



Strategy

2026-2029

Live Local: Give Local



Our Mission

Connecting people to causes they care about.

Our Vision

To become the caretaker (Kaitiaki) of local giving and the leading connector of philanthropy in the Eastern Bay of Plenty.

Our Pillars

PEOPLE

- Make local giving easy and accessible.
- Ensure the wishes of the donor are always upheld with respect, transparency, and care.
- Build strong relationships with professional advisors to support giving decisions.

COMMUNITY

- Focus on community needs and local causes.
- Create sustainable, multi-generational impact through endowment-based funding.
- Deliver cost-efficient, bespoke support to initiatives that align with EBCF's mission.

CONNECTION

- Connect local people with local causes, creating a strong sense of community ownership and involvement.
- Foster deep engagement with iwi, service providers, charities, schools, and businesses.

Pillars of Strategic Focus



FINANCIAL STEWARDSHIP

Grow and manage funds responsibly with strong governance and investment strategies.



COMMUNITY ENGAGEMENT

Cultivate meaningful relationships with donors, iwi, service providers, and community organisations.



PHILANTHROPIC LEADERSHIP

Be the first point of contact and most trusted platform for giving in EBOP.



ORGANISATIONAL EXCELLENCE

Strengthen internal capabilities, systems, and leadership to support long-term success.

Live **Local**: Give **Local**



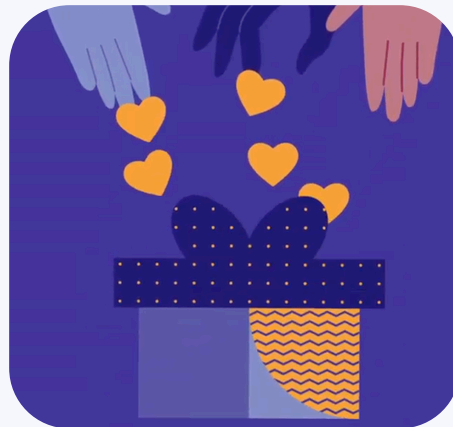
Story & Identity

Tell our story confidently and consistently, built around the core message:

People – Community – Connection.

Communicate EBCF's unique value:

- Trusted and proven
- Sustainable and cost-efficient
- Bespoke solutions for donors and charities



Strategic Goals for the Foundation

Ten Year Strategic Goals

- 20 educational opportunities or scholarships
- \$20 million in funds under management
- Sustainable funding of local services and charities through enduring endowment funds
- Assume the role of caretaker of philanthropy in the EBOP.



Building Operational Sustainability

Focus Areas:

- Operational Efficiency
- Finalise PA Handbook
- Strategy
 - Build foundation for operational sustainability
 - Establish consistent storytelling practices
 - Begin expanding corporate and professional connections.



Three-Year Growth Strategy 2026 - 2029

- Achieve operational sustainability
- Deliver consistent, confident storytelling
- Build corporate and professional partnerships
- Support local charities with enduring funding models
- Cement EBCF's role as caretaker and connector with giving in EBOP.

External Growth & Engagement

Focus Areas:

- Strengthen corporate connections
- Amplify media/PR and storytelling
- Launch and promote local charity endowment funds
- Begin broader community education around local giving.



Measurable Community Impact

Key Milestones:

- \$5 million under management
- 10 scholarships established
- Stronger networks with professional advisors
- Tangible support for local services and causes.