 1992. Peter's wife, Ruth McKenzie, would be a trustee and chair of the Roy McKenzie Foundation, while Roy's daughter, Robyn Gibson, would be a trustee on the Foundation and a personal trustee on the J R McKenzie Trust. Roy and Shirley McKenzie's children were part of the post-war generation and brought their own independent views to the Trust. At his first distribution meeting on 5 November 1982 (Guy Fawkes Day), John McKenzie 'lit a firework' at the old board table when he questioned 'the appropriateness in today's environment of the Board encouraging boxing and allied activities.'¹⁵⁸ It was the start of decades of active and robust involvement by the third generation of J R McKenzie's family.

J R McKenzie Trust board and staff, 1990. **Seated:** John McKenzie, Jenny Gill, David Hurley (chair), Roy McKenzie (chair), Lesley Carmichael (secretary) and Doug Brown. **Standing:** Maureen Ramsey, Peter Roselli, Bryan Ross, Wayne Nyberg, George Twentyman, Ton Haak, Des Price, Stuart Batty, Bob Jollands, Keith Stevenson, Stuart Melville, Bruce Morrison and John Watson. (Absent: Diana Crossan.)

J R McKenzie Trust



The Trust substantially increased the amount it distributed during the decade. In 1980, it provided \$540,000 in grants, an increase of \$200,000 due in part to the sale of McKenzies (NZ) Ltd that year. Five years later it had increased to \$1.5 million and to 500 projects and organisations.¹⁵⁹ This was all possible due to the excellent results by Rangatira Ltd during the economic boom of the mid-1980s, and it even managed to keep its capital intact in spite of the collapse of the share market in 1987. It was needed as the J R McKenzie Trust continued to support the J R McKenzie Youth Education Fund, Plunket, Heritage, and Birthright, and myriad national organisations and local community groups. The Trust also funded new areas of interest. During the decade it devoted much time and funds on the previously silent affliction of domestic violence and child abuse, which revealed it did not shy away from difficult social issues.

The generational changeover was complete when in 1987, at the age of 65 years, Roy McKenzie stepped down from the chair of the J R McKenzie Trust and Rangatira Ltd (he would remain on the board of both until 1993) to concentrate on the Roy McKenzie Foundation, established in 1986. His successor at the Trust was a 45-year-old lawyer, David Hurley, who had joined the Trust as the Law Society's representative in 1980 and had previously worked alongside Roy McKenzie at Outward Bound. He brought his legal mind and significant people and negotiation skills (he would later have a distinguished career as a mediator), combined with a concern for the community and social justice to the role of chair.¹⁶⁰

In 1988, the J R McKenzie Trust, with all the other McKenzie trusts, adopted a code of practice based on the ten principles underlying sound philanthropic practice that had been adopted at the First World Congress of Philanthropy at Toronto that year. Basil Potter, on behalf of the Roy McKenzie Foundation, had been the only New Zealander among the 400 delegates.¹⁶¹



J R McKenzie Trust

TEN PRINCIPLES UNDERLYING SOUND PHILANTHROPIC PRACTICE

- 1** To support poor and disadvantaged people on their struggle to meet their needs, uphold their rights and to build on their strengths, and that priority be given to their interests.
- 2** To assist people to gain access to the information, education, skills and resources that will empower and enable them to achieve self-sufficiency.
- 3** To support justice and equity in the management of resources among peoples, and initiatives that promote peace and stability.
- 4** To maximise the participation of local and indigenous peoples in planning and decision-making.
- 5** To respect the culture and heritage of other peoples and to foster cooperative partnerships based on trust.
- 6** To end all vestiges of racial, sexual and sectarian discrimination, and to ensure fair and equal practices in employment and in decision-making bodies.
- 7** To ensure that the products and methods associated with industrial and agricultural production are geared to serve people and their environment and not vice-versa.
- 8** To recognise the reality of global interdependence and respect, sustain and replenish the delicate ecological systems that support life on earth.
- 9** To support “sustainable” development and management of the earth’s natural resources and to strive to find the kinds of solutions to people’s basic needs for food, energy and shelter that are both compatible with and enhance the environment.
- 10** To be accessible and accountable to the public.

A third generation trust: Ngā Manu Nature Reserve

In 1981, Roy's eldest child, Peter McKenzie, opened Ngā Manu Nature Reserve in Waikanae to create awareness of New Zealand's wildlife. Obviously, the third generation of McKenzies were no less keen to turn a private inheritance into a public good.

Peter McKenzie, born in 1952, grew up in Lowry Bay, Wellington, exploring the bush-clad hills and catching native trout in the streams flowing into the bays. School holidays at the family bach in the Marlborough Sounds launched a lifelong love of sailing. Peter did not enjoy formal education, but attending Nelson College also provided access to its outdoor recreational centre in the Nelson Lakes and sparked an interest in native plants. He went to Victoria University to study geology, but pulled out in the first year to get a job and ended up in Australia as a field assistant for a mineral exploration company in the Outback. It was here that he developed a fascination with birds and a keen interest in photography to capture their colour and antics. Peter returned to New Zealand with his future wife, Ruth, and when she was expecting their first child he got a job at Wellington Zoo as a bird keeper. Soon Peter and some of his colleagues, significantly David Mudge, became enthusiastic about creating a 'zoo' of indigenous rather than exotic species, concerned at the lack of awareness of New Zealand's wildlife. The year was 1973 and it was a time of considerable concern about conservation and the environment, with protests over French nuclear testing in the Pacific and memories of the controversial Manapōuri Dam, but Peter and his colleagues did not have the capital to turn their dream into a reality.



Peter McKenzie
working with a parakeet.
Ngā Manu Nature Reserve

Ngā Manu Nature Reserve today.
Ngā Manu Nature Reserve



Peter McKenzie became well known for his kiwi recovery programme.
Ngā Manu Nature Reserve



For his 21st birthday Peter received a significant parcel of Rangatira Ltd shares and the decision was made to gift one-third of them to form a nature reserve trust. With the help of his father, Peter gathered together a group of exceptional people with the necessary skills and experience to serve as trustees: David Mudge, with his expertise in aviculture; Sir Robert Falla, ornithologist, conservationist and museum director; and Professor John Salmon, author of numerous books on New Zealand flora. The Trust, established in 1974, was named Ngā Manu (Māori for 'the birds'), with its primary objective being 'to establish reserves and sanctuaries for the maintenance and preservation of New Zealand wildlife and native bush and plants, and in particular to advance knowledge of the living and breeding habits of indigenous fauna'. The project was joined later by eminent botanist John Dawson and naturalist (later Sir) Charles Fleming.

The hunt began for a suitable location with the necessary features: a stream, pond or swamp; some remnant native vegetation; and an environment that had the potential for improvement and was accessible to visitors. In the meantime, Peter bought a property at Paraparaumu to breed and rehabilitate native birds. With his regular talks to school and community groups, he soon became known as the 'Bird Man' among school children. Eventually, in 1978, the Trust found a small valley on Ngārara Road in Waikanae that encompassed a wetland surrounded with bush at the back of the farm of Moss Smith.

The Trust initially leased the 14 hectares, but soon purchased it outright. The Trust began developing the reserve in 1978 starting with the excavation of the major ponds, creating wetlands, planting many indigenous trees and eradicating pests, building aviaries and enclosures to house native birds and lizards (including tuatara), and in 1981 an information centre was built. Slowly, and after much mahi, Peter McKenzie's vision became a reality.

Ngā Manu Nature Reserve opened in 1981 and three years later was attracting over 17,000 visitors per year. In 1989 a nocturnal house was built. The 1990s saw a significant increase in the number of visitors to the reserve and the construction of an education centre. Today, Ngā Manu Nature Reserve attracts 20,000 visitors per year.

Since its inception Ngā Manu has partnered with the Department of Conservation and others in many breed-for-release programmes that seek to re-establish at-risk species of birds and reptiles. Peter and Ngā Manu became well known for their pioneering work in captive kiwi breeding and for the

tuatara recovery programme, and over the years many researchers have based their studies at the reserve. In addition, Ngā Manu has a long history of involvement in the treatment and rehabilitation of native bird species brought in by the community. The reserve has also played an important role in supporting conservation through strengthening the connection between people and the natural world, and is a regular destination for schools and community groups.

In 2012, Ngā Manu sadly lost its founder Peter McKenzie to cancer, aged 59, but his legacy lives on in the reserve (and supported by its shareholding in Rangatira Ltd) that 'not only encompasses a valuable and rare fragment of original lowland forest, it also symbolises a future where our indigenous natural heritage is not only valued and preserved, but is integrated back into our landscape, lives and consciousness.'¹⁹⁸

Ngā Manu Nature Reserve with Ruth McKenzie, Robyn and Scott Gibson, and children.
Roy McKenzie, Footprints



Women on board

By the start of the 1980s, one third of married women in New Zealand were in full-time employment, nearly twice the proportion in 1961, with another 20 per cent in part-time work. Women dominated professions such as nursing and teaching, but they also accounted for a fifth of lawyers and doctors (compared to three per cent a generation earlier), a quarter of dentists, and one in ten government officials.¹⁶² The feminist campaigns of the 1970s were starting to see results, such as childcare centres, which freed up more women to play more of a role in public life. In the mid-1980s, a government employment and vocation campaign espoused the slogan 'Girls can do anything' and, indeed, the 1984 Labour government included ten women in Parliament.¹⁶³ In 1989 when Rotary finally admitted women as members, Roy McKenzie was able to sit down to lunch at the James Cook Hotel with one of his trustees, Beverley Wakem, Wellington Rotary's first woman member.¹⁶⁴

At the time of his resignation in 1982, Bill Gee Taylor suggested to his cousin that the Trust could co-opt women onto the Trust board, and that year his own daughter joined the meeting. In 1983, Roy McKenzie invited two women on to the Trust: Diana Crossan, a probation officer;

J R McKenzie Trust board and staff in 1985. **Seated:** Prof. Sandy Macalister, Diana Crossan, Roy McKenzie (chair), Neil McKay (secretary) and David Ellis. **Standing:** David Hurley, Ken Winter, Wayne Nyberg, Doug Graham, Brian Burmester, Fred Burns, Margaret Lythgoe, Ton Haak, Colin East, John McKenzie, Graham Bishop, Trevor Gebbie and Dr Jack Mann.

J R McKenzie Trust



and Margaret Lythgoe, the former national secretary and president of the New Zealand Nurses Association. Lythgoe was followed by Hazel Ross from 1986 to 1987.

**Budget Figures
for Distribution (1980)**

Specific Objects	100,000
National Organisations	180,000
	<hr/>
	\$280,000
Provision for Special District and National Projects	85,000
Auckland	61,000
Hamilton	26,000
Wellington	66,000
Christchurch	37,000
Dunedin	34,000
	<hr/>
	309,000
	<hr/>
	\$589,000
	<hr/>

Roy McKenzie had personally helped fund some of the cost of Diana Crossan’s postgraduate study in social work at the University of Wales, Swansea, when her application to the J R McKenzie Youth Education Fund had not met its criteria. When she got back to Christchurch, she sent Roy a newspaper article which talked about the course she had completed and got an unexpected phone call from him asking for a meeting. It was the start of a lifelong friendship and two decades on the J R McKenzie Trust, including as the first woman chair from 1995 to 2001.¹⁶⁵ Diana also served on his McKenzie Education Foundation.

In 1988, Roy McKenzie invited Jenny Gill to become a trustee, which was the start of her 13 years on the board, including as acting chair. The former South Auckland primary school teacher, YWCA trustee and Council of Organizations for Relief Services Overseas (CORSO) worker was already the executive officer of the Roy McKenzie Foundation. In 1988 too, on the retirement of Neil McKay, the Trust engaged its first full-time employee, Lesley Newman (later Carmichael), as national secretary, and was already employing part-time assistant Maureen Ramsey. Diana Crossan recalls that for some of the trustees the presence of women at the table was a challenge, but that they brought a new perspective and opened up the board to new issues and organisations that might need to be supported by the Trust.¹⁶⁶ Even before the advent of women trustees, however, Roy McKenzie had led the J R McKenzie Trust to concern itself with social issues that impacted the lives of women, such as domestic violence, and to support organisations that supported women, most significantly Women’s Refuge.

Women's Refuge

The women's refuge movement owes much to Roy McKenzie and the support of the J R McKenzie Trust.

The first women's refuge in the Wellington area in Upper Hutt received significant financial support from Roy McKenzie personally and the J R McKenzie Trust from the late 1970s. This was at a time when what is now known as 'domestic violence' was regarded as a private matter and the police did not always respond to women's calls for help. As the refuge movement grew, so did applications for funding to the J R McKenzie Trust. As a community advocate and not just a creative giver, Roy McKenzie lobbied the National government behind closed doors from 1980 to 1981 for a one-to-one subsidy to put the refuge movement on a firm footing. The government's response was, 'bring the facts to back up the case for funding'. A grant to the Wellington Refuge from the J R McKenzie Trust was re-purposed to the newly formed National Collective of Independent Women's Refuges (NCIWR) in 1981 to conduct a socio-economic assessment of women's refuges. Commissioning research into an area the Trust was funding would later become routine best practice, but in 1981 it was ground breaking. Eighteen months later the final report made shocking reading and clearly revealed that domestic violence had to be treated as a major social problem. In 1983, NCIWR received its first annual government grant of \$92,000 to pay half the salaries of local refuge co-ordinators and half of that of the national co-ordinator.¹⁹⁹

The refuge movement still required the support of philanthropic trusts to supplement the government funding, and the J R McKenzie Trust continued to be the most consistent donor. The Roy McKenzie Foundation also provided a number of grants, including a seeding grant of \$8000 to help establish the Women's Refuge Foundation, which was set up to provide a capital base from which local refuges could draw funds in times of need. Sir Roy became its patron. During the mid-1980s, in response to claims of 'institutional racism' within the movement, grants were also made to support the position of Māori women within the movement, including funding a national Māori women's hui in 1986 and later providing a seeding grant to establish the position of a national Māori women's co-ordinator as part of NCIWR's landmark decision in 1988 to adopt a policy of parallel development of separate Māori women refuges.

A significant figure in the early history of the women's refuge movement, Raewyn Good, confirmed the significance of the support of Roy McKenzie and the McKenzie trusts when she claimed, 'Roy McKenzie has been critical to Refuge; he has helped to keep it alive.'²⁰⁰



Collective members and supporters of Te Whare Pounamu, Dunedin's women's refuge, celebrate its opening in March 1990.
Otago Daily Times

National Collective of Independent Women's Refuges current and historic logos



The Roy McKenzie Foundation



Sir Roy McKenzie, at the launch of SPELD NZ, 1984.
J R McKenzie Trust

The Roy McKenzie Foundation was established in 1986 with \$5 million to be spent within eight years, in keeping with Roy McKenzie's philosophy of distributing wealth to the generation who had raised it. The Foundation is remembered not only for the many innovative projects that received its funding, but also for the leading role it played in the development of philanthropy in New Zealand.

After four decades on the J R McKenzie Trust, Roy McKenzie had contact with some of the most innovative philanthropic foundations and emerging umbrella organisations for grant-making trusts in the United Kingdom and the United States. He could see that these organisations played a significant role, so modelled their best practice in grant-making to encourage the further growth of philanthropy in New Zealand.

The Roy McKenzie Foundation was established in 1986 from the residue of Roy McKenzie's earlier McKenzie Education Foundation and the sale to Rangatira Ltd of \$3 million of personal shares in the James Cook Hotel. Roy McKenzie appointed Jenny Gill as executive officer of the Foundation. She recalls that working alongside a gifted philanthropist on a daily basis was an extraordinary privilege: 'We once approved a grant – from the receipt of a phone call to the issuing of a cheque – in less than an hour.'²⁰¹ During the next eight years a small group of trustees, including Roy's daughter Robyn Gibson and daughter-in-law Ruth McKenzie (chair 1993–94), made decisions on grants and acted as his close advisers on a range of issues. Nine applicants out of 10 received no funding: the projects that the Foundation did fund were all seen to be ground breaking, addressed the needs of groups in the community that had the least access to resources or promoted innovative projects that could be seen to benefit the community as a whole.

Sir Roy always had an interest in supporting children with disabilities and learning difficulties. In the aftermath of the 1989 education reform, Tomorrow's Schools, early intervention in child education was a sector that fell through the gaps, as evidenced by the number of requests for support to the McKenzie Centre for Children with Special Needs in Hamilton and the Seabrook McKenzie Trust in Christchurch.²⁰² Aware of tensions between the groups working in the field, in 1991 the Foundation initiated and sponsored a seminar, Talking Together — Bridging the Gaps, which resulted in the community-based organisation SPELD

and education specialists coming to a 'shared understanding and mutual respect', one appreciated by the Ministry of Education. As a result of the seminar, the Foundation commissioned a publication explaining learning difficulties to parents and teachers.²⁰³

With health services and cuts constantly in the media spotlight the Foundation continued the work with the hospice movement, and as the number of community hospices grew supported the Cancer Society to establish Hospice NZ. It funded early women's health initiatives, including Fertility Action, a group set up by Sandra Coney and Phillida Bunkle in 1984 to raise awareness around infertility, and supported an emergency grant to uncover the 'unfortunate experiment' at National Women's Hospital. Māori and Pacific health initiatives also received funding. During the years when psychiatric patients were deinstitutionalised, the Foundation provided education and research, support to advocates for psychiatric survivors, and enhanced community care. The needs of the Deaf community had long been a personal interest of Sir Roy's and this continued under the watch of his Foundation, including seeding grants for the first *Dictionary of New Zealand Sign Language* and establishment of an interpreters' training centre. The Foundation also addressed less well-known issues, such as providing support for people with myalgic encephalomyelitis (ME), the debilitating condition first diagnosed as 'Tapanui flu' in the early 1980s; the genetically-transmitted and devastating Huntingdon's disease; or cystic fibrosis.

During the restructure of the economy and society during the late 1980s and early 1990s, the Roy McKenzie Foundation worked on empowering communities, including Māori, with support such as helping to fund the new urban Awataha Marae on Auckland's North Shore, and Project Waitangi to raise Pākehā awareness of the benefits of a bicultural society. It supported community services by funding community and People's Centres that provided a range of services for beneficiaries, including free medical services, low-cost dental services, crèche facilities, and a welfare rights and advocacy service; support for unemployment rights centres and employment initiatives, including employment for people with disabilities; empowerment of women through support for Women's Centres; and initiatives that supported children, family and young people at risk.

Reducing violence and abuse was another area of attention with support to Women's Refuge, Rape Crisis and regional sexual abuse HELP centres, and other preventative initiatives, including funding videos for school and university students to increase awareness, and seeding grants to Men for Non-violence.



Roy McKenzie Foundation executive director Jenny Gill with her son on the cover of the SPELD publication, published by the Roy McKenzie Foundation.
J R McKenzie Trust

Finally, the Roy McKenzie Foundation supported the arts as a social agency space for change, funding art and music for psychiatric patients, programmes in prisons and Māori theatre.

The Foundation's largest and most ambitious initiative was five years in the making and involved a \$1.5 million commitment towards the total cost of \$12.5 million: Capital Discovery Place in Wellington (today known as Capital E) was the first purpose-built children's museum in New Zealand.²⁰⁴

The Roy McKenzie Foundation was bold to support projects that at the time were highly controversial, including the fledgling women's health movement,



Rewi Thompson designed the children's science and technology museum Capital Discovery Place, which was located in Wellington's Civic Square, in conjunction with Athfield Architects in 1988. The pyramid shape at centre was part of the museum, which later changed its name to Capital E and has since moved to another site. Pictured: The opening ceremony in 1992.

Te Aho a Maui, Capital Discovery Place

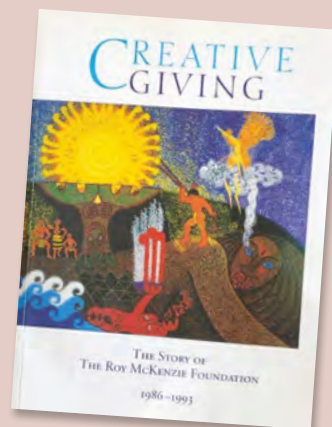


psychiatric survivors, Project Waitangi and People's Centres. Jenny Gill recalled that, 'I learned very quickly when I was working for the Foundation that a grant from one of the McKenzie trusts was, for many groups, a stamp of approval. Funding from McKenzie gave them credibility and confidence in approaching other funders and government for support.'²⁰⁵ It is important to note that the Roy McKenzie Foundation sometimes led, and at other times supported the same causes and groups as the J R McKenzie Trust championed, reflecting the fluidity of McKenzie philanthropy and family trusts.

The Roy McKenzie Foundation was the first grant-making trust in New Zealand to send staff and trustees overseas on sabbaticals, encouraging them to bring back ideas to inform the Foundation's philanthropic practices and develop the wider philanthropic sector in New Zealand. The New Zealand Association of Philanthropic Trusts (today Philanthropy New Zealand) and the Funding Information Service (today Generosity New Zealand) came out of this process, and the ten principles of philanthropy adopted at the First World Congress of Philanthropy at Toronto in 1988 became the code of practice for all the McKenzie trusts.

By the time the Roy McKenzie Foundation was wrapped up in 1994 it had made 1700 grants totalling \$8 million (capital and income) to projects that were creative, independent and innovative. Its story is well-documented in *Creative Giving: The Story of the Roy McKenzie Foundation 1986–1993*. This namesake foundation was indeed the culmination of Sir Roy's lifetime and philosophy of giving, encompassing his preference for innovative approaches to address social problems rather than alleviating symptoms, his endless encouragement of a culture of giving in Aotearoa, and sharing with others that the reward of giving is to 'die poorer, but be richer in spirit'.²⁰⁶

... the Roy McKenzie Foundation sometimes led, and at other times supported the same causes and groups as the J R McKenzie Trust championed, reflecting the fluidity of McKenzie philanthropy and family trusts.



Cover of *Creative Giving* (1994)
J R McKenzie Trust

Tangata whenua on the Trust

New Zealand began to make a stronger commitment to biculturalism from the 1970s, and government departments and other state agencies made major policy changes to reflect biculturalism. Perhaps the most lasting and influential change was made by the Waitangi Tribunal, set up in 1975, to investigate breaches of the Treaty of Waitangi. In response to the decline in use of the Māori language, initiatives such as kōhanga reo (Māori-language preschools), kura kaupapa (schools) and wānanga (universities) were set up to revive te reo and tikanga. During the 1980s, a new generation of urban Māori, with educational qualifications and status, began to draw public attention to Māori issues. The landmark *Te Maori* exhibition that toured the United States from 1984 to 1986 before returning to New Zealand for a nationwide tour in 1987, brought renewed attention to Māori art and culture. It was the start of the Māori renaissance.

Māori issues and projects had received support from the J R McKenzie Trust from the beginning, such as the training of Māori as Karitane nurses in the 1940s, but applications came through Pākehā channels and were seen through a Pākehā prism. In 1981, for example, the Auckland Rotary clubs bemoaned the fact that ‘we cannot hold a Māori member — Rotary somehow does not appeal’.¹⁶⁷ From the mid-1980s, as a wider effort to become accessible to different sectors of the community, Roy McKenzie co-opted Māori trustees who could bring a tangata whenua perspective to the board and the applications, and following the passage of the Māori Language Act in 1987 the Trust became the first philanthropic organisation to advertise its call for applications in te reo Māori. It was all part of a desire to create a greater connection with the needs of Māori charitable organisations.¹⁶⁸

The first co-opted trustee in 1985 was Tūroa Royal (Ngāti Raukawa, Ngāti Tamaterā, Ngā Puhī), with a long career in education and the

This pūrerehua (a wind instrument) is a koha presented to the Trust by Ngātokowaru Marae — Hokio, Levin.

J R McKenzie Trust



promotion of bilingual education, he had been the inspector of Māori and Pacific Island education in Auckland and Wellington from 1970 to 1978, and at the time of coming on to the Trust was the foundation principal of Parumoana Community College (later Whitireia Community Polytechnic). After serving for four years, Royal was succeeded for the now two-year term by kaumātua (later Sir) Archie Taiaroa (Te Āti Haunui-a-Pāpārangi, Ngāti Tūwharetoa, Ngāti Maniapoto and Te Arawa) 1989–91 (the term had been reduced so as not to over-burden busy, skilled professionals who were in high demand).¹⁶⁹ Successive trustees were Miriama Evans (Ngāti Mutunga, Ngāi Tahu) 1991–93, then assistant general manager of policy at Te Puni Kōkiri (later director of the Māori unit in the Ministry of Women's Affairs and a policy advisor to the Prime Minister's Department) and also a publisher (with others she published Keri Hulme's *The Bone People*) who was honoured for her community work with the title Wahine Toa; lawyer Joe Williams (Ngāti Pūkenga, Waitaha and Tapuika) 1994–96; and AUT lecturer in Māori development Teorongonui Josephine (Josie) Keelan (Ngāti Porou, Tupuri and Ngāti Awa) 1993–2002.



Justice Sir Joe Williams with Governor-General Dame Patsy Reedy on the day of his investiture at Manaia Marae on the Coromandel Peninsula, 10 April 2020.
Government House

Only a decade before he came on to the Trust in 1994, school leaver Joe Williams was a member of New Zealand reggae band Aotearoa and making headlines and topping the music charts in 1985 with his single *Maranga Ake Ai* — a song calling for Māori youth to take pride in their identity. After graduating with an LLB from Victoria University of Wellington, he had been awarded a McKenzie education scholarship to complete an LLM (Hons) at the University of British Columbia. On his return to New Zealand he set up the first Waitangi legal unit, at Kensington Swan, a major law firm, before co-founding his own firm in 1994 specialising in Waitangi Tribunal claims. After his two-year term on the J R McKenzie Trust, his stellar legal career continued as the youngest chief judge of the Māori Land Court in 1999 and chair of the Waitangi Tribunal in 2004. Justice Williams was appointed a judge of the High Court in 2008, a judge of the Court of Appeal in 2018, and the first Māori judge of the Supreme Court in 2019. Sir Joe Williams was knighted in 2020.¹⁷⁰

The high calibre of Māori trustees and their knowledge of te ao Māori was invaluable to the Trust, but a sole Māori voice, even a highly eloquent one, was not sufficient to significantly increase applications from Māori charitable organisations, which were still only between two and three per cent of all applications by the late 1990s. There was still reticence on the board to move away from ‘one process for all’ and towards ‘positive discrimination’ and dedicated funding to overcome institutional inequality, and to be fair, the J R McKenzie Trust’s inhibition was common among New Zealand philanthropists. The shift to engage with and support te ao Māori would not come until the first decade of the new millennium; it would transform the J R McKenzie Trust.¹⁷¹

Celebrations and challenges

New Year’s Day 1989 was Roy and Shirley’s 40th wedding anniversary and the family all gathered to celebrate at their holiday home in the Marlborough Sounds. During the day the news broke that Roy McKenzie had been made a Knight Companion for services to education and community

work. Diana Crossan recalls that it was only for this service, and not for his substantial philanthropy, that Sir Roy accepted his knighthood.¹⁷²

The following year was also a year of celebrations, with New Zealand's 150th anniversary of signing the Treaty of Waitangi, the Commonwealth Games in Auckland, and the golden jubilee of the J R McKenzie Trust. The trustees commissioned an oral history by Hugo Manson from the National Library to preserve Sir Roy McKenzie's recollections and the story of the J R McKenzie Trust. The Trust, together with the J R McKenzie Youth Education Fund and the Roy McKenzie Foundation, held a dinner for the McKenzie family on 6 March 1990. In his address to trustees and family Sir Roy commented:

Often around middle age and older we go from day to day living for ourselves and the important goals we have set. We tend to forget about the present. [...] Being a Trustee gives us direction. It helps us give direction to others. Fear often holds us back but getting involved helps overcome this. [...] The Trustees' greatest reward is helping such really worthwhile causes. It is a privilege none of us take lightly and it carries quite a responsibility.¹⁷³

Of course the golden jubilee provided another chance to give back to the community, and this time with the biggest grant distribution in the



Official 1990 New Zealand Sesquicentennial logo printed on a tea towel.

Te Ara New Zealand Encyclopedia

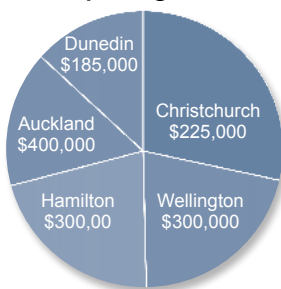


Roy and Shirley McKenzie celebrate their 40th wedding anniversary and the announcement of Roy's knighthood with family at the holiday bach in the Marlborough Sounds on New Year's Day 1989. From left: John, Shirley, Roy, Robyn and Peter.

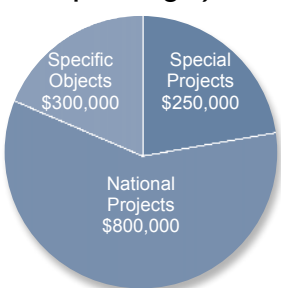
Roy McKenzie, *Footprints*

Giving for Good

1990 grant budgets per region



1990 other budgets per category



Trust's history — \$3 million — echoing its foundation in 1940, which marked New Zealand's Centennial. Many organisations received larger grants, and there were additional new projects, such as the establishment of Wellington's Botanic Garden Education and Environment Centre which was opened by Sir David Attenborough in 1991. However, the 'golden gift' was the establishment of an organisation that would assist giving in Aotearoa — Philanthropy New Zealand.

Despite the celebrations, in 1990 the economy was in the midst of the longest recession of the post-war era, and hit by the unintended consequences of the Labour government's economic reforms during the 1980s. The National government under Prime Minister Jim Bolger initially reinforced the process when Finance Minister Ruth Richardson's 'Mother of All Budgets' slashed government spending, including cuts to welfare benefits in 1991. Meanwhile, the balance of power in industrial relations had significantly changed in favour of employers and opened the door to increased inequality and emergence of the 'working poor'.¹⁷⁴ The J R McKenzie Trust came under pressure as community need increased and the welfare state contracted.

Sir Roy McKenzie and family after his investiture at Government House, Wellington on 17 May 1989. From left: Ruth and Peter McKenzie, Lady Shirley and Sir Roy McKenzie, Keith and Robyn Gibson.

J R McKenzie Trust



Golden gift: Philanthropy New Zealand

To mark the J R McKenzie Trust's golden jubilee, Sir Roy McKenzie called on New Zealand's philanthropic trusts and foundations to establish an umbrella organisation to fulfil his long-time desire to grow giving in New Zealand. The project's impetus came from a suggestion by Jenny Gill when she returned from an overseas sabbatical in her role as executive officer at the Roy McKenzie Foundation.²⁰⁷

The new organisation was supported by fellow Wellington Rotarians and philanthropists Jack Illott (John Illott Charitable Trust), John and Graeme Sutherland (Sutherland Self Help Trust) and Sir John Todd (Todd Foundation), who with Sir Roy McKenzie had operated as an informal philanthropic network at Rotary club meetings. The association began with 20 members, and its first conference was held in Wellington in 1991, with just 30 people.



**Philanthropy
New Zealand**

Tōpūtanga Tuku Aroha o Aotearoa

There have been significant changes in philanthropy over the last three decades, with the growth of family philanthropy, the rise of the large community trusts, an increase in corporate philanthropy and the emergence of Māori philanthropy. The association's current bi-annual conference is attended by hundreds of people, with a wide range of national and international speakers. Membership has increased to 130 private philanthropists; family, community and corporate foundations; and community trusts. More than 100 not-for-profit organisations that receive grants are community members. It has become the organisation that new philanthropists turn to for advice. In 2000 the New Zealand Association of Philanthropic Trusts became Philanthropy New Zealand.

The current executive director of the J R McKenzie Trust, Robyn Scott, was chief executive of Philanthropy New Zealand from 2003 to 2012.²⁰⁸ In 2007 it published the first of its regular surveys on philanthropic giving in New Zealand, *Giving New Zealand*. Its most recent survey in 2015 found that New Zealand's corporates, trusts and foundations, and including personal giving, totalled \$2.8 billion.

Philanthropy New Zealand is now a nationwide, highly respected and influential organisation. It has emerged as an influential force working with government on issues such as the 2008 changes to tax deductibility of charitable donations, an issue Sir Roy had raised with successive governments over the preceding 20 years. Following the Christchurch earthquakes in 2011, Philanthropy New Zealand played an important role to bring funders together and broker partnerships between grant-makers as the rebuild continues.

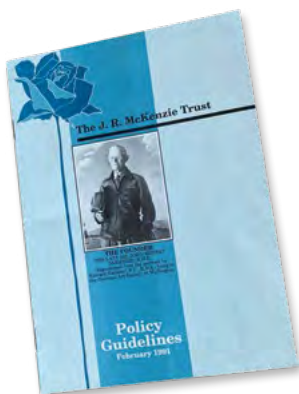
Philanthropy New Zealand plays a leading role in the growth of giving in Aotearoa; it is a fitting legacy of the efforts of Sir Roy McKenzie to celebrate the Big Trust's golden jubilee.²⁰⁹



Finance Minister Ruth Richardson speaking at a press conference following the presentation of the government's economic statement to Parliament with Prime Minister Jim Bolger, Bill Birch and Simon Upton on 20 December 1990.
Alexander Turnbull Library

By 1992 the Trust had allocated \$25 million over the previous 52 years, but most significantly, \$20 million had been distributed in the decade from 1982.¹⁷⁵ This huge increase in funding revealed the essential work of Rangatira Ltd, but also the increasing social needs in New Zealand. J R McKenzie Trust grants had always been a barometer of the pressures on society, and in 1992 the annual report noted, 'The increasing applications from Foodbanks signal the increase of poverty in New Zealand to an extent that

was unheard of even five years ago.' It also noted increasing requests from long-established, mainstream voluntary welfare organisations whose traditional sources of funding had dried up. The chair warned that, 'There is a risk that a critical point could be reached where the voluntary sector breaks down because of inadequate resources.' David Hurley hinted at a future debate over the need for systemic change 'to provide the necessities of life equitably within the community', but in the meantime, 'This Trust will continue to play its role to the best advantage in that ongoing challenge.'¹⁷⁶



J R McKenzie Trust

The J R McKenzie Trust provided a \$5000 grant in 1992 to kickstart the Funding Information Service (today known as Generosity New Zealand), a database of funders for community groups and social service organisations seeking assistance. This was another idea that Jenny Gill brought back from overseas. The service, launched in 1993, listed 350 philanthropic, government and local government funding schemes available to individuals, community groups and organisations. An advantage of the database for funders such as the Trust was that in general they received better informed requests from groups and fewer inappropriate applications. The digital database was much easier to update than the Trust's earlier funded project, *A Directory of Philanthropic Trusts*, first published in 1964 with 70 grant-making trusts, which had doubled to 146 grant-makers in its second edition in 1979.¹⁷⁷

The number of trusts doubled during the 1990s, and in the aftermath of the banking industry deregulation, sale of Trustee Savings banks, and

advent of community trusts, the distribution from trusts increased five-fold. With huge capital and statute-based governance, the community trusts dispersed much larger amounts of funding than private trusts, although they did so regionally rather than nationwide.¹⁷⁸ In a late-20th-century echo of the Trust's foundation story, Stephen and Margaret Tindall (who met through the Rotary Youth Leadership Awards in the early 1970s) established the Tindall Foundation in 1994 from the public float of The Warehouse retail stores.¹⁷⁹ In that same year film director Lee Tamahori's hard-hitting depiction of domestic and gang violence in an urban Māori whānau, adapted from Alan Duff's novel, *Once Were Warriors*, opened the eyes of New Zealanders to an unexamined aspect of modern life and the challenges of poverty, alcohol and drug abuse, domestic violence, sexual abuse and suicide.¹⁸⁰

The challenging environment of the decade resulted in administrative changes at the Trust. Significantly, after 45 years, the once-a-year distribution meeting was increased to three meetings in 1995, and with a separation of regional and national distribution. With the Roy McKenzie Foundation winding up, the national distribution was viewed as a means for the board to continue to oversee a modest Innovative Fund of less than four per cent of total funding by 1999.¹⁸¹ These changes were viewed as 'a transitional stage in the increasing sophistication of grant distribution'.¹⁸² It was a sign that things were starting to change at the J R McKenzie Trust.

In 1995 David Hurley stepped down from the Trust after eight years as chair and a total of 15 years on the board. In his final report he reflected on how the Trust had grown from \$300,000 in grants in 1980 to \$2.4 million in 1995, which he credited to the remarkable talents of the Rangatira Ltd board. To him, the most important thing was the people assisted by the Trust, and he recalled a father of a daughter who had died of cystic fibrosis coming up to him at a function and thanking him for the difference that the Trust's support of the Cystic Fibrosis Trust had made during his daughter's life. Hurley thanked the ongoing contribution of Rotarians, who continued to ensure the administration costs were a mere three per cent instead of the normal ten per cent. Most of all, Hurley appreciated

the privilege of working alongside Sir Roy, who in late 1995 was invested with New Zealand's highest honour, the Order of New Zealand, by Her Majesty Queen Elizabeth II at Government House in Wellington.¹⁸³ Hurley praised Sir Roy for introducing co-opted trustees who brought a diversity of voices on to the board so the Trust could better reflect and serve New Zealand society.¹⁸⁴ Indeed, Hurley's successor would be the first woman to chair the Trust.

Since coming on to the J R McKenzie Trust in 1983, Diana Crossan's career had flourished. After more than a dozen years at the Probation Service, and with her career progression restrained by the 'old boys' culture, she left to become the first manager of the Equal Employment Opportunities Unit at the State Services Commission. In this role she helped shape legislation on equal work opportunities for women, Māori, other ethnic groups and people with disabilities. After a similar role at the Ministry of Education she became the group manager of human resources at the Justice Department, changing the culture she had encountered in her early career. Crossan was setting up a new electricity state-owned enterprise at the time of her appointment as chair of the J R McKenzie Trust; a role that was still formally the nominee of the governor-general, who on this occasion was the first woman to be governor-general, Dame Catherine Tizard. Crossan would be the last chair so appointed as a result

Chair Diana Crossan with the J R McKenzie Trust board and staff in 1997. **Seated:** Ross Meadowcroft, Iain Hines, Alison Glen, Brian Palliser, Diana Crossan, John McKenzie, Jenny Gill and Peter McKenzie. **Standing:** Cedric Kelly, Wayne Nyberg (for Peter Smith), Mike Jaduram, Bruce Knowles, Leo Dixon, Murray Day, Jim Rayner, Peter Holst, Teorongonui Josie Keelan, Ron Horsley and Ross Murray. (Absent: Radha Balakrishnan, Peter Smith and Stuart Melville).

Alexander Turnbull Library



of a later amendment to the Trust legislation.¹⁸⁵ With a dozen years on the Trust and as a former chair of the Roy McKenzie Foundation during 1990–91, Diana Crossan was the obvious choice for the chair, but also a significant change as the first woman and the first non-Rotarian — ‘I’m not sure what was more challenging!’¹⁸⁶ With Crossan as chair and Lesley Carmichael as national secretary, together with the new Law Society representative, Radha Balakrishnan, who had begun her career at the Wellington Community Law Centre,¹⁸⁷ the Trust reflected a modern New Zealand which included successive women prime ministers at the end of the decade.

By the mid-1990s the economic reforms in education, health and welfare were impacting hard on the social services sector and the work of the J R McKenzie Trust. In her first report as chair in 1996, and with reference to a request to the Trust to fund basic support services for mothers and babies, Diana Crossan noted, ‘While the Founder of the Trust indicated that this was one of the aims of the Trust in 1940, we are surprised that it is again a need in 1996.’¹⁸⁸ The Trust was increasingly being asked to top up organisations’ operating budgets as the welfare state contracted and also as organisations experienced the pain of ‘contract crunch’ in the era of purchase-of-service contracts by government agencies.¹⁸⁹

Partly because of the introduction of coalition governments as a result of the first mixed member proportional (MMP) election in 1996, the National-led government preceded more cautiously in terms of its reforms. After a review in 1997, the J R McKenzie Trust also changed policy to embrace larger, multi-year funding programmes that could make a greater social impact. The Trust also established a new position of executive director, reflecting the growing professionalisation of the philanthropic sector long advocated by Sir Roy McKenzie. Lesley Carmichael finished eight years as national secretary and Iain Hines was appointed the inaugural executive director, now assisted by administration officer Alison Glen. Hines had a background as a social worker in the mental health sector and by the 1990s was running a trust

Lesley Carmichael and
Iain Hines in 1997.
Alexander Turnbull Library



providing accommodation and support for people suffering from long-term mental illness. At the time of his arrival at the J R McKenzie Trust he found an office operating largely as a 'letter box' — with large boxes of applications needing to be opened, acknowledged and collated for review by the board — and a tradition where 'many got a little', with an average grant for local organisations of \$2500 and for national organisations between \$12,000 and \$15,000.¹⁹⁰ But Hines had been appointed to help bring a shift in the way the Trust operated so it could make a greater social impact. The Trust signalled its intent with a new brand identity in 1998, and significantly the exotic rose was replaced with the kūmara vine. In that year too, Peter McKenzie, who had joined his father and brother on the 'Big Trust' in 1992, drove the establishment of a new trust to generate income, the Jayar Charitable Trust.

In 1998, Sir Roy published his memoir *Footprints: Harnessing an Inheritance into a Legacy*. Although five years on from when he had retired as a trustee, he kept a keen interest in the work of the Trust and wrote, 'Reality dictates that the Trust will need to be more selective in future.'

Jayar Charitable Trust

Peter McKenzie established and led the Jayar Charitable Trust to make a substantial difference to New Zealanders' lives.

The Jayar Charitable Trust arose from the sale of the investment company Perpetual Trustees Estate and Agency Company of New Zealand. The remaining assets from the sale, \$7 million, were invested in the Jayar Trust, which was also able to accept further bequests and donations. The name 'Jayar' is after a favourite horse from the Roydon Lodge Stud. The Jayar Trust's objects were similar to the J R McKenzie Trust, to which Jayar made its first donation of \$250,000 in 1998.²¹⁰

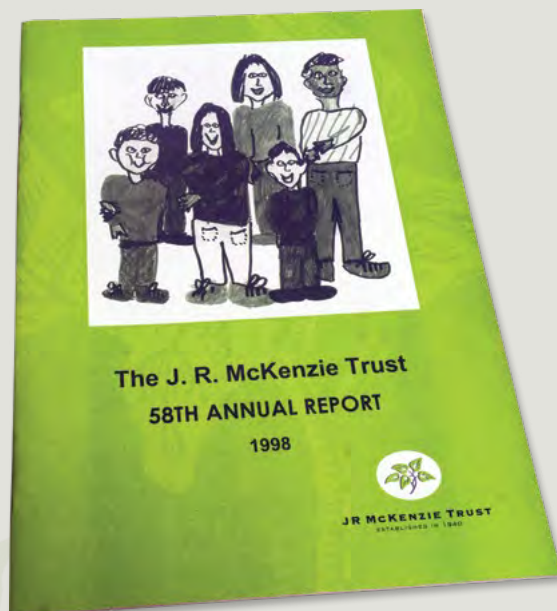
In 2011, in his role as chair, Peter McKenzie seeded the idea of spending all the Jayar Trust's funds within 20 years in one area focused on making long-term, substantial change. Following his death in 2012, the Peter McKenzie Project was named in his honour (see chapter 4).

Planting a new identity

The 1990s was the decade when the social services sector adopted a marketplace ethos, and brand identity became more significant. Voluntary organisations became 'non-profits' that needed to define and differentiate their service. Unlike some well-established organisations, the J R McKenzie Trust did not need to re-brand its proud name and history. In fact, when family philanthropy was so rare in New Zealand, the McKenzie name provided a rich and authentic brand story.

By the late 1990s it was time for the long-loved rose to make way for the native kūmara plant as the Trust's new identity based on the Māori whakataukī (proverb): 'Iti noa ana, he pito mata: With care, a small kūmara will produce a harvest'. The literal translation, 'Although small, it is still raw', refers to gifting a small, raw kūmara that can be planted, and the new shoots plucked and grown, and replanted to eventually reap a full harvest. The 1998 annual report explained, 'It conveys the idea of helping others to help themselves, the end result being much greater than the actual gift.'²¹¹

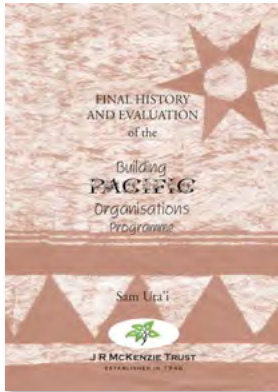
On the eve of the new millennium the kūmara plant was an appropriate bicultural identity for the J R McKenzie Trust that celebrated its proud tradition of giving and a future vision of funding partnerships to make enduring changes in communities.



The new logo first appeared on the Annual Report in 1998.

J R McKenzie Trust

It is sad that resources are so limited in comparison with the demand, and that community organisations need to invest so much of their energy in the competition for funds.¹⁹¹ This was a reference to the competition for state funding during the contract era and falling Trust income from the impact of the economic recession on the dividends from Rangatira Ltd. At the end of the decade, total grant funding more than halved to just \$1.47 million, a reduction of \$1.74 million on the previous year. Fortunately, this situation was short-lived as Rangatira Ltd's investments rebounded.¹⁹² The end of the 20th century was a very different place to when Sir Roy McKenzie had come on to the J R McKenzie Trust half a century earlier.



J R McKenzie Trust

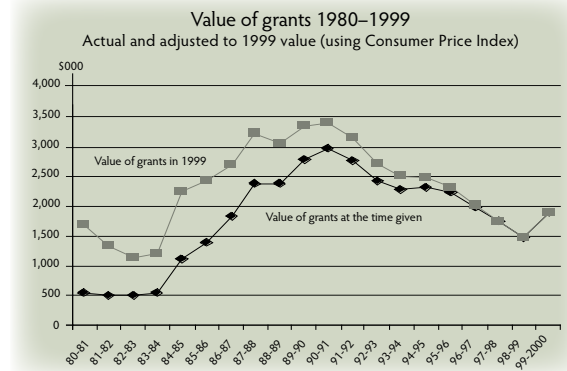
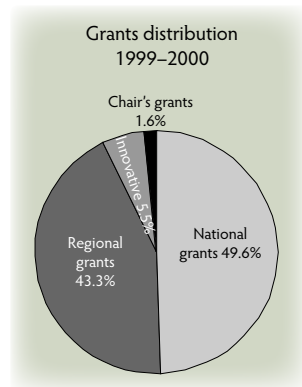
In 1999, the J R McKenzie Trust embarked on its first substantive multi-year funded programme, Building Pacific Organisations, with the aim to develop and strengthen governance, management and administration skills in Pacific social service and health organisations, and to generally build resilience in Pacific communities in Aotearoa. By 2001, some 16 organisations were being funded and an evaluation revealed that Pacific organisations appreciated the affirming support of the Trust and the practical financial ability to engage in training its governance and management. Meanwhile, with the support of its Pacific



Hamish Crooks, Iain Hines, Marilyn Kohlhase, Radha Balakrishnan, Jenny Gill, Maria Godinet-Watts and Tui Tāraro, the Building Pacific Organisations committee, 2006.

Roy McKenzie, Footprints

advisory committee, the Trust was learning how to engage with the Pacific community and about the need for more face-to-face contact over written applications.¹⁹³ When the Building Pacific Organisations programme finished in 2006, some 104 grants had been made to 77 organisations, including using the \$50,000 annual distribution to fund Pacific people on not-for-profit management courses at Unitec between 2005 and 2007, which was matched by the Tindall Foundation in the first collaboration between the two philanthropic organisations. A survey concluded that the success of the programme had been founded on the people involved, the relationships built, and an understanding of the dynamic between the funder and the applicant that ‘can only enhance the development of Pacific organisations and communities and hopefully influence and inform agencies that would continue to fund capacity-building initiatives in Aotearoa’.¹⁹⁴ It signalled the first steps on a new pathway of partnerships with communities and their organisations to bring about a more just and transformational impact in society.



Party like it's 1999

The Labour-led government elected in late 1999 under Prime Minister Helen Clark had campaigned on a platform to modify many of the extreme measures of the previous decade. It put in place a number of measures to review and improve the relationship with voluntary organisations. These included a new ministerial portfolio (Minister for the Community and Voluntary Sector), a working party to investigate the relationship between the sector and the government, and the establishment of an Office for the Community and Voluntary Sector within the Ministry of Social Development.¹⁹⁵

In the annual report that year, J R McKenzie Trust chair Diana Crossan reflected that, ‘1999 has probably been the busiest year in history. For some reason, getting things done “by the turn of the century” has become



In the 2019 New Year's Honours Diana Crossan was appointed a Dame Companion of the New Zealand Order of Merit for services to the State, including as chair of the J R McKenzie Trust. Her investiture by Dame Patsy Reddy was held at Government House, Wellington on 2 May 2019.

Government House

a rallying catch cry.' The Trust had made 'significant changes in the balance of our grant making. We will put more emphasis on innovation, while still focusing the bulk of our effort and funds on sustaining good quality existing services.' For myriad community groups and social services organisations a J R McKenzie Trust grant continued to be a stamp of approval and fill groups with confidence to continue to do what they were doing and to apply to other funders, while other grant-making bodies and government agencies respected organisations funded by the J R McKenzie Trust because it did its homework thanks to the considerable voluntary work undertaken by Rotarians.¹⁹⁶ Crossan also highlighted a discernible shift in the attitude of government agencies from inter-departmental competition and 'patch protection' to working together in service delivery and in support of the community sector. She noted that the Trust was also working more closely with other funders, and across the community sector there was 'renewed energy for improving co-ordination and its ability to contribute to social policy development'. The new millennium seemed set to usher in a new era while the chair confirmed that despite all the changes at the J R McKenzie Trust 'it is important that we never lose sight of our objective. Improving the social, mental and physical welfare of disadvantaged New Zealanders is still our goal.' In the meantime, Diana Crossan signed off: 'Have a great New Year's Eve Party!'¹⁹⁷

**“Trusts and Foundations
convert private wealth to
public purpose.”**





**“We believe that creating change
needs more significant and
ongoing support ... ”**





Chapter Five

Strategic giving

2000–2020

“The Board aims to make the greatest possible contribution to increasing the justice and inclusiveness within our social fabric. We believe that creating change needs more significant and ongoing support than we offered in the past Some things haven’t changed: The Board is still guided by the McKenzie legacy of generosity; it is our responsibility to apply the spirit of that legacy to today’s world.”

John McKenzie, 2010²¹²

Previous page:

Katz Ruatara (Ngā Puhī), a member of Lifewise Merge Community, selling Piki Toi (Supporter Art) products at a Christmas market in Tāmaki Makaurau Auckland in 2017. Each design on the Piki product was created by someone who had lived experience of homelessness.

Lifewise Trust

By the 2000s the J R McKenzie Trust recognised that in an increasingly crowded field it had an opportunity to give more strategically. It was the start of regular five-year reviews and strategic plans, more multi-year projects, and working alongside community organisations on programmes to support systemic change. It was a modern application of a vision long held by Sir Roy McKenzie, whose death in 2007 was a significant moment in time for the Trust, with the third generation of the McKenzie family in the chair and the fourth generation set to come on board. Rotarians still played a significant voluntary role as the number of staff increased to provide the professional advice and engagement required in the new world of partnerships between funder and supported groups. From 2010 the Trust made a significant shift from a responsive grant-maker to many groups to a strategic funder of a few for greater social impact. By 2020 it was a strategic-giving organisation delivering on a clearly articulated vision of creating a socially just and inclusive Aotearoa New Zealand.

This changing world

The hope of the new millennium was shattered by the terrorist attacks in New York and Washington on 11 September 2001. The events of 9/11 led to the longest war in modern history in Afghanistan and changed travel forever with increased airport security. It did not deter travel to New Zealand.

If New Zealanders began to travel the world from the 1970s, the world reciprocated, with tourism displacing the dairy industry as the country’s biggest money earner by the mid-2000s (although the travel industry

is in crisis at the time of writing due to the Covid-19 pandemic). Many tourists came on the back of the 100% Pure New Zealand campaigns and Peter Jackson's *Lord of the Rings* films. Many came to stay. Large-scale migration to New Zealand resulted in the population growing over the last two decades by almost one-third to 5 million in 2020. Auckland became a super city in 2010, and four years later was recognised as a super-diverse city, with 40 per cent of its population born overseas (it had long been recognised as the largest Pasifika city in the world). The country's economic settings meant that even as the economy grew, so did social inequity, with reduced house ownership, increased family poverty and rising homelessness.

The global financial crisis that confronted the new National coalition government under Prime Minister John Key in late 2008 did not shake New Zealand as much as the Canterbury earthquakes in 2011 and the Christchurch mosque attack in 2019. In 2020 the Covid-19 pandemic interrupted life with an unprecedented lockdown of borders, work and social life like nothing else in several generations. 'Zoom', an online meeting platform, entered the lexicon. Covid was a challenge for the Labour coalition government under Prime Minister Jacinda Ardern, but New Zealand's elimination strategy was upheld internationally as a success.

As New Zealanders increasingly became global citizens, assisted by a rapidly evolving online and social media space, culture and commemoration came to anchor their sense of identity. Even as Māori continued to fill the lowest social indicators, te reo Māori and tikanga increasingly became integral to a sense of the bicultural identity of New Zealanders (in 2020 the government announced the establishment of a public holiday during Matariki to celebrate te ao Māori from 2022). Treaty of Waitangi settlements and Māori entrepreneurship resulted in Māori standing with increased mana. But the redress of outstanding social injustices will still define the partnership in Aotearoa in the 21st century.

100% Pure New Zealand
advertising poster, 2004.
Alexander Turnbull Library



Shifting times

By the early 2000s the non-profit sector included an estimated 11,280 social service and 2120 health organisations.²¹³ Some of the early organisations supported by the J R McKenzie Trust no longer existed or were vastly different entities. In 2000, for example, the National Federation of Health Camps transformed into Te Puna: New Zealand Foundation for Child and Family Health and Development, and was now 90 per cent funded from government sources. The consequences of the contracting era was still playing out in the community sector. For some organisations, such as Plunket and Women's Refuge, the early 2000s was a period of turmoil and profound culture change as they continued to shift from voluntary organisations into professional service providers. The precarity of government service contracts was another challenge, perhaps most famously remembered when Plunket lost the 'Well Child' telephone support contract in 2006. Together with the number of new and diverse groups — many representing communities previously excluded — philanthropic funders could not remain static and to remain relevant needed to shift too.

By the new millennium, the J R McKenzie Trust was proud of its 60-year history in helping to build stronger communities through its support to organisations, but recognised the environment it operated in had vastly changed. The Trust had once been one of the largest private grant-makers in the country, now the \$2.4 million in grants made in 2000–01 was dwarfed by grants from regional community trusts, gaming trusts, corporate sponsorships and other family trusts — its contribution to all funds received by community organisations equated to less than a third of one per cent.²¹⁴ To ensure it continued to achieve the most effective change for good, it had to embrace change and become more strategic in its giving. The launch of its first website in 2001 was an acknowledgement that the J R McKenzie Trust intended to remain relevant.²¹⁵

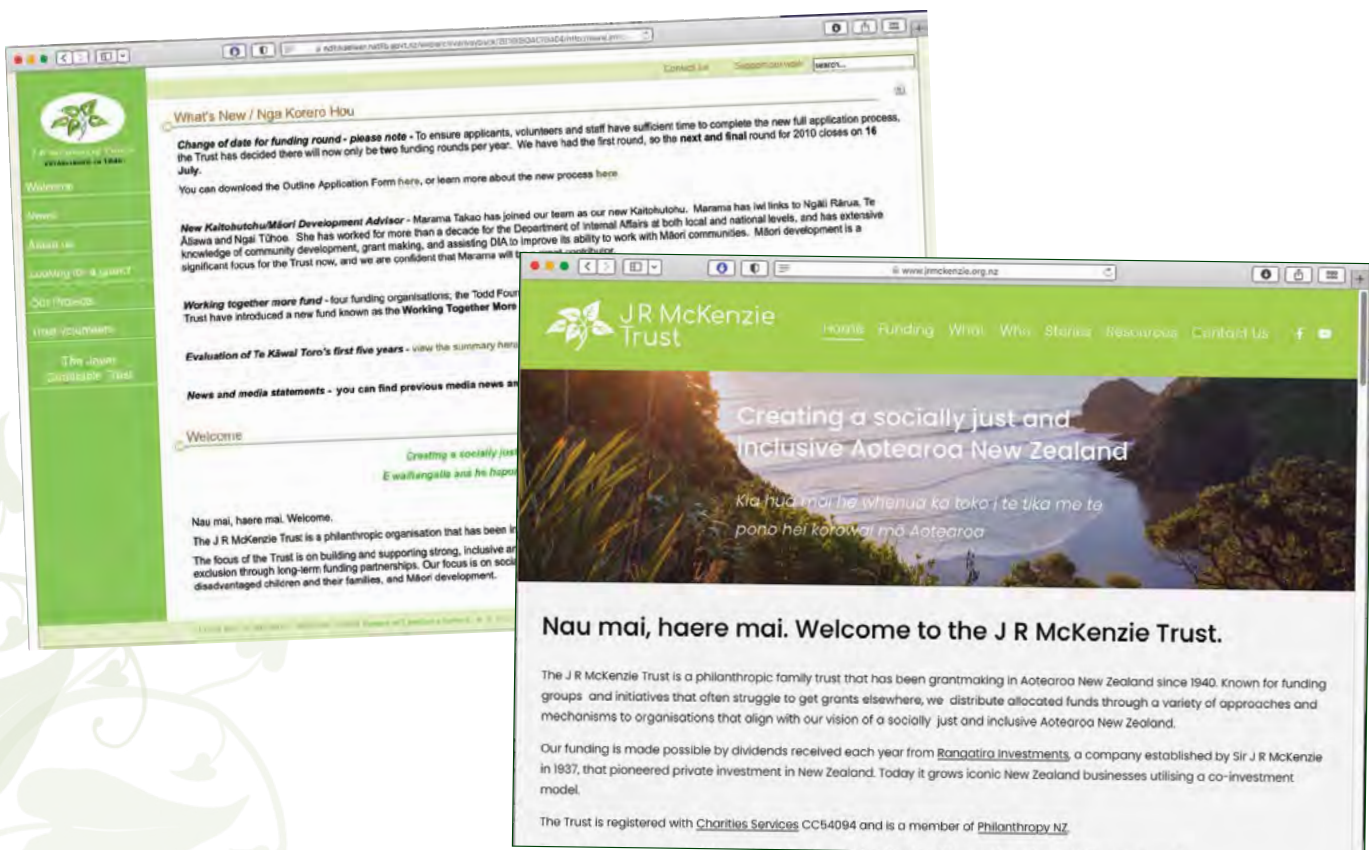
In 2002 the Trust successfully applied to the High Court to approve a modification to the composition and administrative powers of the board to meet its modern grant-making requirements and need to regularly renew

talent. Changes included a maximum 10-year term for trustees and the chair was no longer the pro forma nominee of the governor-general.²¹⁶ After 20 years of service Diana Crossan stepped down as chair in 2001 and from the Trust in 2003, as did Jenny Gill in 2001 after 13 years, including a stint as acting chair in 2000. At the time, John McKenzie reflected that Diana and Jenny ‘brought a different point of view ... greater support was given to Rape Crisis, the Women’s Refuge, support groups for Aids victims, and so forth’.²¹⁷ Crossan and Gill had challenged and ultimately transformed the collective thinking of the Trust to support organisations outside its day-to-day networks.

Dr Peter Holst, the New Zealand Medical Association nominee on the Trust since 1992, took over as chair for the next five years in late 2001. He had a career as a respiratory physician, associate professor of medicine and, at the time of his appointment, acting head of the Wellington School of Medicine. He had met his wife (later Dame) Alison Holst while both were studying at the University of Otago in the late 1950s.²¹⁸

On the back of the Building Pacific Organisations programme that continued its work through to 2006, the next multi-year project funded

Snapshot of the J R McKenzie website in 2010 archived by the National Library of New Zealand (left), and the Trust’s website in 2021.





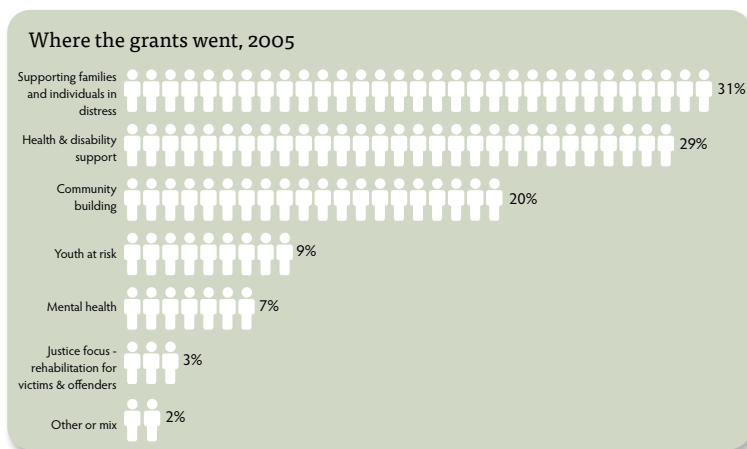
Giving It All Away was a documentary film completed in 2003.
J R McKenzie Trust

was the Refugee Employment Programme from 2002 to 2006. The Trust initially funded five projects across the country, including volunteer mentoring and classes by an English for speakers of other languages (ESOL) group, self-employment support of refugee women, job placement, job broking and the development of case management. ‘People who come here with nothing face huge obstacles in getting settled, and these five projects offer both practical help and ways of finding out what works best in the resettlement process,’ outlined executive director Iain Hines in launching the programme in early 2002.²¹⁹

The Trust was on the move in 2003. It shifted to premises on Lambton Quay and opened up the McKenzie Room to celebrate the story of the family, and that same year a documentary film was made, *Giving It All Away*.²²⁰ This was also the year that the Trust conducted a wide-ranging review ahead of adopting its first five-year plan — the start of regular five-yearly reviews as part of the new culture of continual evaluation.²²¹ The strategic plan 2004–09 provided the initial shift from purely responsive grant-making to more proactive support of specific programmes. There was increased attention to its own learning about making the most of its resources and engagement with communities and their organisations, but with a particular emphasis on Māori. The board introduced internal workshops to widen its community and cultural awareness and to evaluate its decision-making process as grant-makers.²²²

By 2005, the amount available for grants and associated development

was \$3.2 million, the most in the Trust’s history.²²³ Responsive grants continued to be made to hundreds of organisations active in community development, health and social services — two-thirds of the over 700 applicants received funding — with three-quarters of grants assisting with core operating costs, including salaries, rents and volunteer costs. National organisations received



47 per cent, 39 per cent went to regional organisations, 10 per cent to innovative grants, three per cent to Building Pacific Organisations and one per cent for the chair's quick-response grants. Groups with a Māori focus received 4.4 per cent, Pacific communities 4.7 per cent and 3.5 per cent went to groups working specifically with other ethnic communities, including refugees. The Trust was cautiously increasing funds for multi-year grants.²²⁴

From 2003, a working group was established to improve the Trust's contributions to address Māori social needs and aspirations, as identified in that year's review. The eventual proactive and multi-year funded initiative, Te Kāwai Toro, was the Trust's first significant step into what would later become known as 'transformational change'. For some board members ring-fencing funding for Māori was beyond their comfort zone, and they quietly 'peeled off', but successive chairs Peter Holst and John McKenzie championed the challenge and the opportunity of 'the Trust's potential to make a more telling contribution to the disproportionate number of Māori facing disadvantage.'²²⁵ Te Kāwai Toro, which is still



Haere mai! A greeting for a recent migrant during ESOL adult learners' week. In 2007, nearly 3000 home tutor volunteers taught English to more than 6500 learners, who between them spoke more than 100 mother tongues.

National Association of
ESOL Home Tutor Schemes

Change for good

During the last 20 years the J R McKenzie Trust has increasingly centred on addressing the underlying causes of social injustice and advancing equity through 'transformational change' and 'systems-focused solutions'. These concepts have developed over time, but most recently have been expressed by the Trust in the following manner:

- **Advancing equity** means addressing the underlying causes of inequity and exclusion to remove the conditions that hold inequities in place and prevent communities and individuals from fulfilling their potential.
- **Transformational change** describes a major positive shift or change that makes a big difference to people's quality of life.
- **Systems-focused solutions** are designed to fundamentally change the mechanisms and structures that cause systems to operate in a particular manner. In both obvious and subtle ways, systems often work better for some groups in society than others, negatively compounding the situation for those who already face the biggest challenges.²⁷²

going strong today, supported strengthening whānau within the context of Māori developing their communities, hapū and iwi; and improving the knowledge and networks of the Trust's personnel so that all of its grant-making endeavours were better informed about Māori aspirations. The programme was as much about building relationships and partnerships with ngā kaikōkiri as it was about allocating resources. Co-opted trustee Pania Ellison played a lead role in this work during her time on the board from 2003 to 2012; she was succeeded as chair of Te Kāwai Toro by trustee Manaia King. Te Kāwai Toro focused the J R McKenzie Trust on working in new ways with less emphasis on processing written applications and more on getting out of Wellington and on the road to meet with ngā kaikōkiri in their communities and on marae. To support this kaupapa, in 2007 the Trust established a new position of kaitohutohu/grants and programme advisor to build understanding and connection with Māori communities, while also helping with the increasing amount of professional project work required. The first appointment was PJ Devonshire (Ngāti Kahungunu ki te Wairarapa), who came from Te Wānanga o Raukawa where he had lectured in Mātauranga Māori, and had previously worked for the Department of Internal Affairs.²²⁶ It was the start of a hīkoi for the J R McKenzie Trust, not only to increase its funding of Māori aspirations in partnership with Māori, but also to embrace te ao Māori.

With a long history of supporting and enhancing the status of the Deaf community in Aotearoa, the J R McKenzie Trust established the Deaf Development Fund in the mid 2000s to give small grants to varied and innovative projects that might otherwise struggle for funding. In 2008, for example, a national hui for Deaf Māori was held to establish a national organisation.

J R McKenzie Trust





Te Kāwai Toro: 'The shoot that reaches out'

To increase its contribution to Māori community development and make its funding process more accessible to Māori, in 2006 the J R McKenzie Trust established a multi-year programme called Te Kāwai Toro — 'the shoot that reaches out'. Fifteen years later its impact has been significant, not just for ngā kaikōkiri but also for the Trust and its understanding of te ao Māori.

The programme's main thread was to offer substantial support for Māori-led approaches to whānau development. In its first year the Trust received 169 expressions of interest from all over the country. With its commitment to also fund a small number of shorter-term projects, the Trust eventually settled on supporting five multi-year projects. Their selection involved visiting all of the shortlisted applicants on their mana whenua to meet the people and hear more about their projects to strengthen whānau development. In addition to the specialised assistance it received, these visits also helped the Trust develop its understanding and networks. The initial groups, selected from all over

Rangatahi (young people) at a wānanga (conference) in 2007.
J R McKenzie Trust

New Zealand, were Ārai Te Uru Whare Hauora (Ōtepoti Dunedin) working intensively with selected rangatahi and their whānau; Maungārongo Pā Trust (Ohakune) strengthening whānau connections with and involvement in the hapū through co-ordination and website development; Ngāti Rangiwahakaturia — Whangaehu Marae Committee (Whanganui) building on the strengths of socially disadvantaged whānau and developing rangatahi leadership skills; and Ngātokowaru Marae Committee (Horowhenua) to support rangatahi development through planning, goal setting and links with mentors from the hapū. Despite best efforts, not all the projects were successful and a fifth project did not proceed.²⁷³

Promoting the mahi of ngā kaikōkiri at a national level became a priority ...

From 2010 to 2019, the J R McKenzie Trust provided \$593,702 to fund 31 ngā kaikōkiri under the Te Kāwai Toro programme, although the majority of its funding to Māori organisations continued to be distributed through the main responsive grants.²⁷⁴ Ngā kaikōkiri were supported to build their capability and capacity, to progress their social enterprise initiatives, and to assist those who advocated for positive social change. Promoting the mahi of ngā kaikōkiri at a national level became a priority, with an annual hui initiated to share their journeys with each other and members of the J R McKenzie Trust.

The impact of Te Kāwai Toro on the J R McKenzie Trust is seen in the Trust's increased support of Māori development, and the relationships it also fostered with other philanthropic organisations, government and iwi sectors to increase funding to Māori aspirations. It established a template for trustees to appraise Māori applications, and built a network of skilled, experienced and qualified kaihapai (mentors) to support the mahi of ngā kaikōkiri. The two-step process developed by Te Kāwai Toro to meet those seeking funding and to consider their proposals was adopted by the Trust for all of its large grants. In 2012, Te Kāwai Toro commissioned a Business and Economic Research Limited (BERL) survey that showed the philanthropic sector had little engagement with Māori organisations. As a direct result of this report, Te Kāwai Toro developed initiatives to attract and improve funding to Māori. It was another case of the J R McKenzie Trust leading the way for philanthropy in Aotearoa.²⁷⁵

Te Kāwai Toro began to attract attention and in 2014 it received the International Funders for Indigenous Peoples (IFIP) Award for its support of Māori self-determined development.²⁷⁶ In 2017, as an IFIP member, the Trust hosted the inaugural IFIP Pacific Regional Hui at Ōtaki in conjunction with Te Wānanga o Raukawa and Philanthropy New Zealand. Over 170 people attended — leading



SUPPORT



SHARE



CONNECT

philanthropic and government funders from New Zealand and around the world. The hui provided an opportunity for Te Kāwai Toro to strengthen networks and to focus participants' attention on how little philanthropic funding was allocated to New Zealand's indigenous communities.²⁷⁷

The catalyst to establish Te Kāwai Toro had been to increase the J R McKenzie Trust's support for Māori organisations. This came on the back of a 2003 review of the Trust's philanthropic practices after 63 years. It showed only 3 per cent of its funding went to Māori. From 2010 to 2019, grants to Māori grew incrementally from 4 to 55 per cent (an average of 35 per cent over the decade), and 26 per cent of the Trust's total work was now focused on Māori aspirations.²⁷⁸ This was a transformational shift in a decade. The most significant impact of Te Kāwai Toro has been the growth in partnerships with Māori communities and how te ao Māori has become a core part of the Trust's kaupapa. Significantly, today the Trust is led by its first Māori chair Manaia King to achieve its moemoeā (vision) of 'Kia hua mai he whenua ka toko i te tika me to pono hei korowai mō Aotearoa: A socially just and inclusive Aotearoa New Zealand'. With Te Kāwai Toro the shoot did not just reach out, but became deeply rooted in the J R McKenzie Trust.



Mereana Selby, Manaia King (Te Kāwai Toro chair) and Antony Royal receive the International Funders for Indigenous Peoples Award in New York, 2014.

J R McKenzie Trust

Lourdes Inga, executive director of the International Funders for Indigenous Peoples, addresses the Pacific Region Hui at Ōtaki in May 2017, supported by board members and staff of the J R McKenzie Trust and Te Wānanga o Raukawa.

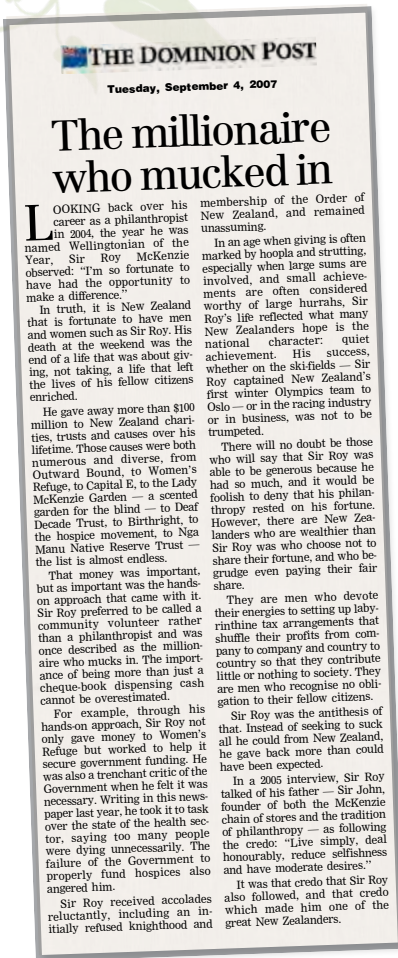
J R McKenzie Trust



The McKenzie connection continues

Sir Roy's death on 1 September 2007 left a great shadow over the Trust, but also an enduring legacy of giving.²²⁷ The tributes were plentiful. 'Sir Roy was one of New Zealand's leading philanthropists and gave more than 60 years of service to the community,' expressed Prime Minister Helen Clark in a release that mentioned the many foundations, organisations and programmes he had established and supported during his lifetime. Luamanuvao Winnie Laban, Minister for the Community and Voluntary Sector, added that Sir Roy was a great example of the very best in Kiwi generosity. 'Sir Roy dedicated much of his life to quietly strengthening the foundations of our society — grass-roots charities and community groups.'²²⁸ The *Dominion Post* editorial headlined, 'The millionaire who mucked in', highlighting that Sir Roy reportedly gave away upwards of \$100 million to charity in his lifetime, but preferred to be known simply as a 'community volunteer'.²²⁹

Much to Sir Roy's pleasure, his second son John McKenzie had already taken up the chair of the Trust in 2005.²³⁰ During his time as chair, John oversaw the implementation of the first strategic plan (2005–09) and the



Editorial, *Dominion Post*,
4 September 2007.
Stuff Ltd

Sir Roy McKenzie was
profiled in the 16 June 2007
issue of the *Listener*.
Jane Ussher/New Zealand
Listener 2007



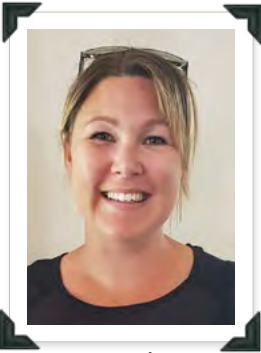
development of the second (2010–14) that embraced a significant shift in the history of the Trust (to be discussed shortly). Upon his retirement in 2010 after 28 years of service — a record second only to his father’s 43 years — John McKenzie wryly noted that, ‘At the risk of sounding like an old codger, I cannot avoid thinking back over that time. A lot has changed, and some things haven’t.’ He recalled that when he joined in 1982 the J R McKenzie Trust had been a relatively large funder, but it did little other than process grant applications. ‘Today, our society is more diverse,’ he continued. ‘More funding, more community organisations and countless more words about solutions have not been the panacea we hoped for. And the Trust now only contributes less than a quarter of one percent of all non-government funding going to community organisations.’ John McKenzie was proud that the new strategy, ‘arguably the most dramatic changes in the Trust’s 70 years’, would ‘make the greatest possible contribution to increasing the justice and inclusiveness within our social fabric. We believe that creating change needs more significant and ongoing support than we offered in the past.’ He was especially proud of the fact that the Trust had taken up the challenge of learning how it could support Māori. ‘Successful Māori development is a gain for all new Zealanders.’

Chair John McKenzie and the J R McKenzie Trust board in 2010. **Standing:** Neville Caird, Patrick Cummings, Tricia Walbridge, Lyn Holmes, David Vance, Pania Ellison, Warren Lindberg, Eric Keys and Charles Wilson. **Seated:** Radha Balakrishnan, John McKenzie, Alison Glen and Iain Hines. **Inset:** Julia Carr and Marama Tākao.
J R McKenzie Trust





Christopher McKenzie



Anna Gibson



Sybil Bloomfield

He recognised that the Trust’s networks had previously not naturally connected with Māori communities, but that since 2003 ‘we have learned how much we have to learn’ and ‘committed to an approach which supports Māori-led development, enabling “Māori to succeed as Māori”.’ Despite all this change, the final message was a timeless reminder that, ‘The Board is still guided by the McKenzie legacy of generosity; it is our responsibility to apply the spirit of that legacy to today’s world.’²³¹

Peter McKenzie had earlier retired from the Trust in 2005, after 13 years of service, and continued his work with Ngā Manu Trust until his untimely death from cancer in 2012. Lady Shirley also died of cancer in 2012 and the Trust acknowledged how much of a lynchpin she had been in supporting her husband and children to be active in the Trust and philanthropy in general, in addition to her own significant activity in several charities.²³² John McKenzie’s cousin, David Vance, joined him on the board in 2006 and he served ten years. In addition, Sir Roy’s daughter, Robyn Gibson, was a personal trustee and had earlier served on the Roy McKenzie Foundation. It was a strong record of service by the third generation on the Trust and it was now time for the fourth generation to come on board.

Christopher McKenzie, Peter McKenzie’s youngest son, with a career in IT management, joined in 2010 and served ten years to 2020. In 2016 he was joined by his cousin Anna Gibson, the daughter of Robyn and Keith Gibson, and an accountant. In 2019 the Trust arranged an informal get-together of the fourth generation to discuss the history and legacy and to provide input into the review that was underway for the current ten-year strategic plan. In 2020, Sibyl Bloomfield, John McKenzie’s daughter, joined her cousin Anna as the latest family member on the Trust.²³³ It is a remarkable history of McKenzie family commitment and connection with the J R McKenzie Trust over four generations.

Making the shift

From late 2008, the global financial crisis began to impact New Zealand, and non-profit groups found it harder to meet costs and provide services. In 2009, the J R McKenzie Trust responded by joining with three other major

private funding organisations — the Tindall Foundation, the Todd Foundation and Wayne Francis Charitable Trust — to establish the Working Together More Fund (He Pūtea Mahi Tahi) to model collaboration and help other organisations collaborate. One of its first initiatives was to fund two large youth organisations, NZ Aotearoa Adolescent Health and Development and the National Youth Workers Network Aotearoa, to join forces to create a new umbrella organisation, Ara Taiohi (Pathway for Young People), to support thousands of people who work with young New Zealanders.²³⁴



The J R McKenzie Trust was a founding member of the Working Together More Fund that in 2021 includes eight of the largest private foundations and trusts in Aotearoa New Zealand and is known as Weave.

The Working Together More Fund (today known as Weave — Working Together) coincided with the J R McKenzie Trust contemplating how ‘to achieve the most effective change for good’ in its most comprehensive review to date in 2009. It included research reviews, discussions with leaders in the field, and some deep thinking by trustees on how the Trust could contribute the most value while continuing to fulfil its mandate. The new strategic plan 2010–14 was summarised in the heading ‘Sharper focus for J R McKenzie grants — fewer, larger, longer’. The 2009 annual report highlighted that, ‘We will shift away from making many small annual grants to fewer, larger, multi-year grants. We will look for opportunities to build relationships with the organisations we support, and other ways



Kim Workman, director of the Robson Hanan Trust (right) greeting senior members of the Mongrel Mob Notorious Chapter, Edge Te Whaiti (left) and Winiata Soper, both representing Te Ara Tika o Whānau — a trust seeking to break the negative cycle of crime, violence and alcohol and substance abuse in the Chapter. Both trusts were selected for support by the J R McKenzie Trust board in 2010.

J R McKenzie Trust

**The Trust's shift
in grant-making**



alongside grants in which to support their work.’ The Trust chose two major areas of focus — disadvantaged children and families, and Māori development — while not turning its back on other marginalised groups in society. With this shift, the Trust believed it would retain its relevance and impact, and deliver on its new vision of creating ‘a socially just and inclusive Aotearoa New Zealand.’²³⁵ After a review in 2014, and mostly minor changes, the strategy rolled on into its third five-year plan in 2015–19, and by the end of the period it was being viewed and evaluated as the first ten-year plan.²³⁶

Taking a look at the Trust’s responsive grants funding stream during the decade demonstrates the extent of its shift in grant-making, the most transformative in its history. The responsive fund still delivered the overwhelming majority of funding, but delivered it very differently under a multi-year model and investing for outcomes. In 2010 the Trust was limited to two funding rounds per year, and requests needed to be closely aligned to the strategic focus and supported by a two-step application process (a brief outline followed by a supported full application and a visit). This resulted in a reduction in applications from 709 in 2010 to 138 in 2019, and new grants reduced from 486 in 2010 to 30 in 2019. The corollary of this shift to multi-year funding and focus on investing for

Saeeda Mohamed (left) and Faiso Omar (right), from Somalia, at catch-up classes for refugee students in Auckland in 2010. The J R McKenzie Trust two-year grant in 2010 funded the weekend classes for up to 100 students to improve their chances of a higher education and a good vocation.

Exposure International /
J R McKenzie Trust



outcomes resulted in increased grant amounts to supported groups, with the average grant of \$6200 in 2010 increasing to \$110,000 in 2019, and the largest going from \$50,000 to \$300,000. The most transformative aspect of this increase in funding was to Māori aspirations, with an increase from 4 per cent in 2010 to 55 per cent in 2019.²³⁷ In short, fewer groups were getting much more to make a bigger social impact.

The responsive grants within the remits to disadvantaged children and their families, and Māori development, still supported a diverse range of groups active in health, social services, community development and advocacy for improved government policies in line with the Trust's vision. In 2010, for example, the groups funded ranged from providing catch-up classes for school students from refugee backgrounds, promoting growing healthy food in Māori communities, supporting parents in remote locations who had children in need of cochlear implants, to a project to discuss a re-think of crime and punishment, broadband internet connection for education in the Tūhoe region, and a number of initiatives for wāhine and tamariki living in gangs as one of the strongest motivators for change in gang behaviour. The dramatic multi-year increase of funding to the Child Poverty Action Group in this same year, which the Trust had supported on an annual basis since its establishment in 1994, acknowledged that



Billy Graham Youth Foundation is about teaching rangatahi life-skills through participation in, and the discipline of, boxing and physical fitness.
Billy Graham Youth Foundation



The 'Take Steps for Child Poverty' march organised by Child Poverty Action Group in September 2014.
Child Poverty Action Group



E Hine, an educational curriculum designed to empower and support girls on the path to womanhood through embracing Poutama Rites of Passage, kaupapa Māori, community leadership, non-violence and outdoor education.

E Hine

government actions were required to reduce child poverty.²³⁸ From 2014 to 2016 the Trust funded the salaries of the executive officer, and the research and communications officers of the Child Poverty Action Group.²³⁹ By 2019, the Trust was working with the Billy Graham Youth Foundation to teach life-skills to rangatahi through the discipline of boxing at the Naenae Boxing Academy — a historical continuity going back to the time of J R McKenzie and his support of the Crichton Cobbers' Club in Christchurch. At the same time, the Trust supported E Hine, a community-initiated curriculum using ancient Māori wisdom to provide adolescent girls coming of age in the digital era with tools to guide them into adulthood.²⁴⁰

In terms of the proactive funding stream, alongside Te Kāwai Toro, Connecting Education and Communities was an integral component of the J R McKenzie Trust's work during the decade. Starting in 2010, the programme supported better educational outcomes for disadvantaged children through increasing the involvement of parents and families in their children's learning. With a budget of \$1.5 million for the first five years, the Trust supported a small number of community-led initiatives around the country through funding, mentoring and connecting them to

The final hui of the participants in the decade-long programme, Connecting Education and Communities, was held at Muaūpoko's Kawiū Marae at Taitoko/Levin in March 2020..

J R McKenzie Trust



one another.²⁴¹ From 2015 to 2020 the programme developed to support another six diverse communities, from Kaikohe to Kaikōura, to improve educational outcomes for tamariki and whānau. By working proactively and in partnership with communities, Connecting Education and Communities broke new ground for the Trust; it addressed the negative impacts of child and family poverty by allowing time for community voices to be heard, supported locally driven solutions, and it resulted in long-term systems change in these communities. In 2020, Rangimārie Mules from Te Rūnanga-Ā-Iwi-Ō-Ngāpuhi in Kaikohe provided this testimonial: ‘I think a big part of the impact and scale of this project was the reclamation of culture and social norms that reinforce behaviours and systems that build our people up. It’s a decolonisation process ... our systems impact is about reclamation.’²⁴²

In short, this significant shift from being a traditional grant-maker to hundreds, to a strategic funder of fewer, more diverse, but connected responsive projects in a supportive partnership beside its proactive programmes, was enabling the J R McKenzie Trust to achieve the systems change it now sought to overturn inequality and exclusion in society.

He tangata

This major shift to strategic funding was an exciting period in the history of the J R McKenzie Trust, but it needs to be stressed that change does not just happen, it requires courage to champion change and much effort to implement it. The new enquiry-grants process and way of working in supportive partnership with ngā kaikōkiri for systems change required considerable thinking at the Trust and engagement on the ground. What had not changed at the J R McKenzie Trust was the commitment and devotion of its people: McKenzie family members, Rotarians and other voluntary trustees, and its now growing professional staff.

John McKenzie as chair, together with executive director Iain Hines, oversaw the review and development of the new strategy during 2009–10. It was then implemented by successive chairs: Radha Balakrishnan, the New Zealand Law Society nominee since 1996 and chair from 2010 to 2012,²⁴³ and Patrick Cummings, the Rotary District 9930 nominee since

2008 and chair from 2012 to 2018. ‘Embedding the new ten-year strategy,’ reflected Patrick Cummings in 2018, ‘has been very satisfying and I hope it will serve as a springboard for even greater advancements in the future.’²⁴⁴ Manaia King (Tainui, Ngāti Hauā and Ngāti Korokī Kahukura) took over as chair in 2018. He had been appointed to the Trust as the nominee of the New Zealand Law Society in 2012 and chaired Te Kāwai Toro. A social justice and equity advocate with a passion for improving the health and wellbeing of indigenous peoples, but particularly Māori, Manaia was an exceptional leader who was comfortable in both te ao Māori and the business and philanthropic spaces. He had built strong international relationships through his work on the board of International Funders for Indigenous Peoples. His appointment was a reflection of his skills and experience, but also as the first Māori to chair the J R McKenzie Trust it reflected how far the Trust had come from when it appointed its first Māori co-opted trustee in 1985. In fact, Manaia King’s appointment was, as fellow trustee Dr Chelsea Grootveld (Ngāi Tai, Ngāti Porou, Te Whānau-ā-Apanui, Whakatōhea, Te Arawa) expressed at the time, ‘hopefully a sign of greater diversity within philanthropic governance and the broader philanthropic ecosystem’.²⁴⁵

In 2012 Ngā Kanohi Marae o Wairarapa (NKMOW) provides young people with the skills, knowledge and support they need to build a future for themselves and their communities.

J R McKenzie Trust



The board overall was now much more diverse in terms of gender, ethnicity and backgrounds — even the Rotarian nominees — and much younger than in previous decades. From 2012 to 2017, Samoan New Zealander Liz Tanielu, the director of the Family Violence Unit and later national director of Pacific, both at the Ministry for Social Development, was the first Pasifika trustee. Aiolupotea Lili Tuioti, with a background in education and manager of the Salvation Army Centre in Newtown, and Jay Farris, also an educator, community worker and public servant, both Samoan New Zealanders, joined the board in 2018.²⁴⁶ By 2020, the board photo was very different from past decades, with a distinct lack of suits and ties. Trustees were younger and more diverse, and eight of the 13 were now women — it represented modern Aotearoa New Zealand.²⁴⁷

The Trust needed the right staff to evaluate the projects and engage with supported groups. Marama Tākao (Ngāi Tūhoe, Te Āti Awa, Ngāti Rārua, Ngāti Toa Rangatira, Ngāti Tama, Ngāti Tahu) joined in 2010 as the new Kaitohutohu/Māori development advisor and later Pou Ārahi. Marama had previously worked for more than a decade as a community/Māori development and funding advisor at the Department of Internal Affairs, and over the next decade would be a key person to the Trust's partnerships with ngā kaikōkiri. 'We know from experience, it takes a focused commitment to support Māori aspirations,' said Marama Tākao.²⁴⁸

In 2010 the Trust moved to electronic files, ending 70 years of boxes of applications. The shift was necessary to support the new online application process, maintain the partnerships with supported groups and manage the continual evaluation that was now the way of working at the Trust. In late 2011, Sam Caldwell, recently arrived from the United Kingdom with experience as a programme manager at a community development foundation, was appointed to the new position of grants and programmes advisor.²⁴⁹ When he returned home in 2015, Eileen Kelly was appointed as the grants and programmes manager. Eileen had experience in many community organisations and a strong commitment to social justice and human rights. Her past roles had included advocacy, community development, training, fundraising, grant-making, management,



The Mixit Charitable Trust has a rich history empowering young people from refugee and migrant backgrounds by providing creative platforms that increase confidence and develop capacity. Since 2006, Mixit has been encouraging their young people, or Mixers, to engage in collaborative teamwork, grow decision-making skills and develop leadership abilities.

Mixit Charitable Trust



J R McKenzie Trust executive director from 1997 to 2017, Iain Hines (left), receives a Rotary International Paul Harris Fellowship from Trust chair Patrick Cummings.

J R McKenzie Trust

partnership development and communications.²⁵⁰ In 2017, Alison Glen retired after 20 years as administrator at the Trust. Helen Anderson was appointed as part-time Trust co-ordinator and later systems manager from 2017 to 2019. Helen had a career background in the charity sector and in her spare time founded her own charitable trust Film for Change Aotearoa that created short films for local community groups.²⁵¹ In 2018, Beverley Richards, with a background in management in the education and IT sectors, joined the staff as Trust co-ordinator and later operations manager. Finally, in 2021, in recognition of the J R McKenzie Trust's commitment to Pacific Peoples — one of four pou (communities of interest)



Former and current trustees at the J R McKenzie Trust 75th anniversary dinner at Parliament on 18 November 2015. **Front row:** Charles Wilson, Warren Lindberg, Lesley Carmichael, Joan Smith, Jenny Gill, Patrick Cummings (Chair), Pania Ellison, Manaia King, Che Wilson and Eric Keys. **Back row:** David Vance, Diana Crossan, Jonathan Usher, Tricia Walbridge, Christopher McKenzie, Lyn Holmes, David Hurley, Radha Balakrishnan, Peter Holst, Liz Tanielu and Neville Caird. J R McKenzie Trust

— Sylvia Moe was appointed as Pacific strategy and engagement lead. With her *aiga potopoto* spread across the Samoan villages of Faleapuna, Tafagamanu Lefaga and Gataivai, Sylvia had a background in strategy, policy, programme design and management.²⁵² By 2021, the Trust had a total of six professional staff, which was still lean, but an effective office for the amount of work undertaken by the Trust.

In 2017, after 20 years, Iain Hines retired as executive director. His invaluable contribution during a period of significant transformation at the Trust's history was acknowledged, and also his contribution to the wider community and social services sector in Aotearoa. Two years earlier, at the Trust's 75th anniversary dinner hosted at Parliament on 18 November 2015, Iain was presented with the Paul Harris Fellowship awarded by Rotary International for service to the community.²⁵³ In 2018, he received the Perpetual Guardian Lifetime Achievement in Philanthropy Award for his enduring contribution as a leader in philanthropic and grant-making organisations. It was noted with pride in the Trust's annual report, for Iain Hines had not been lost to the J R McKenzie Trust because in 2017 he had taken on the new role as director of the Peter McKenzie Project dedicated to the complex social challenge of reducing child and whānau poverty.²⁵⁴

The new executive director Robyn Scott had held leadership roles in various not-for-profit organisations, including Philanthropy New Zealand, which the J R McKenzie Trust founded, and Age Concern New Zealand. She had come to the Trust from the Ministry of Youth Development where she was director. Robyn's expertise, experience and commitment to the Trust's vision, along with Iain's support, ensured a smooth transition as the Trust powered on with its strategy of structural change.²⁵⁵ 'This "disruptive change for good" makes sense to me,' reflected Robyn Scott on her first year at the Trust, 'It's the idea that radically altering how we approach challenges can inspire a creative solution, one that won't have been examined or instigated before. I believe this mindset is evident in many of the initiatives and programmes that the J R McKenzie Trust supports.'²⁵⁶



Peter McKenzie Project

Imagine an Aotearoa New Zealand where all our children, young people and mokopuna flourish — he oranga tamariki, he oranga whānau, he oranga tāngata — this is the vision of the Peter McKenzie Project.

Peter McKenzie was instrumental in establishing and leading the Jayar Charitable Trust. The Jayar Trust had originally been an investment arm for the J R McKenzie Trust, but Peter McKenzie seeded the idea of spending all of its funds on one focus over a period of up to 20 years. In his words, 'This scale of investment in a single project or area could have a really significant impact, generating a much greater "social return on investment" than could be achieved by continuing the present strategy.'²⁷⁹ Sadly, Peter died in 2012. The J R McKenzie Trust subsequently took the decision to establish the Peter McKenzie Project in his memory.

In 2017 when the Peter McKenzie Project launched with Iain Hines as its director, 28 per cent of Kiwi kids were living in a low-income household where their caregivers were struggling to provide them with the basics needed for them to flourish, for example, food, shoes and a warm house. That was one in every four children in Aotearoa New Zealand and a ratio that had doubled over the past 30 years.²⁸⁰ The Peter McKenzie Project wants to ensure that tomorrow's tamariki do not suffer the sometimes lifelong effects of living in poverty.



The Peter McKenzie Project seeks ideas to change the root causes of social problems to reduce child and family poverty. In comparison with the J R McKenzie Trust, and as a feature of it being funded from the Jayar Trust with its limited lifespan, the Peter McKenzie Project has a more 'experimental approach' and a higher propensity for risk in return for reward. 'If everything you back succeeds you haven't taken enough risks,' reminds director Iain Hines.²⁸¹ The initial call received 259 ideas that were reviewed and assessed; currently eight projects, initiatives seeking to understand the structures and systems that lock families into poverty and how to unlock these constraints, were developed in partnership and funded. Tokona te Raki, for example, is a Ngāi Tahu-led collaboration that aims to increase Māori participation, success and progress in education, employment and income. Its goal is to achieve equity in these areas for all Māori in the Ngāi Tahu takiwā by 2040.

Advocacy is also a big part of the Peter McKenzie Project toolkit. In 2019, five organisations — ActionStation Aotearoa, Child Poverty Action Group, NZ Council of Christian Social Services, The Workshop, and FinCap — campaigned together for welfare reform to enhance the mana of users and help them achieve their aspirations.²⁸²

The Peter McKenzie Project approach is encapsulated in the metaphor of a flotilla of waka (the whole more than the sum of the parts) traversing the ocean to an Aotearoa where all tamariki have the chance to live a life filled with opportunities to thrive. There could be no better result to honour the memory and legacy of Peter McKenzie.²⁸³



One of the research findings coming out of the Tokona te Raki collaboration, established to increase Māori participation, success and progression in education, is the adverse impact of streaming on Māori tamariki and the call to end it in schools. Tokona Te Raki



Funding advocacy for impact

One of the most bold and innovative aspects of the J R McKenzie Trust's strategy has been in the area of funding advocacy for impact. In many ways, the Trust has always incorporated an element of advocacy, and the personal advocacy of Sir Roy McKenzie was legend. See Here, advocating on behalf of children with correctable vision loss (see page 184), was the Trust's first major initiative that moved from grant-making to an evidence-based funding approach to champion advocacy as a means to achieve changes in public policy and practice.

Between 2010 and 2019 some 18 per cent of the Trust's total funding has been on advocacy for impact. However, in order to 'seize the day' and obtain maximum impact, it has the flexibility to range much higher in some years (in 2012–13, for example, 38 per cent of its funding was allocated to advocacy).²⁵⁷ The Trust's three proactive programmes all included elements of advocacy. Te Kāwai Toro, with its aim of increasing national funding to Māori development, was increasingly weaving advocacy into its mahi, as were Connecting Education and Communities and the Peter McKenzie Project. The following overview of some of the organisations supported by the J R McKenzie Trust reveals how much impact funding advocacy has had on the New Zealand social landscape.

ActionStation Aotearoa has campaigned on many issues. Former director of ActionStation Laura O'Connell Rapira (Te Ātiawa, Ngāpuhi, Te Rarawa) campaigning for better public mental health services in 2016. ActionStation Aotearoa

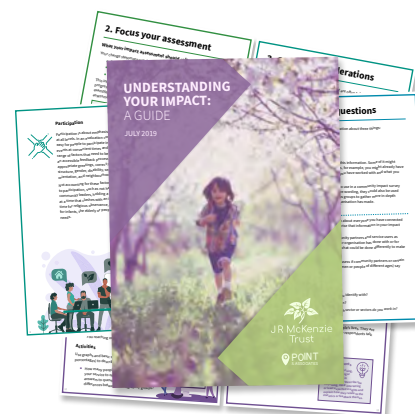


The Trust's work on the Child Poverty Monitor (see page 185) has highlighted that child and family poverty and its social impact requires government actions.²⁵⁸ Its support of Living Wage Movement Aotearoa NZ (see page 186) has helped the living wage to become part of the national discourse, with the Labour coalition government implementing a living wage.²⁵⁹ The Trust's work with the New Zealand Drug Foundation helped reframe drug reform as a health issue rather than a criminal justice issue. The Drug Foundation's executive director Ross Bell credited the Trust's funding support with changing how politicians could debate things that would have been controversial or even unthinkable a few years ago.²⁶⁰ Just Speak contributed to the Youth Court jurisdiction being raised from 16 to 18 years.²⁶¹ Finally, and two years after the Trust acknowledged it had to be more digitally savvy, ActionStation Aotearoa was funded from 2015 in a three-year campaign to build an online community of New Zealanders to work collectively to change the debate about whānau poverty and inequality. It became the fastest growing people-powered progressive campaign in Aotearoa New Zealand, and a platform for thousands of New Zealanders' voices across diverse issues.²⁶²

In addition to these organisations the J R McKenzie Trust played a leadership role in funding advocacy for impact. It provided training programmes and resources, such as the *Advocacy and Lobbying Toolkit* and *Understanding Your Impact: A Guide*, to support its ngā kaikōkiri to embrace advocacy and tell their story of making a difference in their communities. The Trust also looked to create networks of advocates and grow the number of funders of advocacy. In 2019 a review of the Trust's decade of advocacy concluded:

The JRMT experience with funding advocacy has been overwhelmingly positive and it has had a national impact. The mana and credentials of JRMT as a leader in funding advocacy in Aotearoa are also clear. Used skilfully as an enabling mechanism, funding advocacy leads philanthropy into the higher impact realms of influencing public policy, systems, social norms, and hearts and minds.²⁶³

With this bold new pathway, the J R McKenzie Trust was continuing its proud legacy of leading philanthropy in Aotearoa New Zealand.



J R McKenzie Trust

See Here

The earliest example of the impact of proactive advocacy was the See Here project run by the J R McKenzie Trust from 2006 to 2011 to improve outcomes for children with correctable vision loss.

See Here arose from a discussion in 2005 with the J R McKenzie Youth Education Fund, which was seeing a large increase in the number of requests to fund children's prescription glasses. The J R McKenzie Trust decided to explore why. In 2006, See Here became a project created and managed by the Trust to improve access to services for children with mild to moderate, correctable vision loss. It contracted a part-time project manager, Janet Digby, and created a steering group of professionals, academics and a parents' advocacy group.²⁸⁴

See Here commissioned comprehensive research and developed an evidence-based case on what was happening, including low awareness of the government spectacle subsidy available for children, its impact on children and families and what needed to change.²⁸⁵ Among other things, the Trust funded information in multiple languages to raise family awareness of this subsidy, which led to a significant government budget blowout as families' uptake of the subsidy rocketed, and a resulting increase in the budget. See Here invested considerable time to build consensus across the sector, and take up issues and build a strong relationship with government decision makers.²⁸⁶ It resulted in a number of changes to policy and practice to reduce inequalities in the identification and treatment of children with vision loss. These included improved protocols for vision screening, standardised and high-quality information for families to help them understand their children's screening results and the action they needed to take and agreements between the ministries of Health and Education to

collaborate on appropriate referral pathways for children with learning and behaviour problems.²⁸⁷

While not every See Here recommendation was implemented by the project's conclusion in 2011, and mindful 'that policy change and social change takes time', the gains made were considered a significant achievement for the \$500,000 spent on this five-year project.²⁸⁸



Child Poverty Monitor

The Child Poverty Monitor, reporting on child and family poverty and its social impact, has altered public perceptions of the causes of poverty and contributed to government action.

In 2013 the J R McKenzie Trust partnered with the Office of the Children's Commissioner and the University of Otago to release its first annual Child Poverty Monitor as a reminder to government and society. This partnership was in response to the Expert Advisory Group on Solutions to Child Poverty, established by the Children's Commissioner in 2012, recommending robust and regular measurements of poverty measures to set targets and measure progress towards addressing child poverty. The Child Poverty Monitor, through building evidence for change, combined a respected philanthropic body, the academic credibility of the University of Otago and an independent Crown entity to bring child wellbeing to the fore in Aotearoa New Zealand. The J R McKenzie Trust had long supported the Child Poverty Action Group, but here was an opportunity to advocate on the issue through rigorous analysis of the state's own statistics. 'Funding the Child Poverty Monitor was an incredibly brave move by a Trust, and precisely the role that family philanthropy can play deftly and adroitly, it was the right thing to do,' believes past trustee Jenny Gill. 'It gives the Child Poverty Monitor a perceived level of independence.'²⁸⁹

A 2017 review of the Child Poverty Monitor concluded it had become an authoritative measure of child poverty, accepted by politicians and influencers such as advocates and the media, and significantly, helped to shift public attitudes from blame to empathy as it revealed that child poverty was not a choice, but the result of structural inequality. The review pointed to the 2017 Labour coalition government's commitment to reduce child poverty, indeed Prime Minister Jacinda Ardern would take this portfolio.²⁹⁰

Since 2017, the Child Poverty Monitor has continued its robust advocacy and will do so until satisfied that government frameworks are sufficiently rigorous to replace it. 'Big, bold, permanent change needed to reduce child poverty' was the headline of the 2019 report, with Children's Commissioner Andrew Becroft concluding, 'One-offs aren't going to cut it anymore.'²⁹¹ Making the biggest difference in the lives of our most vulnerable Kiwi kids would require more than free Weet-Bix for breakfast and lunches at school, but sustained and systematic social change.

The J R McKenzie Trust's advocacy for impact, such as the Child Poverty Monitor, ensures that large social issues, such as child and family poverty and the underlying structural causes, are in front of politicians and the public.



Child Poverty Monitor 2020.
The Children's Commission, University of
Otago and J R McKenzie Trust



Child Poverty Action Group's
Susan St John with then Labour
spokesperson Jacinda Ardern, 2014.
J R McKenzie Trust



Living Wage Movement

How to build a united voice across society around the impact of growing poverty and inequality on workers, their families and their communities has been the challenge of the living wage movement. Since 2015 the J R McKenzie Trust has funded Living Wage Movement Aotearoa NZ to facilitate a public conversation for the living wage (\$22.75 in 2020) to enable workers to live with dignity and participate as active citizens in Aotearoa New Zealand.

The living wage concept emerged as a response to growing poverty and inequality that continued to hold back so many Kiwi workers, their families and the economy. The concept is simple — it's the hourly wage a worker needs to be able to pay for the necessities of life and participate as an active citizen in the community. It reflects the basic expenses of workers and their families, such as food, transportation, housing and childcare. The first living wage campaign was launched in 2012 in Auckland and Wellington, followed by other local networks around the country. In 2013, an incorporated society was formed, with

Living wage campaigner
in 2015.
Living Wage Movement
Aotearoa New Zealand

a governance body and membership of faith-based religious groups, unions, community and secular groups. In the same year, independent research by the Family Centre Social Policy Unit established the first living wage rate for New Zealand, \$18.40 per hour.²⁹²

In 2015, with research showing that 40 per cent of children living in poverty were in households where at least one adult was in full-time work or self-employed, the J R McKenzie Trust began funding Living Wage Movement Aotearoa NZ to employ two half-time community organisers in Wellington and Auckland to facilitate a conversation around the living wage with migrants, New Zealanders from refugee background, unions, women, churches and marae. It paid immediate dividends, most publicly when the Wellington City Council voted in 2015 to pay its staff and contracted workers the living wage.²⁹³

Since 2015, the J R McKenzie Trust has contributed \$500,000 to Living Wage Movement Aotearoa NZ to recruit over 200 registered living wage employers, including companies, non-government organisations, schools, councils and political parties. In 2018, the Labour coalition government adopted a living wage for all government employees and government contractors from 2020.²⁹⁴ In December 2020, the Trust announced it would support Living Wage Movement Aotearoa NZ with \$225,000 over three years.

The J R McKenzie Trust is a living wage employer, ensuring it lives its values of social justice, and models its vision of a socially just and inclusive Aotearoa New Zealand. Its relationship with Living Wage Movement Aotearoa NZ is a seminal example of how advocacy for impact can change the social landscape.

The J R McKenzie Trust is a living wage employer, ensuring it lives its values of social justice, and models its vision of a socially just and inclusive Aotearoa New Zealand.



The board and staff strategy review hui in 2019 was joined by an expert panel, and Jenny Gill also provided the hui with the benefit of her decades of leadership in philanthropy and connection to J R McKenzie Trust.

Seated: Manaia King (chair), Jenny Gill, Hayden Wano (CEO Tui Ora), Robyn Scott (executive director), Shamubeel Eaqub (economist from Sense Partners), Associate Professor Damon Salesa (Pro Vice-Chancellor Pacific, University of Auckland) and Judge Andrew Becroft (Children's Commissioner)

Middle row: Eileen Kelly (grants advisor/programme manager), Jerry Norman (Rotary 9910), Joan Smith (deputy chair, Rotary 9940), Christine Scott (Rotary 9920), Beverley Richards (operations manager), Jane Montgomery (Rotary 9970), Paula Thérèse King (NZ Medical Association) and Marama Tākao (Pou Ārahi)

Back row: Jay Farris (co-opted trustee), Aiolupotea Lili Tuioti (co-opted trustee), Dr Chelsea Grootveld (co-opted trustee), Melissa Campbell (Rotary 9930), Christopher McKenzie (McKenzie family trustee), Jonathan Usher (Rotary 9980) and Anna Gibson (McKenzie family trustee).

J R McKenzie Trust

Ka mua ka muri: Looking back to look forward

The J R McKenzie Trust underwent a period of reflection, research and review in 2019 in preparation for its next ten-year strategy.²⁶⁴ With a group of experts, it explored how philanthropy could respond to changing social needs, and how to identify the Trust's enduring values, practices and future priorities.²⁶⁵ It also commissioned in-depth research to gain deeper insight into philanthropy, not only for itself, but also for its partner organisations and the sector. This included the report *Voice, Influence, Action: Funding Advocacy for Impact*, while *The Philanthropic Landscape: A Review of Trends and Contemporary Practices* provided an overview of the philanthropic landscape in Aotearoa New Zealand and worldwide. Finally, an analysis of 131 responsive grants made between 2013 and 2019, together with feedback from 33 supported groups about their experience of working with the Trust, provided valuable insights.²⁶⁶ The feedback from Lifewise, an Auckland-based community social development organisation, went to the heart of the Trust's ethos: 'The J R McKenzie Trust has allowed us the flexibility to be bold and explore what really works for the communities we work for. The J R McKenzie Trust is the gardener, nurturing the earth and seedlings that it sees the promise in, and our garden is starting to blossom.'²⁶⁷ It revealed that the kūmara



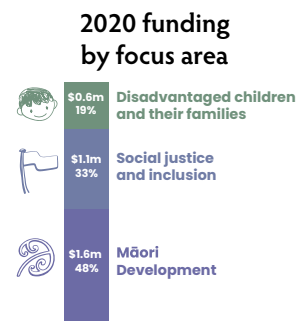
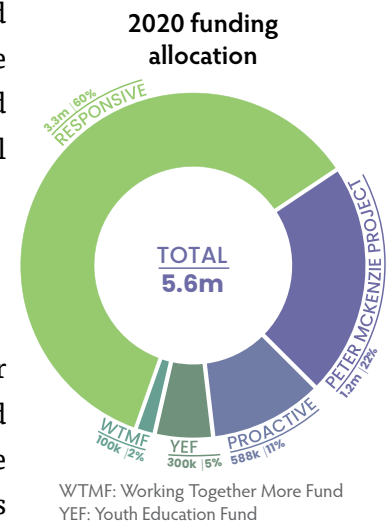
vine identity and whakataukī embraced 21 years earlier was as relevant as ever for the Trust.

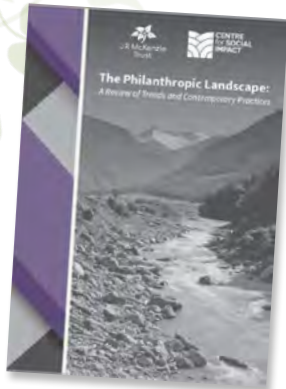
This intensive period of reflection provided valuable insights for the next 10-year strategy. Most valuable was the realisation of how much the Trust had changed; significantly, its shift from supporting disparate groups that shared its vision of a socially just and inclusive Aotearoa New Zealand, to a cohesive strategy of leveraging the activities of different groups to create connected outcomes. In short, strategic funding was leading to transformational structural change across New Zealand’s socio-ecological system —individual, whānau and community — and its supported groups were collectively making a difference towards the achievement of its vision.²⁶⁸ Within 20 years the J R McKenzie Trust had gone from a tactical grant-maker to a strategic funder of positive social impact.

The Trust at 80

By 2020, the annual grants from the J R McKenzie Trust and the Jayar Charitable Trust (with combined assets of over \$121 million) to supported groups and projects was \$5.6 million, double the amount of a decade earlier.²⁶⁹ As always, what was most important, was the significant results achieved in partnership with ngā kaikōkiri, the collective mahi towards the vision of a socially just and inclusive Aotearoa, and the mana of the J R McKenzie Trust in the community. There was much to celebrate as the Trust reached its 80th anniversary in March 2020.

Celebrations were interrupted by the most tumultuous international event since the Second World War — the Covid-19 pandemic. The modern flexible working style that already existed at the J R McKenzie Trust meant it was well placed to work remotely during the ten-week nationwide lockdown from March to May 2020. Significantly, Covid-19 placed unique additional pressures on communities throughout Aotearoa and these fell inequitably on the most vulnerable in society. The Trust quickly mobilised to support its groups to lead effective community responses by offering funding flexibility and continuity. The speed of support reinforced the importance of nurturing strong partnerships with ngā kaikōkiri.²⁷⁰





J R McKenzie Trust

The new 10-year plan, *Te Anga Rautaki*, released in December 2020 (discussed in the following chapter), with its singular priority of advancing equity through transformational change and system-focused solutions, was the culmination of the strategic shift over the last decade. While the J R McKenzie Trust would continue to have a strong focus on Māori, children, young people and whānau, this priority would see a focus on partnering and enabling other communities that experience the greatest inequity, exclusion and disadvantage, such as Pasifika and other excluded communities. At its heart was the Trust’s wairua of showing aroha to the vulnerable, its partnerships with the groups it supports, of being courageous with its community-centred approach and learning from the mahi of ngā kaikōkiri to achieve transformational change. With *Te Anga Rautaki* the 80-year-old J R McKenzie Trust was positioned to continue its proud legacy of blazing a trail to achieve its moemoeā (vision) of ‘Kia hua mai he whenua ka toko i te tika me to pono hei korowai mō Aotearoa: A socially just and inclusive Aotearoa New Zealand’.²⁷¹

While social enterprise is a growing phenomenon in Aotearoa, Māori bring a values-led, future-facing and sustainability-focused kaupapa. Tūhoe Tuawhenua Trust utilised its precious bush-clad lands around Ruatāhuna to create a honey business, Manawa Honey, and a new income stream to provide for social and community initiatives for their people. J R McKenzie Trust



**“Some things haven’t changed:
The Board is still guided by the
McKenzie legacy of generosity; it is
our responsibility to apply the spirit
of that legacy to today’s world.”**



“The J R McKenzie Trust’s new strategy, *Te Anga Rautaki*, is the latest expression of the giving philosophy ... grounded in respect for the mana and mahi of the organisations and communities it supports.”





Epilogue

Looking forward

“The J R McKenzie Trust’s new strategy, *Te Anga Rautaki*, is the latest expression of the giving philosophy developed over the last 80 years by the McKenzie family; a philosophy grounded in respect for the mana and mahi of the organisations and communities it supports.”

Manaia King and Robyn Scott, 2020²⁹⁵

The J R McKenzie Trust’s strategy for 2021 to 2030, *Te Anga Rautaki*, builds on the Trust’s legacy of showing aroha to the vulnerable, being bold in its community-centred approach and learning from the mahi and mana of ngā kaikōkiri to achieve social change for good. It is a courageous strategy that inspires the Trust to continue to provide leadership to create *kia hua mai he whenua ka toko i te tika me to pono hei korowai mō Aotearoa*: a socially just and inclusive Aotearoa New Zealand.

A strategy for the future

Since its establishment 80 years ago, the Trust has developed a distinct identity and a ‘giving philosophy’ that was steered by Sir John and Sir Roy McKenzie and has been shaped further by subsequent generations of the McKenzie family. Its current strategy, *Te Anga Rautaki*, is the latest expression of its philosophy, one that is grounded in evidence and experience, and a respect for the organisations and communities it supports.

Understanding the current pressing issues in society was at the heart of the strategy review process, which entailed collecting evidence on the root causes of inequity and exclusion. These include intergenerational impacts of colonisation; racism, discrimination, stigma and bias; a lack of visibility, representation and decision-making power; systems, policies and services that do not reflect real lives, needs and different world views; exclusion from civic participation; lack of employment opportunities and inadequate income that excludes people from opportunities such as housing or education; and barriers to services and social support. The Trust seeks to make a difference in these areas by focusing on issues of equity

and social justice, working to change the issues that hold problems in place and sharing its power with communities while using its institutional voice to influence change to ensure philanthropic practice is more responsive to tangata whenua and indigenous practices. Finally, it aims to benefit communities by adopting a range of funding approaches, staying flexible and using shared learning to make informed decisions. These values and aims are the fundamentals of *Te Anga Rautaki*. At the time of writing, the ongoing impact of Covid-19 has further exposed this social inequality, its socio-economic threat to all of Aotearoa New Zealand and the real need for transformational change.²⁹⁶

Towards a socially just and inclusive Aotearoa New Zealand

In 2040, the same year Aotearoa New Zealand will mark the bicentennial of the Treaty of Waitangi, the J R McKenzie Trust will celebrate its centennial. What might the country look like then? And how to create a socially just and inclusive Aotearoa New Zealand?



Community Housing Aotearoa (CHA), a peak body for the community housing sector in Aotearoa New Zealand, has a vision of 'all New Zealanders being well housed' as a basic human right.

Community Housing Aotearoa

Te Anga Rautaki Strategy 2021–2030

Our new strategy, Te Anga Rautaki, is the latest expression of the giving philosophy developed over the last 80 years by the McKenzie family; a philosophy grounded in respect for the mana and mahi of the organisations and communities it supports.

Our funding approach

Ngā kaikōkiri are the people who champion, promote, advocate and lead together with their communities. Our funding partnerships with ngā kaikōkiri are relational, flexible, strategic and mana-enhancing.

Below are some of the things we consider in our funding decision-making process.

- Our values are aligned and we share a desire for a high trust relationship with ngā kaikōkiri
- We value relationships before resources
- It is clear how communities had input into the initiative, and how it will continue to involve them and respond to their aspirations
- Ngā kaikōkiri may be working collaboratively
- There are clear signs of readiness for the initiative and its impact
- Ngā kaikōkiri intended outcomes and impact of the initiative align with those of the J R McKenzie Trust

Our funding tools

- **Quick Response Grants**
Funding quickly to keep momentum and respond to time-sensitive opportunities
- **Seed Funding**
Seeding new ideas and testing innovation, including social enterprise initiatives
- **Impact Funding**
Long-term funding surety for ngā kaikōkiri with whom we have trusted relationships
- **Cohort Funding**
Intentional funding of groups or clusters of ngā kaikōkiri

The way we work

We work with ngā kaikōkiri and invest in ways that advance equity through transformational change and system-focused solutions.

We focus on four pou / communities that often intersect:

- Children, young people and whānau
- Māori
- Pacific Peoples
- Communities that experience exclusion

Our Vision

A socially just and inclusive
Aotearoa New Zealand

Kia hua mai he whenua ka toko i te tika
Me to pono hei korowai mō Aotearoa

The impact we want to see

- More connected communities**
 Stronger connections and relationships within and among communities and ecosystems
- More inclusive decision-making**
 Power is shared so that communities are able to be self-determining and participate equitably in decision-making about issues that affect them
- Equitable access to resources**
 Communities have fairer access to the resources that they need to achieve equitable social and environmental outcomes
- Increased capacity for transformational change**
 More effective social change practices and communities have greater capacity and capability to lead change
- Equitable public policies**
 Effective policy and legislation that is designed to address the underlying structural causes of inequality and exclusion



Since 1940, the world has seen its population expand from 2.3 to 7.7 billion, the rise of international travel and the uptake of digital technology, and, in 2020, as a result of Covid-19, the previously unthinkable closure of international borders and life in virtual bubbles. New Zealand communities are changing as our population grows, ages and becomes more diverse. It increased from 1.6 million in 1940 to 5 million today and is expected to grow to 7 million by the middle of this century: the Māori population to more than one million, Pasifika above 650,000, and the Asian ethnic population upwards of 1.4 million.²⁹⁷ How people connect and contribute is also changing. The first computers came online during the Second World

War, and in the future digital technology will continue to be a key driver creating new ways to work, connect communities and deliver services. The ever-increasing pace of modern life will require individuals and organisations in the future to be even more agile to make the most of opportunities, but also to survive.

Population growth, the ageing of the population and the ongoing impact of the digital revolution on labour markets, combined with the global threats of climate change and environmental degradation, present major challenges for

the future. In 2019 the New Zealand government broadened its budget's focus beyond economic and fiscal policy to the concept of well being, and placed this at the heart of its social policy. It is too early to either gauge its social impact or permanence given political cycles. Just as for decades, indeed more than a century in New Zealand, there have been oscillations between public and private responses to human need, there is no indication that there will be any less need for community groups and social service organisations in the future. Indeed, as the historian of voluntary welfare organisations in New Zealand concluded, 'The future is likely to see the identification of new needs and the emergence of new social service responses.'²⁹⁸ Similarly, philanthropy, including private philanthropy, will need to continue to be flexible and relevant, compassionate and courageous.

The history of the J R McKenzie Trust is an inspirational story of harnessing a munificent gift into a legacy of giving for good, and one set to continue to blaze a trail towards a socially just and inclusive Aotearoa New Zealand.

What might the J R McKenzie Trust look like in 2040? Many of the groups and issues that we met at the start of this book no longer require support today. We no longer have a citizen army, but a professional one that is constantly returning (and deploying), however in much smaller numbers compared to the Second World War. The state now contracts many more of the services of Plunket and also supports much more in the health, disability and social areas. Pipe bands and boy scouts came off the Trust's books decades ago. In 2040, many of today's supported groups and communities will no longer require the financial support of the J R McKenzie Trust, but there will be new social issues and responses. 'I hope that in 20 years time some of these bigger issues we are trying to tackle, like child poverty, have reduced as a result of the work we have done directly,' says chair Manaia King. 'As we shift towards supporting more strategic and system-level initiatives, like the work we have been funding through the Peter McKenzie Project, these are national needs, these are big projects that are designing from a system-level a completely new approach, and that excites me.'²⁹⁹

A nation with less disadvantage and inequality through the Trust 'staying true to its kaupapa and honouring the McKenzie family legacy' is the hope of executive director Robyn Scott.³⁰⁰ A number of McKenzie family members similarly expressed the hope that the Trust would continue to honour the mana and spirit of both Sir John McKenzie and Sir Roy McKenzie.

This is all in the future. What we know from the past is that the J R McKenzie Trust has continually evolved to meet the needs of the times in its quest to sustain and strengthen society. It has been a trailblazer not only in the ways it has given, but in leading giving and progressing social justice. This is the DNA of the McKenzie giving philosophy. The history of the J R McKenzie Trust is an inspirational story of harnessing a munificent gift into a legacy of giving for good, and one set to continue to blaze a trail towards a socially just and inclusive Aotearoa New Zealand.

Wesley Community Action works in communities throughout Wellington to help people create better lives for themselves and their whānau.
Wesley Community Action





Trustees & staff
1940–2021



Trustees & staff 1940–2021

Key to abbreviations

- — no information
- CJ: Chief Justice
- GG: Governor-General
- RNZD: Rotary NZ District
- RC: Rotary Club
- RD: Rotary District
- MANZ: Medical Association of NZ
- NZBMA: NZ Branch of the British Medical Association
- NZLS: NZ Law Society
- NZMA: NZ Medical Association



J R McKenzie (right) with John Barton, Sir Alexander Roberts (centre) and Alfred Duncan, c. 1940.

Alexander Turnbull Library

1940

Chair & GG nominee, John Barton
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
 RNZD 53, David Ewen
 RC Auckland, Charles Grierson
 RC Wellington, Ernst Hay
 RC Christchurch, Leslie Averill
 RC Dunedin, Carl Smith
Rotary organisations, James Thomson
CJ nominee, Claude Weston
NZBMA nominee, Fred Bowerbank
Administrator, Ernest Jones

1941

Chair & GG nominee, John Barton
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
 RNZD 53, David Ewen / William Thomas
 RC Auckland, Charles Grierson
 RC Wellington, Frank Jones
 RC Christchurch, Robert Beveridge
 RC Dunedin, Carl Smith
CJ nominee, Claude Weston
NZBMA nominee, Fred Bowerbank
Administrator, Ernest Jones

1942

Chair & GG nominee, John Barton
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
 RNZD, —
 RC Auckland, Guy Hansard (RC Wgtn, proxy)
 RC Wellington, Albert Cramond
 RC Christchurch, —
 RC Dunedin, David Ewen
CJ nominee, Claude Weston
NZBMA nominee, Fred Bowerbank
Administrator, Ernest Jones

1943

Chair & GG nominee, John Barton
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
 RNZD 53, —
 RC Auckland, Guy Hansard (proxy)
 RC Wellington, Bill Phillips
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
CJ nominee, Claude Weston
NZBMA nominee, Fred Bowerbank
Administrator, Ernest Jones

1944

Chair & GG nominee, John Barton
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
 RNZD 53, —
 RC Auckland, Guy Hansard (proxy)
 RC Wellington, —
 RC Christchurch, William Fernie
 RC Dunedin, Charles Greenslade
CJ nominee, Claude Weston
NZBMA nominee, Fred Bowerbank
Administrator, Ernest Jones

1945

Chair & GG nominee, John Barton
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
 RNZD 53, —
 RC Auckland, Guy Hansard (proxy)
 RC Wellington, Vernon Edgar
 RC Christchurch, William Fernie
 RC Dunedin, Charles Greenslade /
 H S Wilkinson
CJ nominee, Claude Weston
NZBMA nominee, Fred Bowerbank
Administrator, Ernest Jones

1946

Chair & GG nominee, John Barton
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 53, —
 RC Auckland, Guy Hansard (proxy)
 RC Wellington, —
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
 CJ nominee, Claude Weston
 NZBMA nominee, Sir Fred Bowerbank
 Administrator, Ernest Jones

1947

Chair & GG nominee, John Barton
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 52, Blair Tennent
 RD 53, —
 RC Auckland, Guy Hansard (proxy)
 RC Wellington, —
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
 CJ nominee, Wilfred Sim
 NZBMA nominee, Sir Fred Bowerbank
 Administrator, Ernest Jones

1948

Chair & GG nominee, John Barton
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 52, —
 RD 53, Charles Greenslade (Dunedin(DN))
 RC Auckland, Howard Lawry
 RC Wellington, —
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
 CJ nominee, Wilfred Sim
 NZBMA nominee, Sir Fred Bowerbank
 Administrator, Ernest Jones

1949

Chair & GG nominee, John Barton
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 39, —
 RD 40, —
 RC Auckland, —
 RC Wellington, —
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
 CJ nominee, Wilfred Sim
 NZBMA nominee, Sir Fred Bowerbank
 Administrator, Ernest Jones

1950

Chair & GG nominee, John Barton
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 39, —
 RD 40, —
 RC Auckland, —
 RC Wellington, —
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
 CJ nominee, Wilfred Sim
 NZBMA nominee, Sir Fred Bowerbank
 Administrator, Ernest Jones

1951

Chair & GG nominee, John Barton
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 39, John Ilott (RC Wgtn, proxy)
 RD 40, —
 RC Auckland, —
 RC Wellington, —
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 NZBMA nominee, Sir Fred Bowerbank
 Administrator, Ernest Jones

1952

Chair & GG nominee, John Barton
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 39, John Ilott (proxy)
 RD 40, —
 RC Auckland, —
 RC Wellington, —
 RC Christchurch, —
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 NZBMA nominee, Sir Fred Bowerbank
 Administrator, Ernest Jones

1953

Chair & GG nominee, John Barton
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
RD 39, John Ilott (proxy)
RD 40, —
RC Auckland, George Hartshorn
RC Wellington, —
RC Christchurch, William McDonald
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Sir Fred Bowerbank
Administrator, Ernest Jones

1954

Chair & GG nominee, John Barton /
Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
RD 39, Sir John Ilott (proxy)
RD 40, —
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, William McDonald
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Sir Fred Bowerbank
Secretary, Clarence Meachen

1955

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
RD 39, Gordon McDowell
RD 40, William Martin
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, William McDonald
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Sir Fred Bowerbank /
Duncan Stout
Secretary, Clarence Meachen

1956

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
RD 38, Edward Marshall
RD 39, Stuart Hayton
RD 40, Robert Macauley
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, William McDonald
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Duncan Stout
Secretary, Clarence Meachen

1957

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
RD 292, Anthony Morcom Green
RD 294, George Millward
RD 298, Malcom Leadbetter
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, William McDonald
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Duncan Stout
Secretary, Clarence Meachen

1958

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Sir Alexander Roberts
RD 292, John Ledgerwood
RD 294, George Kerslake
RD 298, Alfred Newall
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, William McDonald
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Duncan Stout
Secretary, Clarence Meachen

1959

Chair & GG nominee, Sir John Ilott
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 292, John Craig
 RD 294, George Millward
 RD 298, Ian Cottrell
 RC Auckland, George Hartshorn
 RC Wellington, Frank Drewitt
 RC Christchurch, William McDonald
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 NZBMA nominee, Duncan Stout
 Secretary, Clarence Meachen

1960

Chair & GG nominee, Sir John Ilott
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Sir Alexander Roberts
 RD 292, Ralph Vernon
 RD 294, Alan Brown
 RD 298, Bill Hall-Watson
 RC Auckland, George Hartshorn
 RC Wellington, Frank Drewitt
 RC Christchurch, William McDonald
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 NZBMA nominee, Duncan Stout
 Secretary, Clarence Meachen

1961

Chair & GG nominee, Sir John Ilott
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Hugh Carter
 RD 292, Ernest Thomas
 RD 294, Christian Nyberg
 RD 298, Alfred Walmsley
 RC Auckland, George Hartshorn
 RC Wellington, Frank Drewitt
 RC Christchurch, William McDonald
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 NZBMA nominee, Duncan Stout
 Secretary, Clarence Meachen

1962

Chair & GG nominee, Sir John Ilott
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Hugh Carter
 RD 292, George Drake
 RD 294, Frederick Beattie
 RD 298, Brian Bendall
 RC Auckland, George Hartshorn
 RC Wellington, Frank Drewitt
 RC Christchurch, Albert Hartnell
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 NZBMA nominee, Sir Duncan Stout
 Secretary, Clarence Meachen



J R McKenzie Trust board in 1958.

Seated: Sir Wilfred Sim, Sir Alexander Roberts, Sir John Ilott (chair), Alfred Duncan, Roy McKenzie and George Hartshorn. **Standing:** Duncan Stout, Charles Greenslade, William McDonald, Alfred Newall, George Kerslake, John Ledgerwood, Frank Drewitt and Clarence Meachen (secretary).

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1963

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Hugh Carter
RD 292, Joidah Thomas
RD 294, Edward de Joux
RD 298, James Burrows
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, Albert Hartnell
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Sir Duncan Stout
Secretary, Clarence Meachen

1964

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Hugh Carter
RD 292, Ashton Kelly
RD 294, Russell Laurenson
RD 298, Philip Blank
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, Garth Turbott
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Sir Duncan Stout
Secretary, Clarence Meachen

1965

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Hugh Carter
RD 292, Thomas Overton
RD 294, Ernest Velvin
RD 298, John Bayley
RC Auckland, George Hartshorn
RC Wellington, Frank Drewitt
RC Christchurch, Garth Turbott
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Sir Duncan Stout
Secretary, Clarence Meachen

1966

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Hugh Carter
RD 292, Leslie Colgan
RD 294, Philip Proctor
RD 298, Sir John Walsh
RC Auckland, Ernest Thomas
RC Wellington, Frank Drewitt
RC Christchurch, Garth Turbott
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
NZBMA nominee, Sir Duncan Stout
Secretary, Clarence Meachen

1967

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Hugh Carter
RD 292, Robert Porter
RD 294, Winston Bassett
RD 298, Terry McCombs
RC Auckland, Ernest Thomas
RC Wellington, Frank Drewitt
RC Christchurch, Garth Turbott
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
MANZ nominee, Sir Duncan Stout
Secretary, Clarence Meachen

1968

Chair & GG nominee, Sir John Ilott
McKenzie family, Roy McKenzie
Personal trustee, Alfred Duncan
Personal trustee, Hugh Carter
RD 292, Albert Dreaver
RD 294, Robert Dockery
RD 298, Rutherford Brown
RC Auckland, Ernest Thomas
RC Wellington, Frank Drewitt
RC Christchurch, Garth Turbott
RC Dunedin, Charles Greenslade
CJ nominee, Sir Wilfred Sim
MANZ nominee, Sir Duncan Stout
Secretary, Clarence Meachen

1969

Chair & GG nominee, Sir John Ilott
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Hugh Carter
 RD 292, Hubert Lichtenstein
 RD 294, Stanley Ramson
 RD 298, Stewart Ombler
 RC Auckland, Ernest Thomas
 RC Wellington, Frank Drewitt
 RC Christchurch, Jack Kerr
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 MANZ nominee, Sir Duncan Stout
 Secretary, Clarence Meachen

1970

Chair & GG nominee, Sir John Ilott
 McKenzie family, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, Hugh Carter
 RD 292, Peter Rigg
 RD 293, Ian Drabble
 RD 294, Alex Irvine
 RD 298, Dudley Wilson
 RC Auckland, Ernest Thomas
 RC Wellington, Frank Drewitt
 RC Christchurch, Jack Kerr
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 MANZ nominee, Sir Duncan Stout
 Secretary, Clarence Meachen

1971

Chair & GG nominee, Sir John Ilott
 (until Oct)
 Chair & GG nominee, Roy McKenzie
 (from Oct)
 Personal trustee, Alfred Duncan
 Personal trustee, William Gee Taylor
 RD 292, Robert Yarnton
 RD 293, Ian Drabble
 RD 294, Rex Weber
 RD 298, Harold Poole
 RC Auckland, Ernest Thomas
 RC Wellington, Frank Drewitt
 RC Christchurch, Jack Kerr
 RC Dunedin, Charles Greenslade
 CJ nominee, Sir Wilfred Sim
 MANZ nominee, Sir Duncan Stout
 Secretary, Clarence Meachen

1972

Chair & GG nominee, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, William Gee Taylor
 RD 292, Robert Reeder
 RD 293, Brian Bradshaw
 RD 294, Ron Greenwood
 RD 298, Bruce Patchett
 RC Auckland, Ernest Thomas
 RC Hamilton, Ian Drabble
 RC Wellington, Frank Drewitt
 RC Christchurch, Jack Kerr
 RC Dunedin, Frank Evans
 CJ nominee, Sir Wilfred Sim
 MANZ nominee, Jack Dawson
 Secretary, Clarence Meachen

1973

Chair & GG nominee, Roy McKenzie
 Personal trustee, Alfred Duncan
 Personal trustee, William Gee Taylor
 RD 292, Wilf Wagener
 RD 293, Bill de Costa
 RD 294, Edward Gillies
 RD 298, James Keenan
 RC Auckland, Ernest Thomas
 RC Hamilton, Ian Drabble
 RC Wellington, Frank Drewitt
 RC Christchurch, Jack Kerr
 RC Dunedin, Frank Evans
 CJ nominee, Sir Wilfred Sim
 MANZ nominee, Jack Dawson
 Secretary, Clarence Meachen

1974

Chair / GG nominee / personal trustee,
 Roy McKenzie
 Personal trustee, William Gee Taylor
 RD 292, John Rae
 RD 293, Graeme Lee
 RD 294, Neil Inkster
 RD 298, Ian Galloway
 RC Auckland, Ernest Thomas
 RC Hamilton, Ian Drabble
 RC Wellington, Frank Drewitt
 RC Christchurch, Jack Kerr
 RC Dunedin, Frank Evans
 CJ nominee, Sir Wilfred Sim
 MANZ nominee, Jack Dawson
 Secretary, Clarence Meachen / Neil McKay

1975

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
RD 292, Ali Asgar
RD 293, Bert Holmes
RD 294, Stuart Macaskill
RD 298, Gordon Allen
RC Auckland, Ernest Thomas
RC Hamilton, Ian Drabble
RC Wellington, Frank Drewitt
RC Christchurch, Jack Kerr
RC Dunedin, Frank Evans
NZLS nominee, Lawrence Greig
MANZ nominee, Jack Dawson
Secretary, Neil McKay

1976

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
RD 292, Grattan O'Connell
RD 293, John Nicholls
RD 294, Robert Mills
RD 298, Eric Highet
RC Auckland, Ernest Thomas
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Jack Kerr
RC Dunedin, Frank Evans
NZLS nominee, Lawrence Greig
NZMA nominee, Jack Dawson
Secretary, Neil McKay

1977

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
RD 992, Peter Taylor
RD 993, Leighton Patmore
RD 994, Alan Hercus
RD 998, Frank Howe
RC Auckland, Ernest Thomas
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Jack Kerr
RC Dunedin, Frank Evans
NZLS nominee, Lawrence Greig
NZMA nominee, Jack Dawson
Secretary, Neil McKay

1978

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
RD 992, Clifford Dickey
RD 993, Neville Dyer
RD 994, Ewen Sinclair
RD 998, James Travers
RC Auckland, Ernest Thomas
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Jack Kerr
RC Dunedin, Sandy Macalister
NZLS nominee, Lawrence Greig
NZMA nominee, Jack Dawson
Secretary, Neil McKay

J R McKenzie Trust board in 1977.

Seated: Lawrence Grieg, Ernest Thomas, Neil McKay (secretary), Roy McKenzie (chair), Ian Cottrell (by invitation), Frank Drewitt and Clarence Meachen (by invitation). **Standing:** Jim Boon, Frank Evans, James Travers, William Gee Taylor, Frank Howe, Alan Hercus, Jack Kerr, Peter Taylor, Leighton Patmore, Neville Dyer, Clifford Dickey, George McElwee and Dr Jack Dawson.

J R McKenzie Trust



1979

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
RD 992, Des Stewart
RD 993, Bill Lockyer
RD 994, Doug Sheehy
RD 998, Richard Ayton
RC Auckland, Ernest Thomas
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Jack Kerr
RC Dunedin, Sandy Macalister
NZLS nominee, Lawrence Greig
NZMA nominee, Jack Dawson
Secretary, Neil McKay

1980

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
RD 992, Hugh Francis
RD 993, Garth Button
RD 994, Bill Carthew
RD 998, Fraser Morrison
RC Auckland, David Ellis
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Noel Bradford
RC Dunedin, Sandy Macalister
NZLS nominee, David Hurley
NZMA nominee, Jack Dawson
Secretary, Neil McKay

1981

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
RD 992, Melvyn Cooper
RD 993, Rex White
RD 994, Michael Leggott
RD 997, Owen McDowell
RD 998, George Armstrong
RC Auckland, David Ellis
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Noel Bradford
RC Dunedin, Sandy Macalister
NZLS nominee, David Hurley
NZMA nominee, Jack Dawson
Secretary, Neil McKay

1982

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, William Gee Taylor
Personal trustee, John McKenzie
RD 992, Ned Lenthall
RD 993, Jack Dunlop
RD 994, Stewart Frame
RD 997, Tom Hurford
RD 998, Jim McKenzie
RC Auckland, David Ellis
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Noel Bradford
RC Dunedin, Sandy Macalister
NZLS nominee, David Hurley
NZMA nominee, Trevor Gebbie
Secretary, Neil McKay

1983

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, John McKenzie
RD 992, David Ellis
RD 993, John Webb
RD 994, Bill Boyd
RD 997, John Hurst
RD 998, Lou Robinson
RC Auckland, David Ellis
RC Hamilton, George McElwee
RC Wellington, Frank Drewitt
RC Christchurch, Noel Bradford
RC Dunedin, Sandy Macalister
NZLS nominee, David Hurley
NZMA nominee, Trevor Gebbie
Co-opted, Diana Crossan
Co-opted, Margaret Lythgoe
Secretary, Neil McKay

1984

Chair / GG nominee / personal trustee,
Roy McKenzie

Personal trustee, John McKenzie
RD 991, Ronald Trotman
RD 992, David Ellis
RD 993, John Webb
RD 994, Bill Boyd
RD 997, John Hurst
RD 998, Lou Robinson
RC Auckland, David Ellis
RC Hamilton, George McElwee
RC Wellington, Wayne Nyberg
RC Christchurch, Noel Bradford
RC Dunedin, Sandy Macalister

NZLS nominee, David Hurley
 NZMA nominee, Trevor Gebbie
 Co-opted, Diana Crossan
 Co-opted, Margaret Lythgoe
 Secretary, Neil McKay

1985

Chair / GG nominee / personal trustee,
 Roy McKenzie
 Personal trustee, John McKenzie
 RD 991, Ken Winter
 RD 992, Graham Bishop
 RD 993, Brian Burmester
 RD 994, Fred Burns
 RD 997, Colin East
 RD 998, Doug Graham
 RC Auckland, David Ellis
 RC Hamilton, Ton Haak
 RC Wellington, Wayne Nyberg
 RC Christchurch, Jack Mann
 RC Dunedin, Sandy Macalister
 NZLS nominee, David Hurley
 NZMA nominee, Trevor Gebbie
 Co-opted, Diana Crossan
 Co-opted, Margaret Lythgoe
 Secretary, Neil McKay
 Assistant, Maureen Ramsey

1986

Chair / GG nominee / personal trustee,
 Roy McKenzie
 Personal trustee, John McKenzie
 RD 991, Don McAllister
 RD 992, Ross Craig
 RD 993, Chas Woolley
 RD 994, Ross George
 RD 997, Gerald Austin
 RD 998, Mike Orbell

RC Auckland, Doug Brown
 RC Hamilton, Ton Haak
 RC Wellington, Wayne Nyberg
 RC Christchurch, Jack Mann
 RC Dunedin, Sandy Macalister
 NZLS nominee, David Hurley
 NZMA nominee, Trevor Gebbie
 Co-opted, Diana Crossan
 Co-opted, Hazel Ross
 Co-opted, Tūroa Royal
 Secretary, Neil McKay
 Assistant, Maureen Ramsey

1987

Chair / GG nominee / personal trustee,
 Roy McKenzie (until Nov)
 Chair / GG nominee / NZLS nominee,
 David Hurley (from Nov)
 Personal trustee, John McKenzie
 RD 991, David Graham
 RD 992, Don Currey
 RD 993, Tony Ryan
 RD 994, Hamilton Kinvig
 RD 997, Murray Anderson
 RD 998, Ewan McKenzie
 RC Auckland, Doug Brown
 RC Hamilton, Ton Haak
 RC Wellington, Wayne Nyberg
 RC Christchurch, Jack Mann
 RC Dunedin, Sandy Macalister
 NZMA nominee, Bruce Morrison
 Co-opted, Diana Crossan
 Co-opted, Hazel Ross
 Co-opted, Tūroa Royal
 Secretary, Lesley Newman (later Carmichael)
 Assistant, Maureen Ramsey

J R McKenzie Trust board in 1985. **Seated:** Prof. Sandy Macalister, Diana Crossan, Roy McKenzie (chair), Neil McKay (secretary) and David Ellis. **Standing:** David Hurley, Ken Winter, Wayne Nyberg, Doug Graham, Brian Burmester, Fred Burns, Margaret Lythgoe, Ton Haak, Colin East, John McKenzie, Graham Bishop, Trevor Gebbie and Dr Jack Mann.
 J R McKenzie Trust



1988**Chair / GG nominee / NZLS nominee,**

David Hurley

Personal trustee, Roy McKenzie**Personal trustee,** John McKenzie

RD 991, Ken Baird

RD 992, Noel Holyoake

RD 993, Jim Ross

RD 994, Alastair Osborn

RD 997, Ellis Buchanan

RD 998, David Gamble

RC Auckland, Doug Brown

RC Hamilton, Ton Haak

RC Wellington, Wayne Nyberg

RC Christchurch, Jack Mann

RC Dunedin, Sandy Macalister

NZMA nominee, Bruce Morrison

Co-opted, Diana Crossan

Co-opted, Jenny Gill

Co-opted, Tūroa Royal

*Secretary, Lesley Newman**Assistant, Maureen Ramsey***1989****Chair / GG nominee / NZLS nominee,**

David Hurley

Personal trustee, Sir Roy McKenzie**Personal trustee,** John McKenzie

RD 991, Leo Dixon

RD 992, Bruce Robinson

RD 993, Jim Judd

RD 994, Don Spiers

RD 997, Euan Hilson

RD 998, Geoff Hall

RC Auckland, Doug Brown

RC Hamilton, Ton Haak

RC Wellington, Wayne Nyberg

RC Christchurch, George Twentyman

RC Dunedin, Stuart Melville

NZMA nominee, Bruce Morrison

Co-opted, Diana Crossan

Co-opted, Jenny Gill

Co-opted, Tūroa Royal

Co-opted, John Watson

*Secretary, Lesley Newman**Assistant, Maureen Ramsey***1990****Chair / GG nominee / NZLS nominee,**

David Hurley

Personal trustee, Sir Roy McKenzie**Personal trustee,** John McKenzie

RD 991, Stuart Batty

RD 992, Bob Jollands

RD 993, Des Price

RD 994, Bryan Ross

RD 997, Peter Roselli

RD 998, Keith Stevenson

RC Auckland, Doug Brown

RC Hamilton, Ton Haak

RC Wellington, Wayne Nyberg

RC Christchurch, George Twentyman

RC Dunedin, Stuart Melville

NZMA nominee, Bruce Morrison

Co-opted, Diana Crossan

Co-opted, Jenny Gill

Co-opted, Tūroa Royal

Co-opted, John Watson

*Secretary, Lesley Carmichael**Assistant, Maureen Ramsey***1991****Chair / GG nominee / NZLS nominee,**

David Hurley

Personal trustee, Sir Roy McKenzie**Personal trustee,** John McKenzie

RD 9910, Roger Manuel

RD 9920, Fred Angus

RD 9930, Peter Parr

RD 9940, Glen Caves

RD 9970, Kevin Shacklock

RD 9980, Peter Muller

RC Auckland, Peter Grayburn

RC Hamilton, Ton Haak

RC Wellington, Wayne Nyberg

RC Christchurch, George Twentyman

RC Dunedin, Stuart Melville

NZMA nominee, Bruce Morrison

Co-opted, Diana Crossan

Co-opted, Jenny Gill

Co-opted, Miriama Evans

Co-opted, Archie Taiaroa

*Secretary, Lesley Carmichael**Assistant, Maureen Ramsey***1992****Chair / GG nominee / NZLS nominee,**

David Hurley

Personal trustee, Sir Roy McKenzie**Personal trustee,** John McKenzie**Personal trustee,** Peter McKenzie

RD 9910, Jim Currie

RD 9920, Charles Goldie

RD 9930, Alan Cooper

RD 9940, Brian Chong

RD 9970, Jack Ross

RD 9980, Ron White

RC Auckland, Peter Grayburn

RC Hamilton, Murray Day
 RC Wellington, Wayne Nyberg
 RC Christchurch, George Twentyman
 RC Dunedin, Stuart Melville
 NZMA nominee, Peter Holst
 Co-opted, Diana Crossan
 Co-opted, Jenny Gill
 Co-opted, Miriama Evans
 Co-opted, Archie Taiaroa
National Secretary, Lesley Carmichael
Assistant, Maureen Ramsey

1993

Chair / GG nominee / NZLS nominee,
 David Hurley
 Personal trustee, Sir Roy McKenzie
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RD 9910, Tony Hornabrook
 RD 9920, Welly Choy
 RD 9930, Ken Hayman
 RD 9940, Dexter Bamberry
 RD 9970, Roy Chowdhury
 RD 9980, Brian Stevenson
 RC Auckland North, Leo Dixon
 RC Auckland, Peter Grayburn
 RC Hamilton, Murray Day
 RC Wellington, Wayne Nyberg
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZMA nominee, Peter Holst
 Co-opted, Diana Crossan
 Co-opted, Jenny Gill
 Co-opted, Teorongonui Josie Keelan
 Co-opted, Joe Williams
National Secretary, Lesley Carmichael
Assistant, Maureen Ramsey

1994

Chair / GG nominee / NZLS nominee,
 David Hurley
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RD 9910, Bob Baird
 RD 9920, Ron Thomas
 RD 9930, Ted Mason
 RD 9940, Eric Linklater
 RD 9970, Peter Smale
 RD 9980, Derek Bulman
 RC Auckland North, Leo Dixon
 RC Auckland, Peter Grayburn
 RC Hamilton, Murray Day
 RC Wellington, Wayne Nyberg
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZMA nominee, Peter Holst
 Co-opted, Diana Crossan
 Co-opted, Jenny Gill
 Co-opted, Teorongonui Josie Keelan
 Co-opted, Joe Williams
National Secretary, Lesley Carmichael
Assistant, Maureen Ramsey

1995

Chair / GG nominee / NZLS nominee,
 David Hurley (until Nov)
 Chair / GG nominee / co-opted,
 Diana Crossan (from Nov)
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RD 9910, David Oliver
 RD 9920, Stuart Searle
 RD 9930, Geoff Kay
 RD 9940, Duncan McKee
 RD 9970, Les Dixon
 RD 9980, Peter Haines

J R McKenzie Trust board and staff in 1990. **Seated:** John McKenzie, Jenny Gill, David Hurley (chair), Sir Roy McKenzie, Lesley Carmichael (secretary) and Doug Brown. **Standing:** Maureen Ramsey, Peter Roselli, Bryan Ross, Wayne Nyberg, George Twentyman, Ton Haak, Des Price, Stuart Batty, Bob Jollands, Keith Stevenson, Stuart Melville, Bruce Morrison and John Watson. **Absent:** Diana Crossan and Turoa Royal.

J R McKenzie Trust



RC Auckland North, Leo Dixon
 RC Auckland, Peter Grayburn
 RC Hamilton, Murray Day
 RC Wellington, Peter Smith
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZMA nominee, Peter Holst
 Co-opted, Jenny Gill
 Co-opted, Teorongonui Josie Keelan
National Secretary, Lesley Carmichael
Assistant, Maureen Ramsey

1996

Chair & GG nominee, Diana Crossan
 Personal trustee, Sir Roy McKenzie
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RC Auckland North, Leo Dixon
 RC Auckland, Ross Meadowcroft
 RC Hamilton, Murray Day
 RC Wellington, Peter Smith
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZLS nominee, Radha Balakrishnan
 NZMA nominee, Peter Holst
 Co-opted, Jenny Gill
 Co-opted, Teorongonui Josie Keelan
National Secretary, Lesley Carmichael

1997

Chair & GG nominee, Diana Crossan
 Personal trustee, Sir Roy McKenzie
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RC Auckland North, Leo Dixon
 RC Auckland, Ross Meadowcroft
 RC Hamilton, Murray Day
 RC Wellington, Peter Smith
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZLS nominee, Radha Balakrishnan
 NZMA nominee, Peter Holst
 Co-opted, Jenny Gill
 Co-opted, Teorongonui Josie Keelan
National Administrator, Lesley Carmichael
 (until May)
Executive director, Iain Hines
Administration assistant, Alison Glen

1998

Chair & GG nominee, Diana Crossan
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RC Auckland North, Leo Dixon

RC Auckland, Ross Meadowcroft
 RC Hamilton, Murray Day
 RC Wellington, Peter Smith
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZLS nominee, Radha Balakrishnan
 NZMA nominee, Peter Holst
 Co-opted, Jenny Gill
 Co-opted, Teorongonui Josie Keelan
Executive director, Iain Hines
Administration officer, Alison Glen

1999

Chair & GG nominee, Diana Crossan
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RC Auckland North, Bob Baird
 RC Auckland, Ross Meadowcroft
 RC Hamilton, Murray Day
 RC Wellington, Peter Smith
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZLS nominee, Radha Balakrishnan
 NZMA nominee, Peter Holst
 Co-opted, Jenny Gill
 Co-opted, Teorongonui Josie Keelan
Executive director, Iain Hines
Administration officer, Alison Glen

2000

Chair & GG nominee, Diana Crossan
 Personal trustee, John McKenzie
 Personal trustee, Peter McKenzie
 RC Auckland North, Bob Baird
 RC Auckland, Ross Meadowcroft
 RC Hamilton, Murray Day
 RC Wellington, Peter Smith
 RC Christchurch, Brian Palliser
 RC Dunedin, Stuart Melville
 NZLS nominee, Radha Balakrishnan
 NZMA nominee, Peter Holst
 Co-opted, Jenny Gill (Acting chair from Jun)
 Co-opted, Teorongonui Josie Keelan
Executive director, Iain Hines
Administration officer, Alison Glen

2001

Chair & GG nominee, Diana Crossan
Personal trustee, John McKenzie
Personal trustee, Peter McKenzie
RC Auckland North, Bob Baird
RC Auckland, Ross Meadowcroft
RC Hamilton, Murray Day
RC Wellington, Tricia Walbridge
RC Christchurch, Brian Palliser
RC Dunedin, Stuart Melville
NZLS nominee, Radha Balakrishnan
NZMA nominee, Peter Holst
Co-opted, Jenny Gill
Co-opted, Teorongonui Josie Keelan
Executive director, Iain Hines
Administration officer, Alison Glen

2002

Chair / NZMA nominee, Peter Holst
McKenzie family / personal trustee,
John McKenzie
McKenzie family / personal trustee,
Peter McKenzie
RC Auckland North / RD 9910, Bob Baird
RC Auckland / RD 9920, Ross Meadowcroft
RC Hamilton / RD 9930, Murray Day
RC Wellington / RD 9940, Tricia Walbridge
RC Christchurch / RD 9970, Brian Palliser
RC Dunedin / RD 9980, Stuart Melville
NZLS nominee, Radha Balakrishnan
Co-opted, Diana Crossan
Co-opted, Teorongonui Josie Keelan
Co-opted, Pania Ellison
Co-opted, Warren Lindberg
Executive director, Iain Hines
Administration officer, Alison Glen

2003

Chair / NZMA nominee, Peter Holst
McKenzie family / personal trustee,
John McKenzie
McKenzie family / personal trustee, Peter
McKenzie
RC Auckland North / RD 9910, Bob Baird
RC Auckland / RD 9920, John Spooner
RC Hamilton / RD 9930, David Wright
RC Wellington / RD 9940, Tricia Walbridge
RC Christchurch / RD 9970, Brian Palliser
RC Dunedin / RD 9980, Neville Caird
NZLS nominee, Radha Balakrishnan
Co-opted, Diana Crossan (part-year)
Co-opted, Pania Ellison
Co-opted, Warren Lindberg
Executive director, Iain Hines
Administration officer, Alison Glen

2004

Chair / NZMA nominee, Peter Holst
McKenzie family / personal trustee,
John McKenzie
McKenzie family / personal trustee,
Peter McKenzie
RC Auckland North / RD 9910, Bob Baird
RC Auckland / RD 9920, John Spooner
RC Hamilton / RD 9930, David Wright
RC Wellington / RD 9940, Tricia Walbridge
RC Christchurch / RD 9970, Brian Palliser
RC Dunedin / RD 9980, Neville Caird
NZLS nominee, Radha Balakrishnan
Co-opted, Pania Ellison
Co-opted, Warren Lindberg
Co-opted, Melita Farley
Executive director, Iain Hines
Administration officer, Alison Glen

2005

Chair / NZMA nominee, Peter Holst
McKenzie family / personal trustee,
John McKenzie
McKenzie family / personal trustee,
Peter McKenzie
RC Auckland North / RD 9910, Bob Baird
RC Auckland / RD 9920, John Spooner
RC Hamilton / RD 9930, David Wright
RC Wellington / RD 9940, Tricia Walbridge
RC Christchurch / RD 9970, Brian Palliser
RC Dunedin / RD 9980, Neville Caird
NZLS nominee, Radha Balakrishnan
Co-opted, Pania Ellison
Co-opted, Warren Lindberg
Co-opted, Darryn Russell
Personal trustee, Robyn Gibson
Executive director, Iain Hines
Administration officer, Alison Glen

2006

Chair, McKenzie family / personal trustee,
John McKenzie
McKenzie family, David Vance
RC Auckland North / RD 9910, Bob Baird
RC Auckland / RD 9920, Eric Keys
RC Hamilton / RD 9930, David Wright
RC Wellington / RD 9940, Tricia Walbridge
RC Christchurch / RD 9970, Brian Palliser / Lyn
Holmes
RC Dunedin / RD 9980, Neville Caird
NZMA nominee, Peter Holst
NZLS nominee, Radha Balakrishnan
Co-opted, Pania Ellison
Co-opted, Warren Lindberg
Co-opted, Darryn Russell
Personal trustee, Peter McKenzie

Personal trustee, Robyn Gibson
Executive director, Iain Hines
Administration officer, Alison Glen

2007

Chair / McKenzie family / personal trustee,
 John McKenzie
 McKenzie family, David Vance
 RC Auckland North / RD 9910, Bob Baird
 RC Auckland / RD 9920, Eric Keys
 RC Hamilton / RD 9930, David Wright
 RC Wellington / RD 9940, Tricia Walbridge
 RC Christchurch / RD 9970, Lyn Holmes
 RC Dunedin / RD 9980, Neville Caird
 NZLS nominee, Radha Balakrishnan
 NZMA nominee, Peter Holst
 Co-opted, Pania Ellison
 Co-opted, Warren Lindberg
 Co-opted, Darryn Russell
 Personal trustee, Peter McKenzie
 Personal trustee, Robyn Gibson
Executive director, Iain Hines
Administration officer, Alison Glen
Kaitohutohu/grants & programme advisor,
PJ Devonshire

2008

Chair / McKenzie family / personal trustee,
 John McKenzie
 McKenzie family, David Vance
 RC Auckland North / RD 9910, Bob Baird /
 Charles Wilson
 RC Auckland / RD 9920, Eric Keys
 RC Hamilton / RD 9930, David Wright / Patrick
 Cummings
 RC Wellington / RD 9940, Tricia Walbridge
 RC Christchurch / RD 9970, Lyn Holmes
 RC Dunedin / RD 9980, Neville Caird

NZLS nominee, Radha Balakrishnan
 NZMA nominee, Peter Holst
 Co-opted, Pania Ellison
 Co-opted, Warren Lindberg
 Co-opted, Darryn Russell
 Personal trustee, Peter McKenzie
 Personal trustee, Robyn Gibson
Executive director, Iain Hines
Administration officer, Alison Glen
Kaitohutohu/grants & programme advisor,
PJ Devonshire

2009

Chair / McKenzie family / personal trustee,
 John McKenzie
 McKenzie family, David Vance
 RC Auckland North / RD 9910, Charles Wilson
 RC Auckland / RD 9920, Eric Keys
 RC Hamilton / RD 9930, Patrick Cummings
 RC Wellington / RD 9940, Tricia Walbridge
 RC Christchurch / RD 9970, Lyn Holmes
 RC Dunedin / RD 9980, Neville Caird
 NZLS nominee, Radha Balakrishnan
 NZMA nominee, Julia Carr
 Co-opted, Pania Ellison
 Co-opted, Warren Lindberg
 Co-opted, Darryn Russell
 Personal trustee, Peter McKenzie
 Personal trustee, Robyn Gibson
Executive director, Iain Hines
Administration officer, Alison Glen

2010

Chair / McKenzie family / personal trustee,
 John McKenzie (until Nov)
 Chair / NZLS nominee, Radha Balakrishnan
 (from Nov)
 McKenzie family, David Vance



J R McKenzie Trust board and staff in 2001. **Seated:** Alison Glen, Iain Hines (executive director), Jenny Gill, Diana Crossan (chair), Peter Holst and Teorongonui Josie Keelan. **Standing, first row:** Tricia Walbridge, Ross Meadowcroft, John McKenzie, Brian Palliser, Murray Day and Peter McKenzie. **Standing, back row:** Bob Baird, Stuart Melville and Radha Balakrishnan.

J R MCKENZIE TRUST

McKenzie family, Christopher McKenzie (from Nov)

RC Auckland North / RD 9910, Charles Wilson

RC Auckland / RD 9920, Eric Keys

RC Hamilton / RD 9930, Patrick Cummings

RC Wellington / RD 9940, Tricia Walbridge

RC Christchurch / RD 9970, Lyn Holmes

RC Dunedin / RD 9980, Neville Caird

NZMA nominee, Julia Carr

Co-opted, Pania Ellison

Co-opted, Warren Lindberg

Co-opted, Che Wilson

Personal trustee, Peter McKenzie

Personal trustee, Robyn Gibson

Executive director, Iain Hines

Administration officer, Alison Glen

Kaitohutohu/Māori development advisor,

Marama Tākao

2011

Chair / NZLS nominee, Radha Balakrishnan

McKenzie family, David Vance

McKenzie family, Christopher McKenzie

RC Auckland North / RD 9910, Charles Wilson

RC Auckland / RD 9920, Eric Keys

RC Hamilton / RD 9930, Patrick Cummings

RC Wellington / RD 9940, Tricia Walbridge

RC Christchurch / RD 9970, Lyn Holmes

RC Dunedin / RD 9980, Neville Caird

NZMA nominee, Julia Carr

Co-opted, Pania Ellison

Co-opted, Warren Lindberg

Co-opted, Che Wilson

Personal trustee, Peter McKenzie

Personal trustee, Robyn Gibson

Executive director, Iain Hines

Administration officer, Alison Glen

Kaitohutohu/Māori development advisor,

Marama Tākao

2012

Chair / NZLS nominee, Radha Balakrishnan (until Nov)

Chair / RC Hamilton / RD 9930, Patrick Cummings (from Nov)

McKenzie family, David Vance

McKenzie family / personal trustee, Christopher McKenzie

RC Auckland North / RD 9910, Charles Wilson

RC Auckland / RD 9920, Eric Keys

RC Wellington / RD 9940, Tricia Walbridge / Joan Smith

RC Christchurch / RD 9970, Lyn Holmes

RC Dunedin / RD 9980, Neville Caird

NZLS nominee, Manaia King

NZMA nominee, Julia Carr

Co-opted, Pania Ellison / Liz Tanielu

Co-opted, Warren Lindberg / Puāwai Wereta

Co-opted, Che Wilson

Personal trustee, Robyn Gibson

Executive director, Iain Hines

Administration officer, Alison Glen

Kaitohutohu/Māori development advisor,

Marama Tākao

Grants & programme advisor, Sam Caldwell

2013

Chair / RC Hamilton / RD 9930, Patrick Cummings

McKenzie family, David Vance

McKenzie family / personal trustee,

Christopher McKenzie

RC Auckland North / RD 9910, Charles Wilson

RC Auckland / RD 9920, Eric Keys

RC Wellington / RD 9940, Joan Smith

RC Christchurch / RD 9970, Lyn Holmes

RC Dunedin / RD 9980, Neville Caird /

Jonathan Usher

NZLS nominee, Manaia King

NZMA nominee, Julia Carr

J R McKenzie Trust board and staff in 2011. **Seated**: Iain Hines (executive director), Radha Balakrishnan (chair), Alison Glen and Charles Wilson. **Standing**, first row: David Vance, Pania Ellison, Julia Carr, Lyn Holmes, Warren Lindberg, Eric Keys and Marama Tākao. **Standing**, back row: Christopher McKenzie, Che Wilson, Tricia Walbridge, Neville Caird, Patrick Cummings and Melita Farley (contractor).

J R McKenzie Trust



Co-opted, Che Wilson
 Co-opted, Liz Tanielu
 Co-opted, Puāwai Wereta
 Personal trustee, Sarah McLennan
Executive director, Iain Hines
Administration officer, Alison Glen
Kaitohutohu/Māori development advisor,
Marama Tākao
Grants & programme advisor, Sam Caldwell

2014

Chair / RC Hamilton / RD 9930, Patrick
 Cummings
 McKenzie family, David Vance
 McKenzie family / personal trustee,
 Christopher McKenzie
 RC Auckland North / RD 9910, Charles Wilson
 RC Auckland / RD 9920, Eric Keys
 RC Wellington / RD 9940, Joan Smith
 RC Christchurch / RD 9970, Lyn Holmes
 RC Dunedin / RD 9980, Jonathan Usher
 NZLS nominee, Manaia King
 NZMA nominee, Julia Carr / Paula Thérèse King
 Co-opted, Che Wilson
 Co-opted, Liz Tanielu
 Co-opted, Puāwai Wereta
 Personal trustee, Sarah McLennan
Executive director, Iain Hines
Administration officer, Alison Glen
Kaitohutohu/Māori development advisor,
Marama Tākao
Grants & programme advisor, Sam Caldwell

2015

Chair / RC Hamilton / RD 9930,
 Patrick Cummings
 McKenzie family, David Vance
 McKenzie family / personal trustee,
 Christopher McKenzie
 RC Auckland North / RD 9910, Charles Wilson
 RC Auckland / RD 9920, Eric Keys
 RC Wellington / RD 9940, Joan Smith
 RC Christchurch / RD 9970, Lyn Holmes
 RC Dunedin / RD 9980, Jonathan Usher
 NZLS nominee, Manaia King
 NZMA nominee, Paula Thérèse King
 Co-opted, Liz Tanielu
 Co-opted, Puāwai Wereta
 Co-opted, Charisma Rangipunga
 Personal trustee, Sarah McLennan
Executive director, Iain Hines
Administration officer, Alison Glen
Kaitohutohu/Māori development advisor,
Marama Tākao
*Grants advisor & programme manager, Eileen
 Kelly*

2016

Chair / RC Hamilton / RD 9930, Patrick
 Cummings
 McKenzie family / personal trustee,
 Christopher McKenzie
 McKenzie family, David Vance / Anna Gibson
 RC Auckland North / RD 9910, Charles Wilson
 RC Auckland / RD 9920, Christine Scott
 RC Wellington / RD 9940, Joan Smith
 RC Christchurch / RD 9970, Lyn Holmes / Jane
 Montgomery
 RC Dunedin / RD 9980, Jonathan Usher
 NZLS nominee, Manaia King
 NZMA nominee, Paula Thérèse King
 Co-opted, Liz Tanielu
 Co-opted, Charisma Rangipunga
 Co-opted, Chelsea Grootveld
 Personal trustee, Sarah McLennan
Executive director, Iain Hines
Administration officer, Alison Glen
Kaitohutohu/Māori development advisor,
Marama Tākao
Grants advisor & programme manager,
Eileen Kelly

2017

Chair / RC Hamilton / RD 9930, Patrick
 Cummings
 McKenzie family / personal trustee,
 Christopher McKenzie
 McKenzie family, Anna Gibson
 RC Auckland North / RD 9910, Charles Wilson
 RC Auckland / RD 9920, Christine Scott
 RC Wellington / RD 9940, Joan Smith
 RC Christchurch / RD 9970, Jane Montgomery
 RC Dunedin / RD 9980, Jonathan Usher
 NZMA nominee, Paula Thérèse King
 Co-opted, Liz Tanielu
 Co-opted, Charisma Rangipunga
 Co-opted, Chelsea Grootveld
 Personal trustee, Sarah McLennan
Executive director, Robyn Scott
Director Peter McKenzie Project, Iain Hines
Kaitohutohu/Māori development advisor,
Marama Tākao
Grants advisor & programme manager,
Eileen Kelly
Office administrator, Helen Anderson

2018

Chair / RC Hamilton / RD 9930, Patrick
 Cummings (until Dec)
 Chair / NZLS nominee, Manaia King (from Dec)
 McKenzie family / personal trustee,
 Christopher McKenzie
 McKenzie family, Anna Gibson
 RC Auckland North / RD 9910, Charles Wilson
 / Jerry Norman

RC Auckland / RD 9920, Christine Scott
 RC Hamilton / RD 9930, Melissa Campbell
 RC Wellington / RD 9940, Joan Smith
 RC Christchurch / RD 9970, Jane Montgomery
 RC Dunedin / RD 9980, Jonathan Usher
 NZMA nominee, Paula Thérèse King
 Co-opted, Chelsea Grootveld
 Co-opted, Aiolupotea Lili Tuioti
 Co-opted, Jay Farris
 Personal trustee, Sarah McLennan
 Executive director, Robyn Scott
 Director Peter McKenzie Project, Iain Hines
 Kaitohutohu/Māori development advisor,
 Marama Tākao
 Grants advisor & programme manager,
 Eileen Kelly
 Operations manager, Beverley Richards
 Systems manager, Helen Anderson

2019

Chair / NZLS nominee, Manaia King
 McKenzie family / personal trustee,
 Christopher McKenzie
 McKenzie family, Anna Gibson
 RC Auckland North / RD 9910, Jerry Norman
 RC Auckland / RD 9920, Christine Scott
 RC Hamilton / RD 9930, Melissa Campbell
 RC Wellington / RD 9940, Joan Smith
 RC Christchurch / RD 9970, Jane Montgomery
 RC Dunedin / RD 9980, Jonathan Usher
 NZMA nominee, Paula Thérèse King
 Co-opted, Chelsea Grootveld
 Co-opted, Aiolupotea Lili Tuioti
 Co-opted, Jay Farris
 Personal trustee, Sarah McLennan
 Executive director, Robyn Scott
 Director Peter McKenzie Project, Iain Hines
 Pou Ārahi, Marama Tākao
 Grants advisor & programme manager,
 Eileen Kelly
 Operations manager, Beverley Richards

J R McKenzie Trust board and staff in 2018. **Seated:** Manaia King (chair), Robyn Scott (executive director) and Joan Smith (deputy chair). **Standing,** first row: Helen Anderson, Paula Thérèse King, Jane Montgomery, Christine Scott, Jerry Norman, Eileen Kelly, Marama Tākao and Aiolupotea Lili Tuioti. **Standing,** back row: Jonathan Usher, Jay Farris, Melissa Campbell, Anna Gibson and Dr Chelsea Grootveld. Absent: Christopher McKenzie.

J R McKenzie Trust



2020

Chair / NZLS nominee, Manaia King
McKenzie family / personal trustee,
 Christopher McKenzie /
 Sibyl Bloomfield
McKenzie family, Anna Gibson
RC Auckland North / RD 9910, Jerry Norman
RC Auckland / RD 9920, Christine Scott
RC Hamilton / RD 9930, Melissa Campbell
RC Wellington / RD 9940, Joan Smith
RC Christchurch / RD 9970, Louise Edwards
RC Dunedin / RD 9980, Jonathan Usher
NZMA nominee, Paula Thérèse King
Co-opted, Chelsea Grootveld
Co-opted, Aiolupotea Lili Tuioti
Co-opted, Jay Farris
Personal trustee, Sarah McLennan
Executive director, Robyn Scott
Director Peter McKenzie Project, Iain Hines
Pou Ārahi, Marama Tākao
Grants advisor & programme manager,
 Eileen Kelly
Operations manager, Beverley Richards

2021

Chair / NZLS nominee, Manaia King
McKenzie family, Anna Gibson
McKenzie family, Sibyl Bloomfield
RC Auckland North / RD 9910, Jerry Norman
RC Auckland / RD 9920, Ann Tod
RC Hamilton / RD 9930, Melissa Campbell
RC Wellington / RD 9940, Joan Smith
RC Christchurch / RD 9970, Louise Edwards
RC Dunedin / RD 9980, Jonathan Usher
NZMA nominee, Paula Thérèse King
Co-opted, Chelsea Grootveld
Co-opted, Aiolupotea Lili Tuioti
Co-opted, Jay Farris
Personal trustee, Christopher McKenzie
Personal trustee, Sarah McLennan
Executive director, Robyn Scott
Director Peter McKenzie Project, Iain Hines
Pou Ārahi, Marama Tākao
Grants advisor & programme manager,
 Eileen Kelly
Pacific strategy and engagement lead,
 Sylvia Moe
Operations manager, Beverley Richards



J R McKenzie Trust board in 2020. **First step:** Jerry Norman
Second step: Christine Scott, Louise Edwards and Joan Smith (deputy chair) **Third step:** Anna Gibson, Christopher McKenzie and Manaia King (chair) **Fourth step:** Aiolupotea Lili Tuioti, Melissa Campbell and Chelsea Grootveld **Top step:** Jay Farris and Jonathan Usher.

J R McKenzie Trust



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Photo credits

Prologue

- p. 13 Portrait of JR McKenzie, 1929, Crown Studios Ltd 1/1-032986-F. Alexander Turnbull Library, Wellington.
- p. 18 Roy and Don McKenzie, 1940s. R A McKenzie Collection, 1922-2007 photographs, Reference Number PA1-0-1585. Alexander Turnbull Library, Wellington.
- p. 18 JR McKenzie with colt Highland Scott. R A McKenzie Collection, 1922-2007 photographs, Reference Number PA1-0-1584-56-4. Alexander Turnbull Library, Wellington.
- p. 22 Portrait of Sir John Robert Hugh McKenzie, 1954, by Edward Irvine Halliday, oil on canvas. JR McKenzie Trust, PAColl-9908-4-16. Alexander Turnbull Library, Wellington.
- p. 31 The McKenzie store at the Glenfield Shopping Mall, Auckland, in 1976. Auckland Libraries Heritage Collections G0548.
- p. 44 The Royal New Zealand Air Force band playing at Liberty Corner 1/2-123876-G. *Evening Post* Collection. Alexander Turnbull Library, Wellington.
- p. 49 Roy McKenzie and Shirly wedding, PAColl-9908-1-48. Alexander Turnbull Library, Wellington.
- p. 50 Disabled Servicemen's Bowling Club in Lloyd Street, Wellington, c. 1948. National Publicity Studio AAQT 6539 A1336 Archives New Zealand.
- p. 53 Heritage children on an outing to Lake Ellesmere, c. 1950. Oswald Mazengarb, *The Story of Heritage* (Reed, Wellington, 1962).
- p. 55 J R McKenzie Trust board meeting in Wellington on 16 October 1958. *Evening Post* Collection EP/1958/3534-F. Alexander Turnbull Library, Wellington.
- p. 56 John Moody Albert Ilott, S P Andrew Ltd, 1/1-018367-F. Alexander Turnbull Library, Wellington.

Chapter one


- p. 33 JR McKenzie (right) hands over the first cheque of £5,000 to the JR McKenzie Trust chairman, Rotary Club of Wellington Papers, PAColl-9175-1. Alexander Turnbull Library, Wellington.
- p. 35 New Zealand Centennial Exhibition poster. Leonard Cornwall Mitchell (1901-71) Eph-E-EXHIBITION-1939-02. Alexander Turnbull Library, Wellington.
- p. 37 Rotary 1940 Conference Proceedings cover, Rotary Club of Wellington Papers, MS 93-349-1, Alexander Turnbull Library, Wellington.
- p. 58 Birthright New Zealand. Reference Number: EP/1959/1586-F. *Evening Post* Collection, Alexander Turnbull Library, Wellington.
- p. 60 Plunket book, 1936 Ref Eph-A-CHILD-1936-01-front. Alexander Turnbull Library, Wellington.
- p. 61 The Royal New Zealand Plunket Society, Karitane Home, baby, Melrose, Wellington, 7 May 1957, EP/1957/2159a-F. Negatives of the *Evening Post* newspaper, Alexander Turnbull Library, Wellington.

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- p. 65 A still from the 1969 McKenzies Ltd television commercial by Kenyon, Brand and Riggs Ltd showing the McKenzies shopping reporter in store. K E Niven and Co., commercial negatives, 1/2-221597-F. Alexander Turnbull Library, Wellington.
- p. 65 McKenzies shopping reporter with 'pick n mix' lollies 1971. K E Niven and Co., commercial negatives, 1/2-225877-F. Alexander Turnbull Library, Wellington.
- p. 65 A promotion outside a McKenzies store during the 1960s, 1/2-221597-F. Alexander Turnbull Library, Wellington.
- p. 66 The Beatles on the balcony of the Hotel St George, Wellington, c. 20 June 1964. Morris James Hill (1929–2002), 1/4-071852-F. Alexander Turnbull Library, Wellington.
- p. 66 Hutt Park Raceway night trotting meet at Lower Hutt on 25 February 1960. *Evening Post* and *Dominion* Collection, EP/1960/0691-F. Alexander Turnbull Library, Wellington.
- p. 72 Roydon Lodge, circa 1940s. PA1-0-1584-50-6. Alexander Turnbull Library, Wellington.
- p. 75 The Cobham Outward Bound School, Anakiwa. Auckland Libraries Heritage Collections 1370-474-24.
- p. 75 An Outward Bound course in the 1960s. Auckland Libraries Heritage Collections 1370-474-25.
- p. 76 Roy and Dr. Fergus Taylor laying Plaque. PAColl-9908-2-23. Alexander Turnbull Library, Wellington.
- p. 77 Roy at Rotary, PAColl-9175 Rotary Club of Wellington Photographs, 19 July 1971. Alexander Turnbull Library, Wellington.
- p. 78 National Children's Health Research Foundation 'A Cry for Help' campaign leaflet, 1980s, New Zealand, by Royal New Zealand Plunket Society Inc. Gift of the Royal New Zealand Plunket Society Inc, 2010. Museum of New Zealand Te Papa Tongarewa (GH012876/1).
- p. 80 Girls playing netball in the Ōtara Town Centre carpark, 1973. Basil Williams Collection, Auckland Libraries Heritage Collections 1727-088.
- p. 82 James Cook Hotel c. 1970s, Bernard Diederich, AA00012617 Digital Public Library of America.
- p. 83 Official Emblem for the International Year of the Child 1979, UN Photo 387410.

Chapter three

- p. 86 James Cook Hotel c. 1970s, Bernard Diederich, AA00012617 Digital Public Library of America.
- p. 95 J R McKenzie with sons, Don and Roy. PA1-0-1581-29-2. Alexander Turnbull Library, Wellington.
- p. 96 Don and Roy McKenzie in cross country ski competition, 1937. PA1-0-1584-18-1. Alexander Turnbull Library, Wellington.
- p. 96 Roy at [airforce] graduation. PAColl-9908-4-14. Alexander Turnbull Library, Wellington.




p. 110 Sir Roy McKenzie, caricature, 27 July 2005. Webb, Murray, 1947- : Digital caricatures. DX-101-141. Alexander Turnbull Library, Wellington.

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- p. 125 Prime Minister David Lange 'Opening the Books' presentation on 30 August 1984. *Evening Post* Collection, EP/1984/4089/24A-F. Alexander Turnbull Library, Wellington.
- p. 135 Collective members and supporters of Te Whare Pounamu, Dunedin's women's refuge in 1990, Allied Press, *Otago Daily Times*.
- p. 135 National Collective of Independent Women's Refuges historic logo.
- p. 138 Capital Discovery Place photos, Joe Bleakley.

- p. 143 McKenzie family celebration. PAColl-9908-2-58. Alexander Turnbull Library, Wellington.
- p. 146 Minister of Finance Ruth Richardson. *Evening Post* Collection, EP/1990/4372/21-F. Alexander Turnbull Library, Wellington.
- p. 148 Board 19[9]7. PAColl-9908-2-51. Alexander Turnbull Library, Wellington.
- p. 149 Lesley Carmichael and Iain Hines. PAColl-9908-2-49. Alexander Turnbull Library, Wellington.

Chapter five

- p. 159 100% Pure New Zealand advertising poster, c. 2000. Eph-E-TOURISM-2004-07. Alexander Turnbull Library, Wellington.
- p. 168 Editorial from the *Dominion Post* on 4 September 2007, Stuff Ltd.
- 



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- Te Ara — the Encyclopedia of New Zealand, Ministry for Culture and Heritage <https://teara.govt.nz/en>



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- 6 Death certificate for John Robert McKenzie, dated 9 Nov 1955, J R McKenzie Trust.

A portrait of the man

- 7 McKenzie, *Footprints*, p. 9.

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