

# Otanewainuku Kiwi Trust

Strategic Action Plan  
2015 – 2022



# Executive Summary

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## Introduction

The Otanewainuku Kiwi Trust (the Trust) first formed in 2002 to preserve our taonga (treasure) of native species for generations to come and reverse the decline of a population of North Island Brown Kiwi in the Otanewainuku Forest. Thirteen years on, with a population of over 20 kiwi and 26 kokako, the Trust has grown well beyond the hopes of the nine original Trustees.

The Trust has prepared this Strategic Action Plan (the Plan) in response to the clear need to embrace the entire ecology of this unique, virgin forest. It covers a seven-year period to guide the Trust towards its 20th year in 2022. This Plan's current status is as an Operative Draft.

## Vision

To protect and restore the indigenous ecosystem  
and biodiversity of Otanewainuku.

## Values

Stewardship | Manaakitanga | Accountability | Excellence | Teamwork

## Strategic Objectives

Our strategic objectives recognise all of the day to day maintenance functions of the Trust, which serve to achieve the primary purpose of ecosystem restoration.

The seven strategic objectives are:

1. Protect the Otanewainuku ecosystem and restore indigenous biodiversity.
2. Expand the area managed by the Otanewainuku Kiwi Trust.
3. Engage with stakeholders.
4. Recruit, train and support volunteers.
5. Promote professional governance and management of the Otanewainuku Kiwi Trust.
6. Collaborate with other conservation projects.
7. Secure long-term, sustainable funding.



## Maintenance Projects and Development Initiatives

The Plan sets out key project actions for the Trust, including funding requirements, and links these actions to the strategic objectives. There are important opportunities within these projects including:

- Forest protection from predators.
- Kiwi breeding programme maintenance.
- Kiwi monitoring.
- Kokako census.
- Volunteer training and induction.
- Administration capability.
- Adult kiwi translocation.
- Kokako translocation.
- Expand the area under management.
- Trial new technology
- Purchase 219 ha Tauranga City Council (TCC) land next door.
- Kiwi proof fence - Entire protected area.
- Paid Staff.
- Introduce other species.
- New shelter and picnic tables at Otanewainuku.
- Improve car parking.
- Develop Walkways and Viewing Platforms
- Education centre.
- See pages 6-12 for more detail.

## Capacity to Progress the Work

The Plan provides a new structure of five management groups with a broader representation at the Trustee level from the operational committees. It also details the way that the volunteer base will be managed to ensure the work of the Trust can continue.

The Trust has a long track record of sound financial management. For several years the Trust has held financial reserves sufficient to cover a year of pest and predator control as a contingency measure in the event that funding was temporarily lost. Traditional funding mechanisms remain important for our maintenance operations. However, new sources of funding will be required to execute the ambitious capital works strategy outlined in this Plan.



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## Document Status

On 1 December 2015 Trustees approved this document as an operative draft plan.

It is presented for review by Department of Conservation (DoC), Iwi, our volunteers, funders, Western Bay District Council (WBDC), Bay of Plenty Regional Council (BOPRC), Tauranga City Council (TCC), and the community.

Feedback welcomed by 31 March 2016

# Introduction

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The Otanewainuku Kiwi Trust (the Trust) started out in 2002 with the simple purpose to reverse the decline of a population of North Island Brown Kiwi in the Otanewainuku Forest.

Thirteen years on the Trust's influence and work has broadened. It is administered and supported by over 100 dedicated and passionate volunteers and many sponsors.

With a population of over 20 North Island Brown Kiwi, and 26 Kokako, the Trust has grown well beyond the hopes of the nine original Trustees (right).

The Trust has prepared this Strategic Action Plan (the Plan) in response to the clear need to embrace the entire ecology of this unique, virgin forest. It covers a seven-year period to guide the Trust towards its 20th year in 2022.



This Plan also refines the structure of the Trust and promotes clear communication while ensuring the Trust keeps volunteers at the core of everything that happens. Manaakitanga and teamwork are woven into the Plan as these are important values that have been central to our award-winning successes and continue to guide us as we move forward.

Many exciting opportunities have been explored by the Trust, including:

- Construction of a modern education shelter at the bush entrance
- Erecting a fence to retain wandering juvenile Kiwi
- Engagement of part time staff
- Profile raising projects aimed at attracting volunteers and funding

To harness these and other opportunities we will work hard to attract new partners and strengthen existing relationships, with a focus on mutually beneficial funding and sponsorship.

We accept the inherent demands of continuing to grow in our professionalism and consistently meeting our legal obligations. Going forward it is important that we keep striving for the innovation and excellence that has been fundamental to our inspiring achievements.

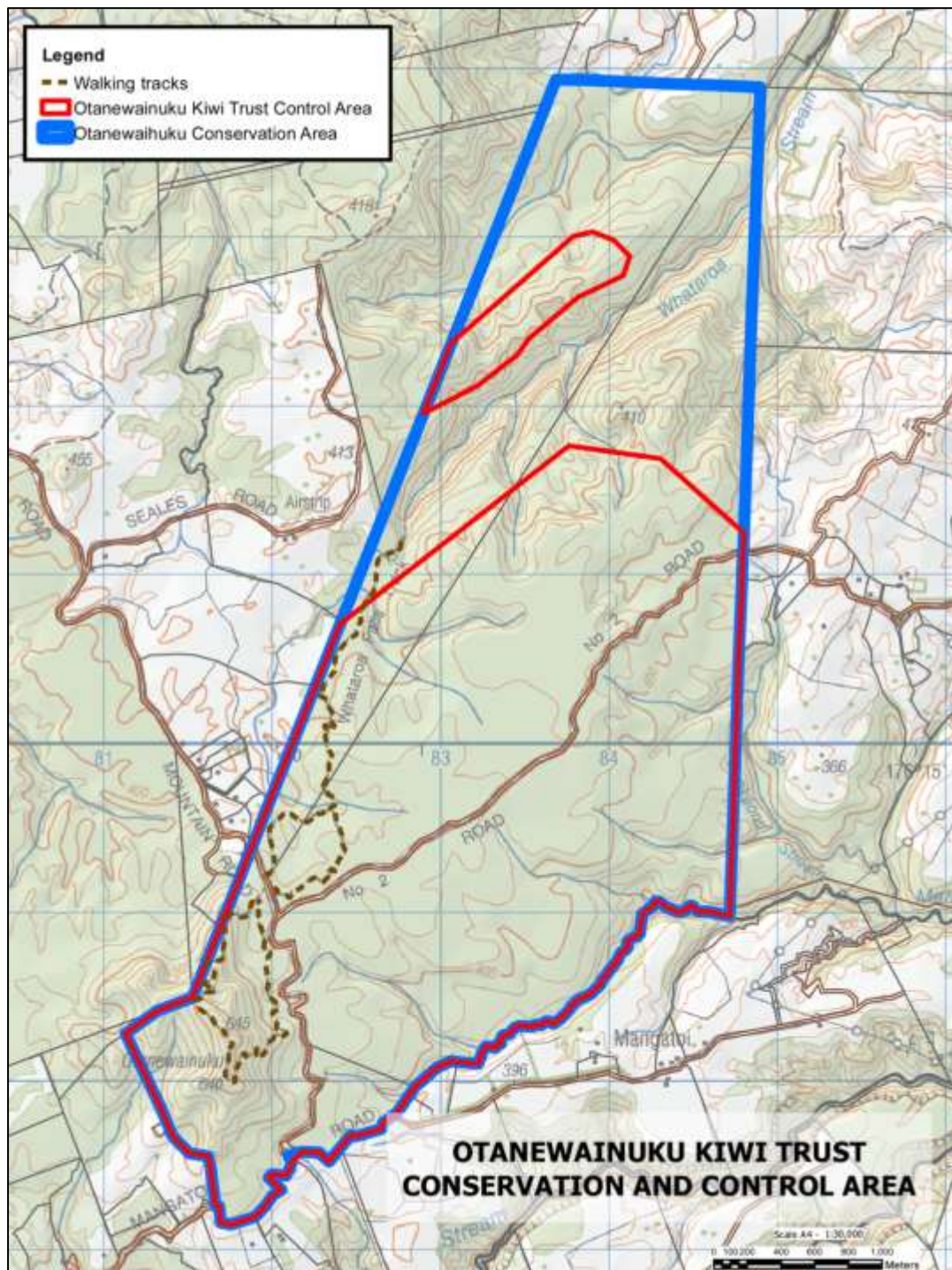
The achievements of the Trust to date reflect a huge contribution from volunteers, supporters, funders and our wider Western Bay of Plenty community.



# Otanewainuku Conservation Area

The Trust carries out operations within the Otanewainuku Conservation Area (OCA) through a Memorandum of Understanding with the Department of Conservation (DoC).

The OCA lies 25 km south of Tauranga and 20 km south-west of Te Puke. The forest within the Otanewainuku Conservation Area comprises 1500 hectares of pristine, unlogged, lowland podocarp forest. This is one of the finest examples of this type of forest in the Bay of Plenty. Originally set aside as a timber reserve in 1878; it remains today because the local community have fought to make sure it remained protected. The Trust currently has over 135 km of trap and bait station lines, 247 stoat tunnels and 1800 bait stations within the OCA.



## Our Vision

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Our revised vision reflects a shift in thinking from the early days of the Trust, which was focused on a single species, kiwi, to our present-day approach of working towards the holistic protection and restoration of the ecosystem.

**To protect and restore the indigenous ecosystem  
and biodiversity of Otanewainuku.**

## Our Values

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Our values provide the foundation for further growth and success. We aim to keep our values to the fore in our relationships with all stakeholders, to nurture a culture of cooperation and tolerance, and to bring together and align all of our volunteers and the many plans, decisions, and endeavours that are part of Otanewainuku Kiwi Trust. They are:

### Stewardship

We embrace Otanewainuku as a true Taonga. We acknowledge our time as kaitiaki (stewards) is possible because we stand on the shoulders of preceding generations who protected the forest in their time. We value being able to pass on a restored forest that will flourish for future generations.

### Manaakitanga (the concept of caring)

We value hospitality, mutual respect and generosity of spirit to ensure we care for our volunteers, community and stakeholders. We value all contributions equally. A foundation principle is that ecological and commercial priorities must go hand in hand with the wellbeing and mana of the people. We are committed to ethics and practices that ensure a safe and effective environment for our volunteers to work in.

### Accountability

We hold ourselves accountable in all we do. All Trust business, management and activities are conducted in accordance with our constitution.

### Excellence

We strive to make effective decisions based on sound information. We encourage volunteers to continuously improve their knowledge and skills. We value innovation and accept its inherent risks. We hold the view that making good use of advances in technology, methods and techniques is fundamental to achieving our vision.

### Teamwork

We acknowledge that we each have our own motivation, knowledge, skills, capacities and preferred way of communicating. We value this diversity and believe it strengthens teamwork.



# Strategic Objectives

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Our strategic objectives recognise all of the day to day activities, actions and tasks of the Trust, which serve to achieve the primary purpose of ecosystem protection and restoration.

Our seven Strategic Objectives will focus our decision making, build the path forward and identify where to concentrate our efforts.

## 1. Protect Otanewainuku's ecosystem - restore biodiversity

### Protect

The Trust aims to protect the ecosystem and habitat through ongoing intensive pest control, and management of all fauna and flora.

### Restore

The Trust aims to restore the Otanewainuku ecosystem and its indigenous biodiversity. To date our restoration efforts have focused on kiwi and kokako, which will continue, but other species will be considered. Our approach to restoration extends to build and restore the wider community connection with Otanewainuku.

**When the forest flourishes, the people flourish.**

## 2. Expand the area managed by the Otanewainuku Kiwi Trust

The Otanewainuku Conservation Area is a significant forest and a crucial part of a strategic corridor of forest linking the Kaimai ranges and Rotorua lakes to the coast at Papamoa. The Trust aims to strategically expand the managed area into the adjoining forests.

## 3. Engage with stakeholders

The Trust aims to gain the support of all local communities, iwi, neighbouring landowners, local government, businesses and residents, to provide the people, resources and funding required to realise our vision.

We acknowledge that:

- The wider community appreciates the need for conservation and desires to engage in the protection and restoration of Otanewainuku.
- There is a need for a visitor experience at Otanewainuku that enables people to engage with the ecology and enjoy the outstanding beauty of Otanewainuku.
- Iwi engagement is fundamental to the credibility and sustainability of the Trust.



## 4. Recruit, train and support volunteers

The Trust aims to have:

- Sufficient volunteers to carry out our activities, ensuring that all vacancies are filled, and there is no overloading of work on individuals, resulting in stress.
- Contented volunteers who are satisfied that their contribution is effective, valued and fulfils their personal goals.
- Capable people who ensure the work we do is of an excellent standard and the volunteer work environment is safe.

## 5. Promote professional governance and management of the Trust

The Trust aims to implement this throughout its operations by:

- Regularly and objectively reviewing all of our plans and operations.
- Effective Risk Management strategies and complying with Health & Safety legislation.
- Being accountable in our decision making.
- Complying with Trust Law and Internal Affairs Department reporting standards for charitable Trusts.

## 6. Collaborate with other conservation projects

The conservation effort throughout New Zealand is now dependent on community conservation groups. It is essential that these groups collaborate. The Trust aims to:

- Share skills, knowledge and resources.
- Contribute to national conservation plans.
- Contribute to the national advocacy effort that lobbies for a consistent conservation focus by policy makers and funders.

## 7. Secure long-term, sustainable funding

The Trust aims to establish diversified, long-term funding structures.



# Projects - overview

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This section of the Plan consolidates the actions involved in the delivery of ongoing, day to day maintenance and future development initiatives. Each project and initiative is linked to one or more strategic objective:

1. Protect the Otanewainuku's ecosystem and restore indigenous biodiversity.
2. Expand the area managed.
3. Engage with stakeholders.
4. Recruit, train and support volunteers.
5. Promote professional governance and management of the Trust.
6. Collaborate with other conservation projects.
7. Secure long-term sustainable funding.

An estimate is given of the capital funding required, expected annual operating costs and time frame. The actions and projects are not presented in any priority order as many are being, or could be, actioned concurrently. New initiatives depend on resources and funding coming together to make the project achievable.

There are important opportunities within each of these projects that the Trust will endeavour to harness:

- Opportunities to profile the Trust,
- Engage with the wider community,
- Promote the value of conservation to our community,
- Recruit new volunteers,
- Source new sponsorship and funding.

## Maintenance Projects

These are activities we must be doing all the time. They are ongoing and, therefore, have a high priority for continuous volunteer input and funding. A high level of forward planning is possible resulting in sufficient volunteers and funding being in place well ahead of time.

## Development Initiatives

These are projects that build on our existing platform. Some are of a one off nature. Others are longer term activities that we are not currently engaged in, but could be or need to be, to achieve our strategic objectives and thereby enable our vision.

# Maintenance Projects

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## 1. Forest Protection

Rat and possum control. Stoat trapping. Controlling feral cats, dogs and pigs. Protection of specific habitats and ecosystems.

**Annual Cost:** \$85k pa and increasing as management area expands. Using new technology may increase the capital outlay but reduce the annual operational costs.

**Strategic objectives:** 1, 3, 4 and 6.



## 2. Kiwi Programme Maintenance

Egg collection, hatching, growing out juveniles and releasing them into Otanewainuku.

**Annual Cost:** \$20-\$50k pa and increasing with increased egg numbers. Cost is approximately \$5k per egg, would eventually decrease when eggs are left in the forest to hatch naturally.

**Strategic objectives:** 1, 3, 4 and 6.



## 3. Kiwi Monitoring

Currently every kiwi released has a monitor. Birds and monitors are regularly checked by volunteers. Technology costs are high.

**Annual Cost** \$15-\$30k pa, increasing each year as bird numbers increase. Switching to male only monitoring would reduce costs. Currently funded by Western Bay District Council until 2017.

**Strategic objectives:** 1, 3, 4 and 6.



## 4. Kokako Census

We need to regularly count our kokako to monitor population progress and contribute data to the national Kokako recovery plan.

**Annual Cost:** \$7-\$15k every second year.

**Strategic objectives:** 1, 3, 4 and 6.



## 5. Volunteer Training and Induction

Building volunteer's skills in areas such as monitoring, trapping, census, safety, first aid, education, interpersonal skills, succession planning and administration.

**Annual Cost:** \$5-\$10k pa, plus extra to cover Controlled Substance Licence (CSL) registration.

**Strategic objectives:** 1, 4 and 5.



## 6. Improved Administration Capability

Support professional development of volunteers with governance and/or management responsibilities. Database operation, document and data archiving and ensuring compliance in all aspects of Trust work

**Annual Cost:** \$2-\$5k pa

**Strategic objectives:** 3, 4, 5 and 7.



## 7. Seeking Funding

A committee that applies for and seeks sponsorship from local and national businesses, iwi, DoC, local bodies and any other sources of funding.

**Annual Cost** Volunteer time. Potentially contract a fund raising professional.

**Strategic objectives:** 3, 5 and 7.



## 8. Iwi Consultation

Otanewainuku's conservation area is of interest and historical connection for six local iwi. Iwi perspective and involvement is important to the Trust for the planning and implementation of the projects.

**Annual Cost:** Volunteer time.

**Strategic objectives:** 3, 5 and 6.



## 9. Promotion, Education and Communication

Press releases, website maintenance, photography, newsletter, emailers, Facebook, hosting school and community groups at the forest, hosting sponsors in the forest, speaking to community groups and schools at their locations, Annual Public meeting, linking with community conservation events (e.g. sustainable backyards) and more. Potentially contract a teacher to lead the education programme.

**Annual Cost:** Volunteer time.

**Strategic objectives:** 3, 4 and 7.

## Interested in supporting the Trust's work? You can!

Choose a project you would like to support: Volunteer, become a business sponsor, make a donation or a bequest in your will. It all helps us keep Otanewainuku flourishing.

# Development Initiatives

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## 1. Adult Kiwi translocation

Relocation of mature adults from other eastern Taxa kiwi breeding projects. We desperately need more mature kiwi that will quickly establish definite breeding territories within the protected area. May take up to 15 years to achieve a sustainable breeding population. We have DoC approval to relocate up to 40 kiwi.

**Capital Cost:** \$10 -\$15k per adult kiwi translocation.

**Strategic objectives:** 1, 3, 4 and 6.



## 2. Kokako translocation

2015-2019. Relocation of birds from other kokako breeding projects. Current plan is to carry out two translocations of 10 to 20 birds each time over a four year period.

**Capital Cost:** Up to \$30k per translocation.

**Strategic objectives:** 1, 3, 4 and 6.



## 3. Bait station intensification of the current 950 ha

Was completed by Spring 2015.

**Capital Cost:** Fully funded by Community Conservation Partnerships Fund (CCPF).

This cost \$86.60 per hectare.

**Strategic objectives:** 1, 3, and 4.



## 4. Expand the area under management

2015-2025. Strategically, taking into account natural dispersal of kokako and kiwi, expand the managed area to potentially cover: all the Otanewainuku Conservation area, several areas of private land on the Otanewainuku boundary and adjacent Tauranga City Council land.

**Capital Cost:** Capital and maintenance costs of \$100 –\$150 per hectare. Partly funded by CCPF. New technology could cost up to \$700 per hectare.

**Strategic objectives:** 1, 2, 3 and 4.



## 5. New shelter and picnic tables at Otanewainuku.

The current shelter is beyond its use-by date. A modern shelter area with multiple picnic tables would add huge value to the visitor experience.

This is a two year project.

**Capital Cost:** \$150k.

**Strategic objectives:** 3, 4 and 7.



## 6. Improve Car Parking

Double the car park size and tar seal (or equivalent) the entire car parking area. One year project.

**Capital Cost:** \$30k with minimal annual operating expenses to maintain the safety barrier.

**Strategic objectives:** 3, 4 and 7.



## 7. Trial new technology

### 7.1 New trapping technology

Review (trial if necessary) all advances in pest and predator control technology.

**Capital Cost:** E.g. Good Nature kill traps: Approx. \$700 per hectare. Ratios of 1 possum trap and 3-5 rat traps per hectare.

**Annual Cost:** Gas and lures up to \$75 per hectare per year.

**Strategic objectives:** 1, 2, 3, and 4.



### 7.2 Monitoring technology

Review and trial new technologies to enhance monitoring of birds, bait stations and traps.

**Capital Cost:** \$10-\$20k per drone and up to \$30k for the tracking technology.

**Strategic objectives:** 1, 4 and 6.



## 8. Purchase 219 ha TCC land next door

TCC is currently planning to sell this land on Seales Rd. It is land which has only had rimu logged from it and is of high ecological value. Otanewainuku kiwi and kokako naturally disperse into this area. It is part of the forest corridor linking Otanewainuku to the Ottawa sanctuary which contains the endangered native Hochstetter frog.

**Capital Cost:** Potentially \$500k.

**Strategic objectives:** 1, 2, 3 and 4.



## 9. Education Centre

It is possible to build an Education Centre on the old WBDC quarry site on the NW side of the mountain. This would be excellent for hosting school groups, guided tours, campervans and increasing parking.

**Capital Cost:** \$500 - \$750k. Operating costs and staff funded by visitor fees.

**Strategic objectives:** 3, 4 and 5.

## 10. Fencing



### 10.1 Kiwi Proof Fence - Entire Protected Area

Kiwi proof post and standard wire-netting fence to contain the kiwi in the entire area. Three to seven year project.

Capital Cost \$400k with considerable volunteer input.

Annual Cost 10% pa maintenance cost.

Strategic objectives: 1, 2, 3, and 4.



### 10.2 Kiwi Proof Fence - 20 Hectares

A kiwi proof post and standard wire-netting fence to contain juvenile and sub-adults in a small area prior to release. One year project. Not necessary if fence the entire area as per 10.1

Capital Cost: \$10-\$20k capital cost.

Annual Cost 10% annual maintenance cost.

Strategic objectives: 1, 2, 3, and 4.



### 10.3 Kiwi crèche – Predator proof fencing

Original crèche plan investigated by past Trust and not followed though. Only viable if part of an Eastern Taxa Kiwi management strategy.

Capital Cost: \$640k for 2005 plan plus 10% annual maintenance costs.

Strategic objectives: 1, 2, 3, and 4.



## 11. Paid Staff

### 11.1 Volunteer Coordinator

Part time 1 day a week.

Annual Cost: \$10k pa. Strategic objectives: 3 and 4.



### 11.2 General Manager

Part time 2 days a week.

Annual Cost: \$20k pa. Strategic objectives: 3, 5 and 7.

### 11.3 Teacher

Part time, on call. Costs covered by student fees.

Annual Cost: \$10k pa. Strategic objectives: 3.



### 11.4 Kiwi Monitoring

Two part time at six days a week.

Annual Cost: \$25k pa. Strategic objectives: 1, 3 and 4.



## 12. Develop Walkways and Viewing Platforms

All of these projects require investment in signage and planning with DoC.  
Strategic objectives: 3, 4 and 7.

### 12.1 Rimu Loop Track - Wheelchair Walkway

Transform the Rimu loop track to wheelchair accessible.  
Capital Cost: \$ 30k Annual Cost Maintenance of surface.



### 12.2 Whataroa Falls to No. 2 Rd Loop Track

Create a loop track to connect the Whataroa Falls to No.2 Rd on the Te Puke side of Otanewainuku.  
Capital Cost: \$ 20k materials – track formation work mostly by volunteers.



### 12.3 Mountain Track Upgrade

Add extra steps and boardwalks to the Mountain loop track.  
Capital Cost: \$10 to 20k. Timber cost; most work done by volunteers.

### 12.4 Around the Foot of Otanewainuku

Create a loop track that starts at the picnic area, runs past the old quarry on the North West side, around to the Western back boundary, out to Mangatoī Rd, running parallel to Mangatoī Rd, across Blowfly Creek, then parallel to No. 2 Rd and back to the picnic area.  
Capital Cost: \$30k materials – track formation work mostly by volunteers.



### 12.5 Whataroa Waterfalls Steps and Viewing Platforms

Create a visitor friendly structure to enable visitors to enjoy the four waterfalls further down-river from the Whataroa Falls.  
Capital Cost: At least \$100k for engineering, contractors and timber.



### 12.6 Bush Canopy Walkway

Create a visitor friendly structure to enable visitors to experience and enjoy a walk through the forest canopy.  
Capital Cost: At least \$250k for engineering, contractors and timber.

## 13. New Species Introduction

The Trust will continually review the possibility of introducing other native species.  
Capital Cost: Unknown Strategic objectives: 1.



## 14. Purchase 668 Mountain Rd Oropi

House and small property, highly suitable as administration headquarters to provide storage for gear and accommodation for a manager.  
Capital Cost: Recently sold for \$350k Strategic objectives: 4 and 5



# Capacity to Progress the work

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This section of the Plan looks at our capacity to progress work in three important areas - governance, management and action.

## 1. Governance

### Constitution

The Trust was formed in 2003 and is incorporated as a Trust Board. The Trust functions within a Charitable Trust Deed and is guided by the constitution and rules of the Otanewainuku Kiwi Trust. In response to the growth of the Trust and diversification of our activities, the Trust aims to review the constitution to ensure it is fit for purpose and future proof.

### Memorandum of Understanding with the DoC

Section 4 of the constitution and rules directs the Trust to “assist DoC in its mandate to foster natural and historic resources...”

To achieve this, the Trust operates in the Otanewainuku Conservation Area under a memorandum of understanding with DoC. This memorandum is now under review and a new management agreement is to be negotiated with DoC in line with this Plan and the constitution. The Trust will continue to strongly support DoC in its plans to secure the highest possible level of statutory protection for the Otanewainuku Conservation area.

The Trust also assists DoC in its responsibility to link Iwi with DoC administered Crown land. The Otanewainuku Conservation Area is one of several DoC administered areas of conservation land in our locality. Each Iwi can have up to several conservation estates within its area of interest and connection.

Six local Iwi have indicated that Otanewainuku is within their areas of interest and ancestral connection, with particular emphasis on the mountain, as follows:

- Ngati Pukenga (Welcome Bay)
- Waitaha (Te Puke)
- Tapuika (Te Puke)
- Ngati Rangiwewehi (Hamurana- Rotorua)
- Ngaiterangi (Tauranga)
- Ngati Ranginui (Tauranga)

The Trust includes the historical, cultural and spiritual perspectives of Iwi in its plans. The Trust recognises that these perspectives add value to the protection and restoration of Otanewainuku.

The Trust will continue to seek Iwi contribution to the planning and implementation of the activities and projects outlined in this Plan.



## Trustees

The Trust is governed by a Board of up to ten Trustees whose key roles are outlined in the Functions and Duties of the Trustees, recorded in the constitution and rules. To achieve the objectives of this Plan with excellence, all Trustees must receive clear and detailed job descriptions.

To be fully implemented, this Plan requires the Trust to have ten Trustees contributing to the monthly board meetings.

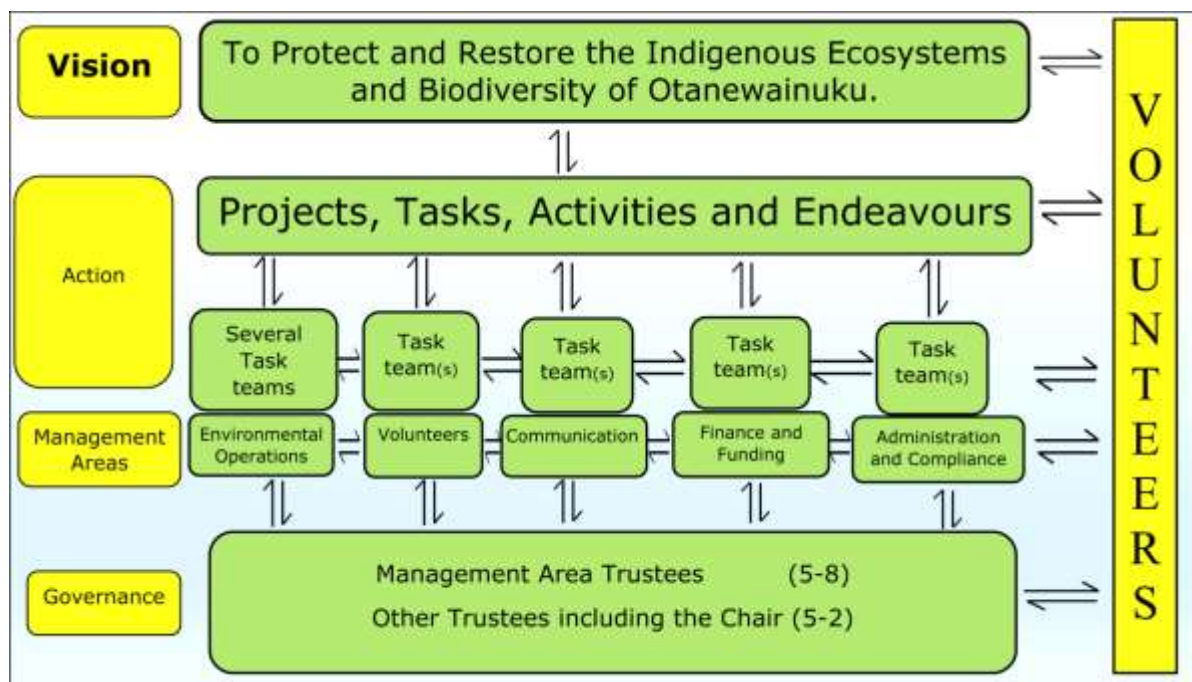
At least five and up to eight Trustees to represent management areas and report to the Board on the progress made and resources required by the committees and task teams.

Up to five Trustees, with suitable expertise and profile, that report to the board for additional tasks. For example, Chair, DoC communication, Iwi liaison, compliance, local/regional/central Government and one-off projects or events that are not part of the five management areas (detailed below).

## 2. Management

This Plan proposes that the management of the Trust is spread over five management areas:

- Environmental Operations (Ops Committee),
- Volunteer,
- Communications - Promotion, Education, Advocacy and Collaboration,
- Finance and Funding,
- Administration, Compliance and Database.



Excellent communication between the task teams and with the board of Trustees is a priority and essential to achieve target outcomes. A more formal, yet volunteer friendly reporting template is to be adopted to ensure important information is shared. A regular in house newsletter for volunteers will assist communication.

### 3. Action

Action on the ground is only possible if we have the resources: people and finance.

#### People - volunteers

It has been often quoted that the “volunteers are the lifeblood of our Trust.” Strategic objective No. 4 supports the Trust having sufficient, contented and capable volunteers. To achieve this objective will require several interrelated strategies.

##### *Community Engagement*

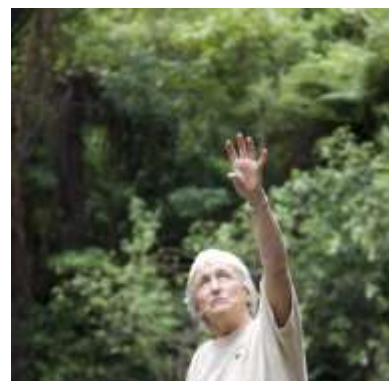
To be sustainable, the Trust must continually engage with the community to ensure consistent recruitment of volunteers. Going forward, the Trust will focus not so much on what we achieve but more on how we apply Manaakitanga from the volunteers’ point of view. Motivated, enthusiastic, capable volunteers who enjoy their experience at Otanewainuku and have a sense of being involved in a project bigger than them, will ensure a sustainable volunteer base for the Trust. Contented volunteers speaking well of Otanewainuku Kiwi Trust through word of mouth is the best and most cost effective advertising we can get. Strategically, our community engagement will focus on what we can offer the community.

##### *Volunteer Opportunity*

Strategically, the Trust will look on every role and task as a volunteer opportunity and a valuable learning experience. The Trust holds the view that every time current volunteers do an extra task themselves, they risk becoming overloaded, and they deny the community a volunteer opportunity. In the same way, where the Trust employs someone to do a task (that could have been done by a volunteer), we are denying the community a volunteer opportunity.

##### *Recruitment & Selection*

Recruitment and selection is important for new roles, for the succession of existing roles and to simply spread the workload. The Trust promotes recruitment that is ongoing, proactive, professional, relevant and inspires engagement from our community. The Trust values recruitment that is based on sound research and marketing, using the most appropriate medium of communication to engage with all people of the Western Bay of Plenty.



The Trust will continue with current strategies of:

- Word of mouth
- Website, Facebook and emails
- Public open days/night-walks at Otanewainuku
- Publicly advertised work days
- Linking Otanewainuku activities to community sponsored and supported events (sustainable Back Yards month, Conservation Week, Play in the Bay, Sport BOP, Echo walking festival and BOP Enviro Hub initiatives.)

The Trust is committed to supporting our communications team to connect with our community to ensure it is easy and fun for people to engage with the Otanewainuku conservation effort.

### *Succession*

For this to work well the Trust aims to continue to build a culture whereby volunteers are encouraged to change roles. This culture includes an expectation that all volunteers should have a successor being trained up to take their role. This increases volunteer capacity and helps maintain enthusiasm.

By this strategy the Trust can develop an increased pool of skilled and experienced people who can contribute to leadership and governance as part of succession for all roles. This strategy also protects volunteers from work overload.



Succession and recruitment strategies are clearly linked and are fundamental to the sustainable operation of the Trust.

### *Induction*

The Trust aims to provide all people who join our conservation effort, or change roles within the Trust, with high quality induction to the roles and tasks that they wish to undertake. This induction is supported by a Volunteer's Handbook. Induction is one of the key roles of a volunteer coordinator.

### *Training, Personal Development and Capacity*

All tasks, activities and roles within the Trust require some level of expertise, skill and knowledge. Some tasks, activities and roles require a high level of capability. To ensure tasks, activities and roles are carried out safely and with excellence the Trust:

- Is committed to providing regular training sessions to build volunteer capacity.
- Encourages (financially if necessary) volunteers to attend workshops, seminars and specialised training that contribute to building the people capacity of the Trust.
- Expects every Trustee to achieve at least one area of personal development, per year, to build their governance capacity.
- Shall provide written guidelines for all tasks and responsibilities carried out.

### Health and Safety

The Trust is committed to ensuring a safe and enjoyable experience for all volunteers. The Trust is fully committed to complying with all aspects of Health & Safety legislation. The Trust is required to annually review its Health & Safety Plan and safety procedures. To ensure compliance the Trust will recruit suitably qualified people, and/or arrange training to increase capacity in this area.

### The Finances to pay for it

Historically, tasks, projects and activities have been funded by small grants and donations from many organisations and individuals. This has involved a wide search for funding opportunities and continual applications for grants and funding. In general they are one-off type funding sources and as a result it is difficult to make long term plans.

The policy of the Trust is to have sufficient reserve funds to be able to finance the next year's operations, especially the pest control programme. In that way any funding approvals and/or declines will not compromise the current year's operational plan.

The Trust has recently received significant financial support from DoC through its Community Conservation Partnership Fund.

We receive environmental mitigation income from a local quarry.

The Trust will continue to seek long term sustainable financial solutions, including:

- Consistent financial support from DoC.
- Government grants - local, regional and national.
- Non-Government Organisation (NGO) grants.
- Corporate sponsorships.
- Philanthropic donations.
- Corporate environmental mitigation.
- Private cash donations including crowd funding.
- Sales of Otanewainuku branded merchandise.
- In kind donations of products and services.
- Negotiating concession opportunities with DoC.
- Promotion of the Acorn Foundation's Otanewainuku Kiwi Trust Endowment Fund.



The following statement of our financial position clearly shows that the Trust has maintained a sound financial position as a result of many years of excellent management of the funds and resources that we have been given. To remain financially sustainable the Trust is committed to maintaining this high level of fiscal management.

<b>Otanewainuku Kiwi Trust</b>			
<b>Statement of Financial Position as at 31st March</b>			
	2015		2014
<b>Accumulated Funds</b>			
Balance as at 1 April	129,133		100,232
Net Surplus (Deficit) for the year	18,493		28,901
Balance as at 31st March	147,626		129,133
<b>Current Assets</b>			
Bank of New Zealand			
General Funds	41,814		27,918
Kiwi Management Funds	12,879		10,245
Kokako Management Funds	388		642
Forest Health Fund	134,603		68,983
Total Current Assets	189,684		107,788
Accounts Receivable	13,291		13,562
Prepaid Expenses			
Total Current Assets	202,975		121,350
<b>Fixed Assets</b>			
at cost less depreciation	30,611		15,561
Total Assets	233,586		136,911
<b>Current Liabilities</b>			
Accounts Payable	15,660		2,777
Grants Received but not yet Used.	70,300		5,000
Total Liabilities	85,960		7,777
<b>Net Assets</b>	<b>147,626</b>		<b>129,133</b>



# Continual Review

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The process of developing and reviewing our decisions, plans, policies and operating procedures is ongoing.

The Trust will adopt a formal review procedure to promote sustainable progress towards our strategic objectives and to ensure:

- Accurate reflection.
- Transparency around our successes and mistakes.
- Progressive and robust discussion.
- Adoption of best practice.

For key decisions the Trust will formally document the decision process and apply the formal review procedure.

## Interested in supporting the Trust's work?

Choose a project you would like to support. Volunteer, become a business sponsor or make a donation. It all helps us keep Otanewainuku flourishing.

For donations either in your lifetime or after, you can give a gift that keeps on giving. Talk to your lawyer about the Acorn Foundation Endowment Fund.



## Acknowledgements

The Trust would like to thank the following volunteers: Our strategic plan review team: Nigel Veale, Hans Pendergrast, Gavin Cherrie and Glenn Ayo. Thanks to Kerry Ryan of Ryan and Associates for his professional leadership of the process. Also we'd like to express our gratitude to Katrina Brown for editing and Moana Bianchin for plan design and editing. Thanks to all our other volunteers who have given their time and ideas. Your input is greatly valued.

### Otanewainuku Kiwi Trust

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### Document Status

On 1 December 2015 Trustees approved this document as an operative draft plan.

It is presented for review by Department of Conservation (DoC), Iwi, our volunteers, funders, Western Bay District Council (WBDC), Bay of Plenty Regional Council (BOPRC), Tauranga City Council (TCC), and the community.

Feedback welcomed by 31 March 2016



When the Forest Flourishes, the People Flourish.