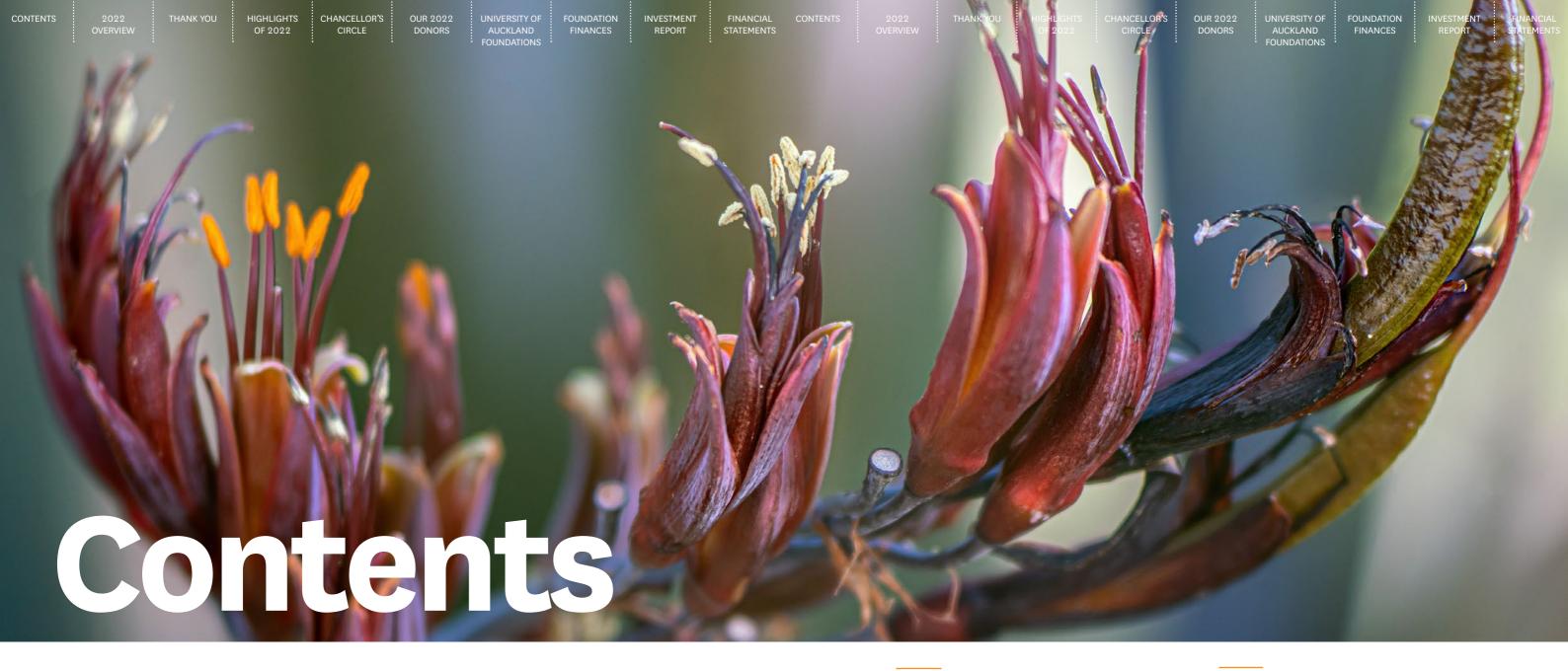
CELEBRATING OUR DONORS' GENEROSITY

The University of Auckland Annual Report to Donors





Overview of 2022

Thank you for your generous support

Highlights of 2022

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Thank you to all our generous donors

for contributing to another very successful year of philanthropy at the University of Auckland.

IN 2022, WE RECEIVED

\$56,116,674

THROUGH

GIFTS FROM

DONORS.

\$26,923,509

WAS RECEIVED TO SUPPORT MAJOR PROGRAMMES OF RESEARCH ACROSS MANY DISCIPLINES, **ESPECIALLY IN THE AREAS OF**



HEALTH AND 1EDICINE.



SUPPORT FOR ACADEMIC CHAIRS AND FELLOWSHIPS WAS EXCEPTIONALLY STRONG, **COMING TO A TOTAL OF**

> \$8.981.474 **UP FROM**

\$5,392,125

IN 2021.

The University recognises the exceptional generosity of the ollowing donors, who gave \$1 million or more in 2022:

Aotearoa Foundation

Auckland Medical Research Foundation

Estate of Professor Peter Bergquist

Cancer Society **Auckland Northland**

Cure Kids

The Dines **Family** Charitable Trust

The Douglas Charitable **Trust**

Estate of Carlo and Julie Fiorentino |

The Hearing Research Foundation of **New Zealand**

Heart **Foundation**

Hugh Green Foundation Neurological Foundation of New **Zealand**

Wright **Family** Foundation

In addition to their outstanding gifts in 2022, many of these generous donors are ongoing major supporters and are acknowledged through our cumulative giving society, The Chancellor's Circle. (See page 27.)

.....

The University of Auckland Foundations use CASE (Council for Advancement and Support of Education) global standards for calculating total funds raised in any year. These figures include all philanthropic income received through the University of Auckland Foundation, the Medical and Health Sciences Foundation and directly to the University of Auckland.

THE LARGEST NUMBER OF GIFTS **WAS TO SUPPORT**

student scholarships and projects - A TOTAL OF

THESE GIFTS CAME FROM 1,578 DONORS AND HAD A TOTAL VALUE OF

\$8,757,424

UP FROM \$3,956,068 IN 2021.

IN 2022,

973 students

WERE AWARDED

\$5,015,651

IN DONOR-FUNDED SCHOLARSHIPS.

WE NOW HAVE

members in the University's cumulative giving society, the THE CHANCELLOR'S CIRCLE:

members in the

SIR MAURICE O'RORKE SOCIETY

which recognises giving of more than \$5 million,

members in the SIR GEORGE FOWLDS SOCIETY

> which recognises giving between \$1 million and \$5 million, and

members in the SIR DOUGLAS ROBB SOCIETY

which recognises giving between \$100,000 and \$1 million.

GENEROUS

WERE RECEIVED FROM

15 donors.

THESE GIFTS ARE SUPPORTING:





INSTITUTE







ARTS STUDENTS IN NEED OF







CANCER RESEARCH HEART RESEARCH





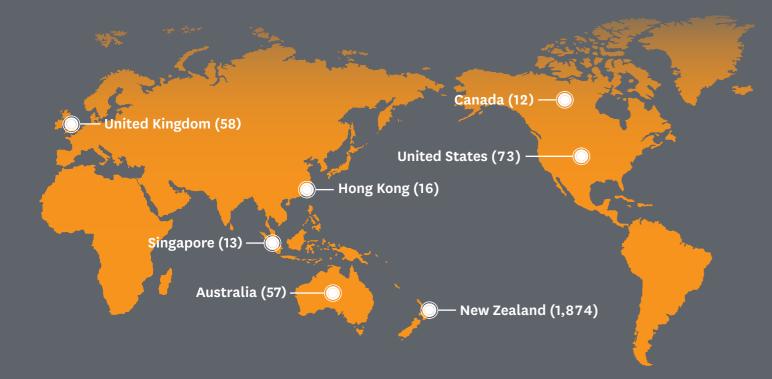
IN SCIENCE

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DONATIONS CAME FROM SUPPORTERS IN

26 countries.

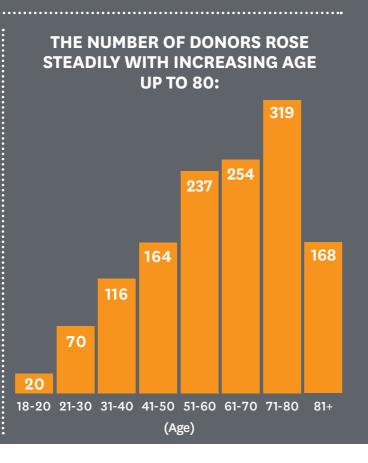
The largest number (1,874) came from New Zealand, followed by the US, the UK, Australia, Hong Kong, Singapore and Canada.





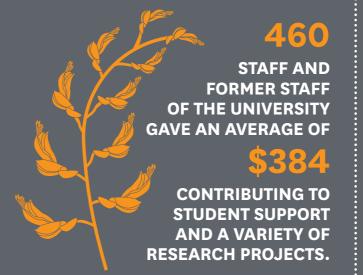
WAS RECEIVED THROUGH THE US AND UK FRIENDS OF THE UNIVERSITY OF AUCKLAND.

THIS INCLUDED A GENEROUS BEOUEST **AND MANY GIFTS SUPPORTING RESEARCH AND SCHOLARSHIPS.**



THE MEDIAN GIFT **FOR 2022 WAS**





THE NUMBER OF GIFTS GIVEN THROUGH ONLINE GIVING WAS

THROUGH 1,332 DONORS, **CONTRIBUTING**

OUR ANNUAL GIVING PROGRAMME RAISED A TOTAL OF \$582,815

for a range of appeals including emergency funding for students and support for PhD student research.

A TOTAL OF

2,036 DONORS MADE 4,059 GIFTS.

44% of our 223,102 alumni ENGAGED WITH US -THROUGH GIVING FINANCIALLY, THROUGH VOLUNTEERING ACTIVITIES AND THROUGH EVENTS AND COMMUNICATION. IN-PERSON EVENTS SAW A BIG INCREASE IN 2022.











	Volunteering	Alumni Connect	Physical Events	Virtual Events	Virtual Book Club
2019	902	243	7,283	0	0
2020	718	889	4,549	1,897	0
2021	829	909	8,784	1,180	472
2022	903	579	12,311	1,092	562

FINANCES

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Thank you for your generous support

Thank you to all our generous donors for contributing to what was a very successful year of philanthropy for the University – in spite of the challenging economic environment in New Zealand and globally.



At year end we had received \$56,116,674 from 2,399 donors. Each and every one has made an important contribution, supporting discovery and scholarship at the University.

In 2022 we saw exceptionally strong support for academic chairs and fellowships across many disciplines, especially in health and medicine, fuelling the work of some of our most outstanding researchers.

I particularly want to note the extraordinary support from the 13 donors who gave \$1 million or more in 2022. Many of these provide ongoing funding and are the backbone of significant programmes of work.

Included among the largest gifts were two generous bequests, one to support research into movement disorders and the other for visiting fellowships.

On a sad note, I want to acknowledge Geoff Ricketts, CNZM, who died in March 2023, after 20 years of exceptional leadership and service as Chair of the University of Auckland Foundation. Geoff was an integral part of the success of the Foundation, overseeing substantial growth of the endowment fund over two decades. He was a longstanding and generous supporter of the University and will be remembered warmly.

Ngā mihi nui,

PROFESSOR DAWN FRESHWATER

Vice-Chancellor, the University of Auckland



It is always heartening to look back on the year and see the impact that philanthropy has made on our people and our work.

Among the highlights for me was the progress in the area of precision medicine, moving from a one-size-fits-all approach to highly targeted and individualised treatment. We again had a year of tremendous support for our students, with more donors giving for scholarships and student projects than for any other area. Another particularly exciting achievement was the launch of the University's new marine science research vessel, Te Kaihōpara (the explorer). Please read on to find out more about these and other stories showing the impact of giving.

Our financial reporting pages have been expanded this year, including information about how our Foundations operate and the Trustees' goal to balance optimal investment returns with best practices of responsible investing.

I am personally deeply saddened by the death of Foundation Chair Geoff Ricketts, as I know are many members of our University community. Geoff was a highly respected leader and a loyal supporter. We were fortunate to have had the benefit of his considerable expertise over 20 years, as Chair of the Foundation and Chair of the leadership committees of two major University fundraising campaigns. He will be missed by fellow Trustees, friends and alumni.

Ngā mihi,

MARK BENTLEY

Director, Alumni Relations and Development



GEOFF RICKETTS, CNZM - OBITUARY It is with sadness that the University learned

of the death of alumnus and Chair of the University of Auckland Foundation, Geoff Ricketts, CNZM, in March 2023.

Geoff graduated LLB(Hons) in 1970 and began his career at law firm Russell McVeagh, where he worked for 25 years, becoming a senior partner and chair of the board. Over the decades he held directorships in more than 200 companies including some of this country's best known.

When the University of Auckland Foundation was established in January 2000, Geoff was the establishment Chair and retained the position of Chair until his death. He guided the Foundation with considerable skill through the global financial crisis of 2007-2008 and the Covid-19 market crash of 2020 and under his stewardship the Foundation has become an integral financial supporter of the University's people and research.

He was a member of the University Business School Supporters Council, the Law School Innovation and Development Committee and chaired the campaign committees of the University's – and New Zealand's – two most successful fundraising campaigns. Geoff and wife Fran included gifts to the Law and Business Schools through their own philanthropy.

The University made Geoff an honorary fellow in 2006 and awarded him an honorary doctorate in 2016.

The University of Auckland

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marine science research

The launch of the University of Auckland's new marine science research vessel, *Te Kaihōpara* (the explorer), is being hailed as a step change in capacity to improve understanding of the marine environment.

With the ability to deploy increasingly sophisticated equipment like cameras and remotely operated vehicles to explore coastal and continental shelves, the 15.9 metre aluminium vessel also has ample deck space that allows for up to 20 students to participate.

"We can make it a much more lived experience, because one of the big problems with marine ecosystems is that for many people they're out of sight and out of mind," says Professor Simon Thrush, Director of the Institute of Marine Science.

Te Kaihōpara also signifies a decade of support by one of its major donors, the German philanthropist

Dr Beate Schuler, who co-founded a successful pharmaceutical company in Ireland with her father and also funds universities in Germany and Ireland.

Having identified New Zealand as a "safe haven" for property investment, Beate was inspired by Auckland's marine science research and the need to do something for oceans that are being overfished. "I wanted to support excellence, that was clear, and the University of Auckland is an outstanding university on a world scale," she says.

As a member of the University's Sir Maurice O'Rorke Society, which recognises donations of more than \$5 million, Beate has funded a series "Her funding has been important in allowing us to do risky science which is not necessarily what the Government wants to see," says Simon. "It's about the future of all of us, because one way and another we all rely on the ocean."

of initiatives primarily through the *Oceans of Change* project which has addressed challenging research questions about kelp forest restoration, understanding crayfish habitats and assessing the value of marine protection to the wider snapper population in the Hauraki Gulf.

"Her funding has been important in allowing us to do risky science which is not necessarily what the Government wants to see," says Simon. "It's about the future of all of us, because one way and another we all rely on the ocean."

From its base at the Leigh Marine Laboratory, the Institute has also fostered an ongoing relationship with the local iwi, Ngāti Manuhiri, regarding their concerns about overfishing which has led to a rāhui being imposed to protect shellfish beds from exploitation.

Of particular interest are the waters around Little Barrier Island (Hauturu), where an evidence-based case is being built that aligns with iwi aspirations to ring the island with a marine protected area that restores ecology and biodiversity. "It provides us the opportunity to build collaborations and networks such as with Ngāti Manuhiri because we now have something to go to the table with," says Simon.

Another goal is to extend the relatively small but highly successful marine reserves around Leigh and Tāwharanui so that adult crayfish and snapper can safely venture further out into the Gulf for food – without being caught. "This would be one of the greatest joys for me because they have proven that they need an extension and that they need more reserves, and I think it's moving in the right direction," says Beate.

Having an engaged and enthusiastic donor like Beate who cares about what scientists are doing is another positive according to Simon. "She questions what we do. She opens up discussions about how we might progress things. So she's a participant in the process and super-valued because of that."



Professor Simon Thrush and Dr Beate Schuler

Annual Report to Donors 2022

For Beate, it's also about intellectual stimulation. "I always say to donors, if you take an interest in what you support it will be fun for you. It's a privilege to be talking to the brightest people in our society and that has given me great pleasure."

Recognised with an Honorary Doctorate of Science in 2019, Beate has funded the careers of numerous PhD and postdoc students through a variety of scholarships which Simon says creates pathways for researchers into more permanent employment and "creates a legacy of contribution to make the world a better place".

Another objective of the Oceans of Change initiative is to build 'ocean literacy' by expanding the role of the Leigh Discovery Centre to enable greater participation from poor and resourcelimited schools - particularly in South Auckland and Northland. As Beate puts it, "universities realise that they're not sitting in a castle with thick walls, they have to go out. They have to inform, they have to engage society".

Beyond marine science, Beate also supports the Faculty of Education and Social Work and the Centre for Green Chemistry where Co-Director Professor James Wright says her funding has been essential in driving research into the "looming issue" of pure-water availability.

The main focus is on removing 'compounds of concern', like agrochemicals, flame retardants, pharmaceutical ingredients and other endocrinedisrupting compounds that aren't being destroyed by conventional water-treatment processes. "There's now a recognition that humanity needs to treat this waste water before it's discharged into the environment," says James.

The goal is to develop a special membrane embedded with iron catalysts that can purify vast quantities of water, and James says they now have a robust principle that works well. "The research is making big inroads into helping to produce new methods for purifying water in a very simple and effective way."

Seed funding provided by Beate has attracted a Marsden grant in a closely related area, and she's also supported four PhD students who James says have been exposed to the ideas and concepts behind green chemistry. "In fact two of them have gone out into academic positions, so they'll be spreading the word to a very wide audience."

And when it comes to results, Beate says it's more about education than commercial success. "Research of course is important to produce results, but for some students the educational benefit in doing scientifically clean and proper research is part of a good education."

STEM Online opens pathways

One notable success through funding from Beate Schuler is STEM Online NZ, a free resource with interactive learning content and videos to support teachers and students. The aim is to increase participation and success in physics, chemistry and mathematics and, through this, expand entry into STEM (Science, Technology, Engineering and Mathematics) study and careers.

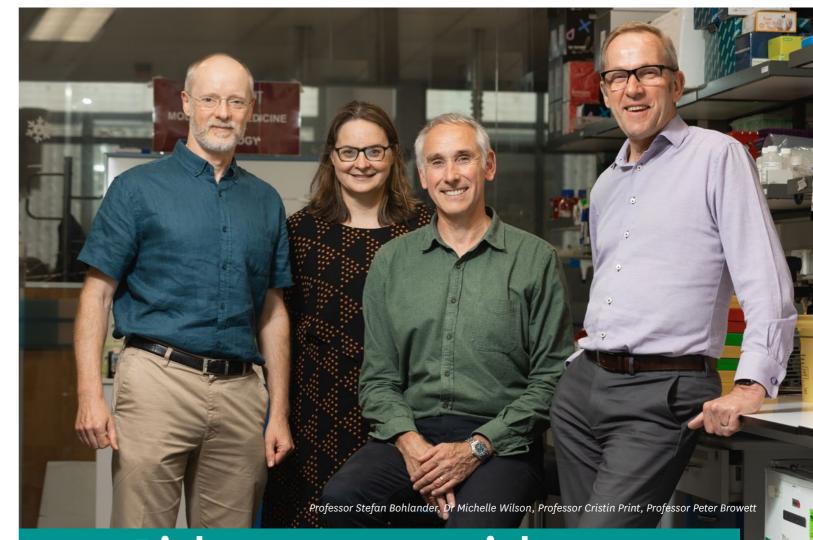
"Education is close to my heart and that's why I supported STEM Online when the project was introduced to me," says Beate. Having had difficulties in physics, she says she benefitted from watching one of the videos. "I understood something in physics which I hadn't understood before, I thought it was great!"

As the academic leader of the programme since its inception in 2016, Emeritus Professor Graeme

Aitken says that it's given students access to relevant, engaging and challenging content that's aligned with the New Zealand qualification system. "We have been able to open pathways for more students to participate in an increasingly scientific and technologically global society."

STEM Online has also proved its worth since Covid struck. Enrolments have more than doubled to now involve more than 10,000 students and 139 schools, and Beate is thrilled that the Ministry of Education saw the potential and got behind the initiative by funding its expansion into digital technologies.

"That was to me a great satisfaction - somebody had realised, okay that's working and we're going to jump on the boat and finance another course."



Right treatment, right person: precision medicine in action

right now

"The ultimate drive for a scientist," says Cristin Print, Professor of Molecular Medicine and Pathology at the University of Auckland, "is the idea of finding something no-one else has ever found before that has an impact on the world and the people in it."

This is happening right now at the University of Auckland for a team conducting research on cancer using the principles of precision medicine. Not only are they making discoveries, they are also able to apply this new knowledge in ways that are already benefiting patients.

"Precision medicine," says Dr Michelle Wilson, medical oncologist and clinical director for cancer and blood research, "is about providing the right treatment for the right patient at the right time.

"We often call it 'the great unknown'. We certainly know a lot more now than we did a couple of years ago, but every time we learn more, we discover more about what we don't know. It's an everevolving field and the patients are playing a vital role in creating the knowledge that drives that momentum."

The multidisciplinary research team comprises physicians, clinicians, clinical trialists, biomathematicians, computer scientists, experts in genetics, genomics and bioinformatics, based in the University of Auckland and Te Whatu Ora Te Toka Tumai Auckland, both forming part of the Auckland Academic Health Alliance.

"It's such a complex field that all of these are needed," says Professor Print, who adds that an eminent team of this kind could not have been brought together without substantial funding at a level that ensures the continuity that allows for forward planning. These researchers would not be able to coordinate their investigations and sustain them at the required level of excellence without the generous enabling gift of \$11 million from Lynne Erceg, augmented by smaller gifts from other generous donors.

"The team doesn't just feel gratitude," says Professor Print. "It's much more than that. It's the profound awareness that this support allows us to make new discoveries that are life-changing for New Zealanders and others all over the world."

So what is precision medicine and how are the Auckland cancer researchers adding to the rapidly evolving pool of global knowledge?

There is one piece of knowledge that underlies it all.

"Cancer is caused by genetic mutation," says Stefan Bohlander, Marijana Kumerich Chair in Leukaemia and Lymphoma Research in the Department of Molecular Medicine and Pathology. "Even when a virus triggers the cancer, what it sets in motion is a change in DNA."

"So one important focus of our research is on identifying tumour cells and investigating their mutations, with the ultimate aim of developing treatment in the form of drugs that can target their vulnerabilities."

Cancer researchers, when following the principles of precision medicine, use the patient's genetic information to help guide their individual care and treatment - alongside a range of other data specific to that person.

An important part of the work, says Professor Bohlander, is to identify the patterns of mutation in the tumours of individual patients, in order to

classify the cancer they have and choose the best treatment, including new drugs that target only cells carrying specific mutations, and not other

FOLINDATIONS

A significant tool from the University of Auckland was developed here in 2019 and has been continually refined since then, with ongoing support from Lynne Erceg. This is the myeloid gene panel, now comprising 110 genes known to play a role in acute myeloid leukaemia (AML), a blood cancer with which 200 New Zealanders are diagnosed every year.

Another essential tool, used in cancer research centres all over the world and implemented in Auckland in 2022, is a similar gene panel comprising 500 genes that can guide the treatment of solid cancers such as melanoma, gynaecological, breast or lung cancers.

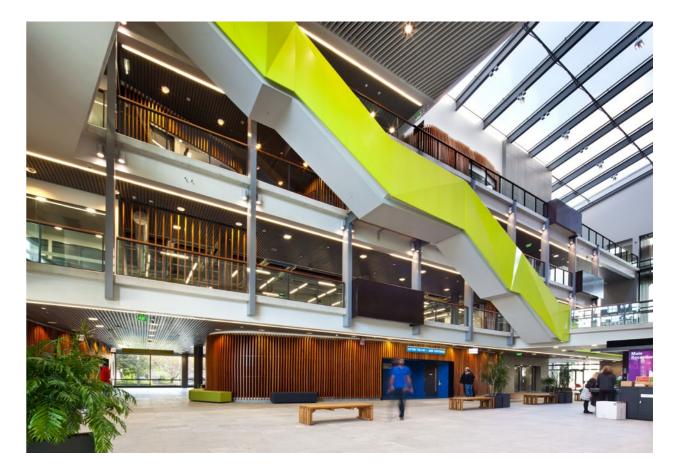
One of the most prominent success stories of precision medicine is the treatment of chronic myeloid leukaemia (CML), which is caused by a particular mutation and used to be invariably fatal. Now, with a one-pill-a-day treatment developed in the 1990s - which precisely targets this particular mutation - CML patients can expect to live normal life spans.

At the present time, with AML, another blood cancer still frequently fatal, notable progress is being made. AML, unlike CML, is associated not with just one but with multiple mutations, some of which are as yet unknown. The patient's prognosis is strongly affected by which mutations are involved.

Haematologist Peter Browett, Professor of Pathology in the Department of Molecular Medicine and Pathology, says newly gained knowledge is already having an impact on the treatment of AML in ways that can lengthen, enhance or save patients' lives.

"In almost every patient we can now identify 'driver' genes," he says, "the mutations that are causing the leukaemia and driving the abnormal growth."

"One of our research fellows has now analysed the first 100 AML patients, who have all received a precision mutation analysis using our myeloid gene panel. In 30 percent of patients we changed the prognostic group of the leukaemia and recommended changes to therapy based on those findings.



"Patients who perhaps were going to be treated with chemotherapy alone might be shown to have a molecular profile that predicts a high risk of relapse. That means we would look to do a stemcell transplant early on, to have a higher chance of cure."

Another focus in precision medicine is on our genetic heritage. Our inherited genes can make us more susceptible to particular cancers, influence our responses to anticancer drugs, or affect our reactions to their side effects. Knowing about these inherited genes can help clinicians make decisions about the best possible treatment for their particular patients.

For example, a brand-new piece of knowledge that has resulted from the myeloid gene panel analyses and is described by one researcher as having that "wow" factor - is that three to five percent of AML patients have inherited a gene from their parents that is associated with acute leukaemia.

This discovery is changing global thinking on AML. Not only does it throw into question a longestablished belief – that AML has no hereditary component, apart from in a few rare paediatric conditions. It also suggests an immediate change in the way of selecting stem-cell donors: that close family members should not be chosen without undergoing tests to make sure they have not, themselves, inherited that gene.

One of the research team's aspirations, which is being brought closer by advancing technology but would also require more research personnel, is to conduct genomic sequencing and interpretation of both the "normal" and cancer cells of every cancer patient that comes into their care.

Another is to ensure that Māori and Pākehā are partners in this field. This is already integrated into a range of clinical trials and studies in Auckland, such as a Māori Lung Cancer Cohort study, the Molecular Screening and Therapeutics (MoST) clinical trial and the Rakeiora Cancer Genomic Medicine Research Pathfinder Study.

Precision medicine is having a powerful impact on cancer research. It is also making its mark on other areas of medicine such as paediatrics, heart disease and ophthalmology, all of which have active research and clinical trials underway in Auckland.

New knowledge is being created and lives are changing as a result, which means the dream of the research teams is in action right now.



engineering workforce

The University of Auckland Faculty of Engineering's Apollo programme has lift-off.

But unlike NASA's Moon-landing programme of the same name, the University's mission doesn't involve leaving Earth's atmosphere but is aimed at boosting the numbers of Māori and Pacific engineering graduates.

On board with this five-year mission budgeted to cost \$2.1 million are several donors who collectively fund it to the tune of \$1.1 million. They include The Dines Family Charitable Trust, Fisher & Paykel Healthcare Foundation, the Estate of John W Turnbull, and Engineering alumni through the Auckland University Engineers Association endowment fund. The remaining \$1 million will come from a number of corporate donors and partners from the engineering sector, and the Faculty.

Apollo's Kaiārahi, or navigator, is Steve Roberts who began developing it and the accompanying Genesis programme four years ago. Whereas Genesis, which helps secondary students who are struggling with the maths and physics needed to get into engineering, was severely disrupted by Covid, Steve says the fourth Apollo programme under way now is steering 50 students into the discipline and aims to have 100 by October 2023.

"Apollo starts with Year 12s who are going into Year 13," says Steve, "and what we know is that 60 percent of Māori and Pacific students will not go from Year 12 maths into Year 13 calculus." Calculus is a required subject for engineering.

Steve says a combination of factors cause the drop-off, including students' lack of awareness of careers that rely on maths and those jobs' earning potential, a shortage of calculus teachers and the streaming of 'high-risk' Māori and Pacific students away from maths because schools are wary of recording poor NCEA results.

"In Apollo, we bring them in after the Year 12 exams and give them exposure to the differentiation part of the NCEA level 3 maths course even before they head into Year 13."

That does a number of things.

"It enables them to connect to the engineering school and understand where the maths fits, it puts them ahead of the curve before Year 13 and it allows us to go back to schools where students would have been streamed out and say, 'This student passed the Apollo exam and you need to move him or her back into level 3 calculus."

With students having sacrificed two-thirds of their summer holidays to do the programme, Steve says the University is trying to persuade the New Zealand Qualifications Authority to include Apollo achievements in NCEA result transcripts.

The student commitment extends beyond four weeks over the summer to further Apollo learning sessions in the April, July and October school holidays.

Steve, a former professional baseball player in the US who went on to become a talent scout, says engineering as a career doesn't get the marketing benefits medicine and law enjoy from numerous TV drama series. Nonetheless, Apollo is working.

In 2022, when overall first-year engineering enrolments were almost five percent down, Māori and Pacific enrolments increased slightly from 100 to 101. Without 17 students from the 2021 Apollo programme choosing engineering, first-year Māori and Pasifika enrolments could have fallen 17 percent.

Steve expects about 60 percent of the present Apollo cohort to go on to be engineers. Female students make up about 30 percent of those in the programme. Many of those who don't choose engineering will choose science instead and that, according to Steve, is also a great result.

Past participants are enthusiastic about and appreciative of the programmes, one saying Apollo set him on the right subject track for civil engineering and another saying he doesn't know where he would have got in his "fight" to do computer-systems engineering without Apollo.

Peni Tata, a 2019 Genesis alumnus who in 2023 is in his final year of mechanical engineering, credits the programme with enabling him to meet the degree's entry requirements.

"It was an amazing opportunity."

Now, helping extend the same opportunity to other students by working on the Apollo programme, he sees Steve opening their eyes to engineering's career possibilities, in particular by bringing their cultural heritage to the profession.

"He talks to them about situations such as developing a road or a bridge that might have ethical issues - for example, its effect on local iwi and making sure those interests are represented.

"For the communities students come from and go back to, it's a great investment."

Dean of Engineering Professor Gerard Rowe says whereas more than a third of school-age children are Māori and Pacific, they represent just under ten percent of University of Auckland engineering students. The country's engineering workforce is made up of only six percent Māori and two percent Pacific people.

"At a time when New Zealand, and indeed the whole world, is facing a shortage of skilled engineers, we simply cannot afford to overlook the talent and perspective of such a significant and growing part of the population."

With donor support, the faculty and front-line staff have developed a strategy through to 2026 that will substantially increase the programmes' reach and delivery to many more schools, including in regions outside Auckland. The goal is for more than 200 students to succeed through Apollo each year, up from only 50 in the past.

"The Genesis and Apollo programmes are key to addressing historic barriers and challenges and significantly increasing the number of Māori and Pacific students studying engineering at the University," the dean says. ■

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Over the course of 2022, Professor Christine Woods established the Business School's first research and teaching centre to focus on women and entrepreneurship.

The Aotearoa Centre for Enterprising Women was officially launched in October and has a raft of high-impact research and teaching initiatives lined up for 2023.

It also acts as a hub for business insiders, successful women and government agencies to engage with the next generation of enterprising women.

It's hugely important, Christine says, as it will empower more women to become successful entrepreneurs in an environment that favours men.

"It's not only a gender issue but an economic one too," says Christine, who is a leading expert on gender inequity in business.

"Females have a much tougher time raising capital for new ventures than their male counterparts.

We really need to address that."

Having the backing of iconic businesswoman Theresa Gattung has been fundamental.

Christine is the inaugural Theresa Gattung Chair in Women and Entrepreneurship, a newly created role that leads the Centre, made possible by a \$2.5 million cash injection from the former Telecom CEO.

"I admire Theresa for what she has achieved in a male-centric industry, and for bringing her knowledge, experience and financial resources to advocate for women in business."

"With her support, this initiative is set to create real change, as more needs to be known about the specific experiences of women entrepreneurs in New Zealand," Christine says.

While there are more women growing businesses and commercialising research than ever before, sexism persists for women-led ventures, particularly when it comes to capital

"Numerous studies have shown that women-run businesses deliver greater returns on investment than those led by men. The benefits of closing the gender gap for enterprising women are significant."

Further support, from the Chau Hoi Shuen Foundation, has been put toward research.

Christine has assembled a team of ten outstanding female academics at the Centre to explore the different issues women entrepreneurs face, and how things could be improved.

The Centre's Deputy Director, Dr Janine Swail, has previously completed research into the unique challenges women face as they hunt for new investors to expand their firms.

She will continue this theme at the Centre by exploring how women can better engage with entrepreneurial finance.

Christine is leading her own study with New Zealand Trade and Enterprise, researching the barriers for female exporters to internationalise or scale-up.

Other research themes include the issues women face in SME and family businesses, social entrepreneurship, Māori entrepreneurship, and access to entrepreneurship education.

On the teaching side, the first MBA course focused on women and entrepreneurship was introduced in 2022, and Christine will deliver a new undergraduate course on the same topic in 2023.

She has taught entrepreneurship and Māori entrepreneurship at the Business School since 2001, however this is the first time women and entrepreneurship has been offered as a subject.

Christine's own interest in entrepreneurship stretches back to more than 20 years ago, after she completed a stint in Malawi as a small business advisor.

"I became hooked on the passion and energy that entrepreneurs bring to what they do," she says.

This led to a PhD on women and entrepreneurship and an academic career which has included contributing to two books and more than 40 journal articles. Christine also directs the owner/ manager programme at the Icehouse venture capital firm, and is a founding director of Māori Maps (maorimaps.com), a website that provides a gateway to the tribal marae of Aotearoa New Zealand.

"I'm really fortunate that I'm able to do this," Christine says. "But I'm also disappointed that 20 years after I completed my PhD, we are still talking about gender inequality in business. I really thought my research would be a dead end, yet here we are." ■

Encouraging enterprise in women's prisons

Dr Persephone de Magdalene is embarking on a project in the Centre for Enterprising Women to encourage entrepreneurship in women's prisons. Christine will mentor the project as her research

Persephone is a post-doctoral fellow and has a background in women's social entrepreneurship and sustainable business practice.

"I'm interested in prisons as incarcerated women tend to have limited access to training opportunities, and the training they can access is highly gendered, and mostly focused on unskilled work," Persephone says.

"Often women have children, so their ability to support their families while on a low wage will

be challenging, and increases their chances of returning to prison, often resulting in separation trauma for their children."

Persephone is in the early stages of her fellowship and is looking at how to deliver entrepreneurial education in prisons in a way that is both empowering and culturally sensitive.

She also hopes to collaborate with similar research programmes in Canada, Finland and the UK.

"We're trying to create international as well as domestic impact in terms of raising awareness of the issues that face women entrepreneurs in different spheres and in all sorts of different ways."

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edge research across the life span In 2010, the American billionaire and philanthropist, Julian Robertson, established

a set of postdoctoral fellowships for exceptional early career researchers at the

University of Auckland. The goal of the fellowships, now numbering 22, was to "preserve the University's leading-edge medical research capabilities and the resulting

benefits to society through the development of new

The fellowships were exceptional: they were financially generous and, perhaps most importantly, were awarded for a minimum of three years. For researchers working in academia, the postdoctoral years are the most uncertain and securing grants to undertake meaningful projects can resemble a lottery. Dr Peter Freestone was awarded one of the first neurological fellowships through the Centre for Brain Research (CBR).

"I think the time the Aotearoa Foundation Fellowship gives you can't be underestimated,"

he says. "In a worst case one-year grant, almost before you've begun the project you are starting the lengthy process of looking and applying for the next grant. That three years was very good."

Now, ten years later, the direction of his current research in Parkinson's disease can be traced back to projects in his original application: "It's studying Parkinson's disease, it's using cuttingedge technologies to study brain networks affected by the disease, always with the aim of looking for and identifying possible new treatment strategies." Julian Robertson once asked him if he had cured Parkinson's disease. "I had to sorely disappoint him but assure him I was still working on it!"

For Australian-born exercise scientist Dr Sian Williams, who took up her fellowship at the Liggins

Institute in 2021, the impact was immediate. "To be blunt, I probably wouldn't be in New Zealand without it," she says. The grant that supported her role in a Centre for Research Excellence project in the Faculty of Medical and Health Sciences was coming to an end. Her area of research has always been in cerebral palsy, especially with children and rehabilitation. Over time she moved to working with younger and younger children until she "accidentally fell into the area of early diagnosis of cerebral palsy". The Liggins Institute fellowship opened the door to tracing the early development of babies born with a high risk of cerebral palsy as well as a broader and largely overlooked group of babies born moderate-to-late preterm.

Dr Soroush Safaei, a principal scientist at the Auckland Bioengineering Institute (ABI) and founder of the Virtual Brain Project, is equally direct. When asked whether he would be in the position he is now without his fellowship, he replies, "Absolutely not. That would have been impossible because the one thing we don't have in academia is job security and funding security. This fellowship gave me peace of mind for four years." During that time, he built the foundation for a brain research group, something the Institute's director, Distinguished Professor Peter Hunter, had always wanted. In a research organisation known worldwide for its modelling of the organs of the human body, the brain was the only organ without a dedicated research group.

Soroush and his colleague Dr Gonzo Maso Talou now lead a 15-strong team recruited over the past

One of the primary goals of the fellowships' founder, the late Julian Robertson, was that the science should benefit society. Each of the researchers talks of that connection, its influence and importance.

"It's really easy as a researcher to become siloed," Sian says. "You read all the articles and look at the numbers but none of that means anything unless it's meaningful to the person you're doing the research for. It's really important for us to involve people with lived experiences at all stages of our research."

She talks of a project she co-designed where families with a child recently diagnosed with cerebral palsy and the clinicians involved talk together through the trauma of that emotionally tough time. "It really helped guide where we went next." Another study, which looks at the growth of muscle and function across the first year of life in babies born preterm, full term and those with a high risk of cerebral palsy, has never been done before. "We don't even know what normal muscle growth and the relationship with motor development looks like in typical babies, let alone babies born preterm. And I know why now," she adds laughing. "It's difficult to do."



treatments".

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Dr Soroush Safaei

She is also collaborating with scientists at ABI and CBR on different ways of analysing muscle movement in children with cerebral palsy and how to automate the process. Instead of spending hours looking at videos of hundreds of babies, a video could be loaded into a computer programmed to detect a risk of cerebral palsy. The potential for earlier diagnosis is huge and the impact worldwide.

Peter Freestone's research has always been based broadly on Parkinson's disease. He admits his initial attraction was love of science and discovery, of questions we don't have the answers to and where, with the right preparation, you can design an experiment to try to find an answer. But as he learnt more of Parkinson's disease there were added attractions. "There's nothing for sharpening the mind like speaking to a room full of people who are suffering from the disease you are trying hard to cure or alleviate." The other is a more personal journey - a close family friend who has the disease, seeing them and their family struggle with it and the desperation to try almost anything.

Then late last year he met with colleagues who have identified a very rare form of Parkinson's disease. "Genetic causes of Parkinson's disease contribute only a very few cases globally.

This is a real anomaly. There's a gene mutation that leads to a great number of cases in the Pacific population, and it is early onset so it's even more devastating. They live with the disease far longer." The game plan now is to find money to begin experiments to understand this singular form.

For Soroush Safaei, his focus on Alzheimer's disease is a very personal story. He was at high school in Iran when his grandmother developed Alzheimer's. Soroush followed her progress to the end, 15 long years. Most of the research was from one angle almost exclusively - clumps of the protein amyloid beta in the brain tissue - and in two decades there were no breakthroughs. However, Soroush, along with a few other researchers, have been taking a different approach, looking into the role of blood flow and hypertension.

Modelling the brain was a way to start putting together the pieces of a very complex problem to see if he could predict which part of the brain is being affected and when. The virtual brain now has a role in a three-year clinical study in collaboration with Mātai, the new not-for-profit research MRI centre in Gisborne. Starting in 2023, they will monitor changes in 50 people with symptoms of early-stage dementia. The study is another outcome of his Aotearoa Fellowship.

So too are new opportunities. He has been offered a contract in Europe with one of the largest pharmaceutical companies working in oncology. "When I presented what I did in the past four years in building a new research group, they were amazed. They said, just come here and start working for us." He smiles broadly. "There's a lot to weigh up but I will come back to ABI. I'm not going to lose this connection."

It would seem Julian Robertson's ambitions for the fellowships – to keep research at the University operating at the highest level and contributing to improved health in society - is being realised not just in New Zealand but internationally.

Julian was a generous donor and friend to the University and a wonderful champion for New Zealand globally. Over many years, Julian's generosity supported exciting new research into some of the most complex medical and technological challenges.

Julian Robertson, KNZM, died in August 2022. In 2009 he was awarded New Zealand's first honorary knighthood for services to business and philanthropy. The University of Auckland awarded him an Honorary Doctorate in Law in 2018.

Striving for a more just society

Merciana Fernandes and Nikita Sionetali are committed to making New Zealand a more fair and just society.

The students, who were the inaugural recipients of the Raye Freedman Trust Undergraduate Award, are determined to use their education to make a meaningful impact on Aotearoa's justice system.

Named after Raye Freedman, a Canadian-born philanthropist who moved to New Zealand in 1941 and died in 2006, the Raye Freedman Trust Undergraduate Award was established in 2019 and provides support for three years to two Bachelor of Arts or Bachelor of Arts conjoint students who are experiencing financial hardship.

Merciana completed her BA in 2022 with a double major in Criminology and Psychology. She is now set to begin a Bachelor of Science (Honours) majoring in Psychology and hopes to eventually work for a government organisation such as the Department of Corrections or the Ministry of Justice. With a particular interest in youth justice and restorative justice, once she has completed her studies Merciana aspires to dive into these issues at the grassroots level and eventually play a role in shaping the country's policy in these fields.

"It's about working with communities on how outcomes can suit them better, taking a bottomup approach," she says.

"I'd like to see policy influenced by those in our communities who have first-hand experience working with people who offend."

Nikita also dreams of playing an active role in shaping New Zealand's justice system. She is currently in her fourth year of a conjoint Bachelor of Laws and Arts degree with a double major in Sociology and Criminology and has her sights set on becoming a lawyer, with her ultimate dream being to become a judge.

Nikita, who is Samoan, Niuean and New Zealand European, says she has a particular interest in tackling systemic racism in Aotearoa and the inequality faced by many Māori and Pacific people here.





"In order to see a systemic change, we must start small by educating those around us on these issues, addressing and shutting down the subtle racism that happens in our communities every day," she says.

Having attended a low-decile high school and being the first in her family to enter university, Nikita says she hopes her journey can also inspire other young Pacific women to follow their dreams.

Both Nikita and Merciana describe the support they received from the Trust as being a "blessing" and say it has strengthened their desire to serve and help

"The award not only helped me financially, but it also boosted my confidence to know there are essentially strangers who believe in me so much they have spent their hard-earned money on helping to make my dreams come true," says Nikita.



Scholarship supports future Pacific Island doctors

Medical students Cecilia Koloamatangi and Frances Vehikite are on a mission to improve the health outcomes of their communities, while also increasing Pacific representation in the health sector.

The fourth-year students, both of whom are New Zealand-born Tongans, are two of the 2022 recipients of the John and Rose Dunn Scholarship for Pacific Island Medical Students.

"There are no better people to really treat or help your own people than your own," explains Cecilia.

The 21-year-old says she had an interest in medicine ever since she first saw a stethoscope as a young child and thought "that's pretty cool, I want a job that uses that". The defining moment that inspired her to pursue a path in medicine, however, came a number of years later when her

grandfather was hospitalised. After seeing the actions of a Tongan nurse who went out of her way to care for her grandfather – staying after her shift ended to spend time with him and helping with extra tasks such as interpreting – Cecilia says she witnessed first-hand just how important it is to have healthcare workers from one's own community.

"She didn't even know our family at all," recalls Cecilia. "I think the love she had for our [Tongan] community and our people kind of inspired me to come to that pathway of health." "I'd really love to take my dad home and to be able to work in the communities that he grew up in back in Tonga because I know healthcare isn't amazing back there. It'd be really nice to go back to the people and communities that raised me and my family and contribute there."

Frances, 29, says that although she had a fascination with medicine from a young age, her desire to become a doctor was influenced by her experience attending medical appointments with her parents when they had just arrived in New Zealand. Seeing how confusing and overwhelming the healthcare system can be for those members of our community facing language or cultural barriers, Frances realised the impact a familiar face could have on patients.

"It's just like once [patients] see a doctor or a healthcare worker looks like them, they're more comfortable to open up," she says.

Although both women have yet to decide exactly what direction they will take with their medical studies, Cecilia says her long-term dream is to one day return to Tonga and practise medicine in the islands.

"I'd really love to take my dad home and to be able to work in the communities that he grew up in back in Tonga because I know healthcare isn't amazing back there," she says. "It'd be really nice to go back to the people and communities that raised me and my family and contribute there."

The scholarship is funded by philanthropists
John and Rose Dunn. John is of Cook Island
ancestry, through his great-great-grandmother,
and is the founder of Endoscopy Auckland and
Laparoscopy Auckland. In 1990, he was also the
first New Zealand surgeon to perform laparoscopic
cholecystectomy. Knowing the pressures of
medical school first-hand, he hopes the financial
support the scholarship provides will play a role in
boosting the number of Pacific doctors by helping
more students complete their studies.

"If you look at the stats, it's pretty obvious that we need to increase the number of Pasifika doctors who can potentially care for their people," he says, adding that "for people to really get in and make a difference they need to be able to speak the language – literally and figuratively".

Both Cecilia and Frances say long hours studying combined with various family commitments leave little opportunity for part-time work during the semester, meaning the extra financial support has been a massive help.

"We're truly grateful for the help that the scholarship has given," says Frances. "It's taken a load off."

Cecilia echoes that sentiment, saying that by helping to alleviate some of the financial stress on her and her family, the support has allowed her to focus more on her studies.

For John and Rose, the scholarship is just one way they are giving back. Rose is a great supporter of Pacific artists while for almost two decades now John, who is an honorary medical adviser to the Prime Minister of the Cook Islands, has travelled to Rarotonga once a year to spend a week performing dozens of surgeries on needy patients. As well as being committed to improving the health outcomes of Cook Islanders, he was also a committee member of the University's Campaign For All Our Futures and currently serves as a trustee of the Medical and Health Sciences Foundation.

John recently met Cecilia and Frances in person, along with a number of other 2022 scholarship recipients, to find out more about their studies and to give them some words of encouragement.

"It's a good feeling when you have someone who's backing you," says Cecilia.

"It's kind of like his belief in us is showing us that we are the future generation of Pasifika doctors."

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A foundation for success

A mother-of-two has taken a step towards achieving her goal of becoming a social worker, thanks to the support of generous alumni and friends.



Prisila Sika is one of six 2022 recipients of the Alumni Scholarship for Tertiary Foundation Certificate Students, which is funded by donations made to the Alumni Scholarships Fund via an annual appeal. It offers financial support

to students who are beginning their first year of study after graduating from the Tertiary Foundation Certificate.

As a single parent raising two young girls, Prisila says receiving the scholarship played a significant role in easing the financial stress she faced while completing her first year of her Bachelor of Social Work while also reminding her to stay positive during a difficult time in her life.

"When I received this scholarship, I was fighting for my life with Covid-19 in hospital," she says. "In the midst of trials and a time of uncertainty, this award reassured me to always be hopeful even in my darkest days."

Despite the challenges posed by studying and raising a young family at the same time, the 26-year-old Tongan-born student, who is the first person in her family to attend university, says she hopes to set an example for her children that "you can do anything" if you work hard and persevere.

She's also committed to using her education to help others going through tough times.

"I am passionate about helping and giving back to the community."

The Annual Giving programme brings together many donors who want to support the same area, with results that have a significant impact:

The Annual Appeal saw the number of donors increase from

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The Chancellor's Circle recognises generous philanthropists who, over the years, have made important contributions to the University of Auckland. Partnerships with these generous supporters have provided opportunities for this country's most talented young people to gain a world-class education, whatever their financial circumstances, and for our researchers to create knowledge that will transform our futures.

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"None of this research would have happened without philanthropy as the base funding... it really allowed us to build a team and get the kind of feasibility established that said yes, we can do this."

- Medical and Health Sciences researcher

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Momentum Waikato Community Foundation

Morris Legal

MSA Charitable Trust

Mussel Reef Restoration Trust

Nadene Milne Gallery

Neuro Research Charitable Trust - Bernard and Kaye Crosby

New Zealand Aluminium Smelters Ltd

New Zealand Hospital Pharmacists Association

New Zealand Orthopaedic Association Trust

New Zealand Superannuation Fund

Norty Electrical and Rentals

NUS Press Pte Ltd

NZ Architects Co-operative Society Ltd

NZ Association of Optometrists Education & Research Fund

N7 Maori Tourism

NZ-UK Link Foundation

Oratia Health

Oxford University Press

Outstanding Performance

Pacific Lawyers' Association Inc

Pasifika Futures Limited

Paterson Burn Optometrists

Philip Hamlin Barrister

Powerco Limited

my heart, this opportunity is something I will never forget and always cherish."

- Law student

Property Institute of New Zealand

Prudentia Law Public Trust

Puke Ariki

Ralph and Eve Seelye Charitable Trust

Rapaura School

Raye Blumenthal Freedman Trust

RG Douglas Limited

Robertsons Robt. Jones Holdings Limited

Rockfield Trust

Neurological Foundation of New Zealand

Neuromuscular Research Foundation Trust

New Zealand Business and Parliament Trust

New Zealand Institute of Food Science & Technology Inc

New Zealand Lottery Grants Board

New Zealand Pharmacy Education and Research Foundation

New Zealand Society of Otolaryngology Head and Neck Surgery

New Zealand Walking Access Commission

Next Capital Services Trust Ngai Tahu Holding Corporation

Ngati Whatua O Orakei Maori Trust Board Nicholas Tarling Charitable Trust

Nicholaswilliams Limited

NZ Audiological Society Inc

NZ Society for the Study of Diabetes

Oakley Mental Health Research Foundation

Ovster Property Group

PaR nz Golfing Holidays

Penguin Random House NZ

Perpetual Guardian PG and WN Gillespie #2 Trust

Pindrop Foundation

Potter Interior Systems Ltd

"Thank you from the bottom of

Promapp Solutions Ltd

Puriri Downs Farm

Ouality Family Healthcare Ltd

Redhat

Rob Dewhirst Consulting Limited

Rosser Foundation

Ross Charitable Trust

Rotary Club of Newmarket Inc

Royal Aust & NZ College of Obstetricians & Gynaecologists Rua and Clarrie Stevens Charitable Trust

Saint Kentigern College

Save Sight Society

Schlumberger New Zealand Limited Shortland Chambers

Simplicity Foundation Southern Cross Migration Ltd

Southlodge Investments Limited Spencer Foundation

Spirit of Adventure Trust Staff Wives Book Group

Stantec New Zealand Studio John Irving Limited

Sublime Catering Surf Life Saving NZ Inc

Tamariki Pakari Child Health and Wellbeing Trust

"Your generous scholarship has provided me with the opportunity to develop and extend my education and establish knowledgeable life experience."

Arts student

Tap In Ventures Ltd Te Aitanga a Mahaki Trust

Telethon Kids Institute

The Angus Family Trust The Anne Reid Memorial Fund

The Bayleys Foundation The Braithwaite Thompson Educational Fund

The CatWalk Spinal Cord Injury Research Trust

The Chartwell Trust The Davies-Payne & Scott Family Trust

The Dines Family Charitable Trust The Fletcher Trust

The Focussed Manager

The Garnett Passe and Rodney Williams Memorial Foundation

The Allan & Joyce Ballantyne Medi & Surg Educ Research Trust

The Gerrard and Marti Friedlander Charitable Trust

The Goodfellow Foundation The Gordon Walters Foundation

The Gut Foundation The Hearing Research Foundation

The Institute of Quarrying NZ Inc The Kate Edger Educational Charitable Trust

The Heart Research Institute NZ Ltd

The Kelliher Charitable Trust

The Liver Trust

The Marie Clay Literacy Trust

The Masfen Foundation The McCall MacBain Foundation

The Nature Conservancy Trust (TNC) The New Zealand Room Ltd

The Sir Michael Jones Foundation

The New Zealand Statistical Association The Royal Australasian College of Physicians

The Royal New Zealand College of General Practitioners The Salvation Army

The Royal Australian and New Zealand College of Ophthalmologists

The Sir Thomas and Lady Duncan Trust The Starship Foundation

The Todd Trust

The UK Friends of The University of Auckland

The University of Auckland Society

The Wallath Trust

Tiger Brokers Timberlab Solutions Ltd

"The scholarship has allowed me to work less and focus on my studies a bit more."

- Commerce/Computer Science student

Tonkin & Taylor Total Ground Engineering

TR Group Ltd

Transportation Auckland Corporation Limited Trounson GK Trust

Two Rooms Gallery

U3A Epsom U3A Helensville

U3A Hobsonville U3A Ponsonby

UoA Case Club

Two Degrees Mobile Limited

UoA Medical School Alumni Club Valuers' Education & Integrity Foundation

Vision Research Foundation Charitable Trust

Waikato Medical Research Foundation Waiwetu Trust

Vernon Tews Education Trust

Warp Speed Computers Ltd Warren and Mahoney

Warren Architects' Educational Charitable Trust Watercare Services Limited

Weir Family Trust Wellcome Leap Inc.

West Rolleston Primary School Whitehall Technical Services Ltd

The William Chick Scholarship Trust William Demant Foundation

Winstone Wallboards Ltd Wood Industry Development and Education Trust

"This scholarship has been a tremendous financial help to me and I felt very honoured to be selected as a recipient."

Annual Report to Donors 2022

Woolf Fisher Trust

Arts student

Wright Family Foundation Wynette Griffiths Research Trust

Youthtown Zoroastrian Culture Shop

Xero Limited

Zuru Toys New Zealand Limited

The University of Auckland

The University of Auckland **Foundations**

The University of Auckland Foundation Group is responsible for receiving, investing and distributing gifts to support students, teaching and research at the University of Auckland.

The Group comprises the University of Auckland Foundation (Registered Charity CC10985) and the Medical and Health Sciences Foundation (Registered Charity CC30871).

Trustees of both boards meet four times a year to oversee and approve the use of gifts and the investment of funds, and other fiduciary duties. The Investment Committee meets quarterly to review investment policies and performance. It receives regular advice from its investment consultant, Cambridge Associates. The Audit Committee works closely with the Foundation's auditors (EY) to prepare the annual financial statements, manage risk and ensure processes are robust.

The University of Auckland **Foundation Trustees 2022**

Geoff Ricketts CNZM (Chair)

Roger France ONZM (Chair - Investment Committee)

Elizabeth Hickey MNZM (Chair - Audit Committee)

David Carter

Jonathan Mason

Dr Arthur Morris Sarah Roberts

Lyndy Sainsbury ONZM

The University of Auckland Medical and **Health Sciences Foundation Trustees 2022**

Dr Arthur Morris (Chair)

Associate Professor (Adjunct) John Dunn

Professor John Fraser

Darren Manning

Lyndsey Partridge

Dr Kathryn Philipson

Faye Sumner CNZM

Harry White

Thank you to our international board volunteers

The UK Friends and US Friends of the University of Auckland play a crucial role in supporting our alumni engagement and fundraising endeavours overseas. Our sincere thanks to the respective boards for their ongoing commitment and support of the University in 2022 and beyond.

The US Friends of The University of Auckland Board 2022

Dr Peter Rajsingh (Chair)

Tim Cameron

Professor Dawn Freshwater

Dr Lynette Jones

Dr Simon Talbot

The University of Auckland Board 2022

Eric Tracey (Chair)

Natalie Baragwanath

Matt Barrett

Lady Rosemary Buchanan

Michael Butler

Louise Chunn

Dr Seth Rankin

Jon Vollemaere

Robert Whitehouse



At 31 December 2022, the University of Auckland Foundation managed funds valued at \$352.9 million across the Current Use Investment Pool (CUIP) and the Endowment Investment Pool (EIP).

Current Use Investment Pool (CUIP)

At 31 December the CUIP had a closing balance of \$84.4 million.

The CUIP is invested in a range of investments, designed to maintain the value of the capital and ensure adequate liquidity to meet short and medium-term distribution requirements. The CUIP is primarily invested in 'defensive assets', including term deposits and fixed interest.

Endowment Investment Pool (EIP)

Each endowment gift received by the Foundations is invested into, and allocated its share of, the EIP which is structured for long-term growth while also allowing for some of the investment income to be distributed to support its intended purpose, be that a scholarship, research programme or academic position. Further details on how the fund is invested and its performance is provided on the next page.

money responsibly The Trustees seek to balance optimal

investment returns with the goal of creating a portfolio that follows the best practices of responsible investing. Trustees will appoint fund managers who apply the principles of responsible investment and have the appropriate policies and practices in place to do so.

The Foundation will not invest in funds that invest in companies that derive any revenue from fossil fuel reserves, illegal or nuclear weapons, or the manufacture of tobacco products.

The Foundation seeks to include sustainable investment managers when institutional quality options are known and available. Trustees favour such managers, assuming they demonstrate reasonably comparable investment characteristics relative to their non-sustainability peers.

Investment in fossil fuel reserves has now effectively been eliminated from the portfolio. As at 31 December 2022 only 0.008% of the Foundations' investments were held in companies deriving revenue from fossil fuel reserves.

DONORS

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Foundation Endowment Investment Pool Report 2022

After a decade which saw compounded returns of 10.7% per annum, 2022 was a more challenging year for the EIP.

Like similar funds, our assets were impacted by a range of global challenges including war, inflation, rising interest rates, energy price increases, and labour shortages, all of which led to the worst downturn in the financial markets since the GFC in 2008.

Against this difficult economic backdrop, the fund returned -10.0% in 2022, compared with the portfolio benchmark return of -9.8%.

The EIP is designed to fund long-term endowed philanthropic gifts. Therefore, while the decline in 2022 was unwelcome, it is important to remember that the fund is structured for long-term growth.



HAD A CLOSING BALANCE OF

\$268.5 million

THE ONE-YEAR **RETURN WAS**

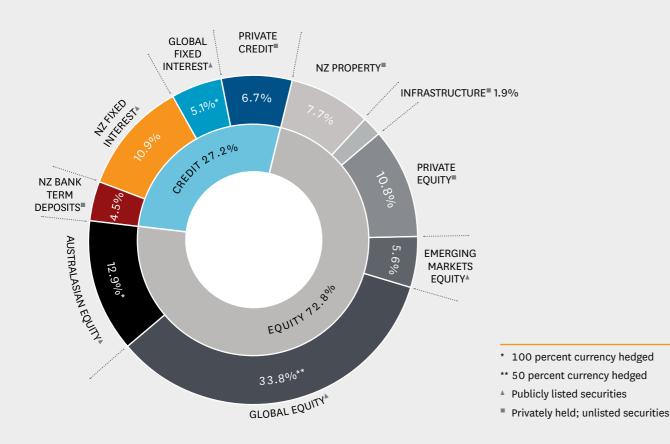
-10.0% p.a.

THE FIVE-YEAR **RETURN WAS**

5.8% p.a.

THE TEN-YEAR **RETURN WAS**





These returns are calculated at the pool level (by Cambridge Associates) using the industry-standard, modified Dietz method. This method calculates total pool returns on a monthly basis. Each underlying investment is valued individually and a monthly weighted average return is calculated. Monthly pool returns are then calculated into annual returns on a time-weighted basis.

The EIP is managed economically by the Foundation. It charges no fees for the internal management of the bank term deposits. The total fees charged by external managers amount to no more than 0.84 percent per annum of the EIP's average monthly balance.

The EIP represents the bulk of the Group's equity; the balance is made up of its current use and specified investment pools and operating accounts.

Summary Financial Statements

In 2022, the University of Auckland Foundation and Medical and Health Sciences Foundation (together, the "Group") received \$34.2 million in gifts, and made distributions of \$20.4 million.

Consolidated Summary Statement of Comprehensive Revenue and Expense For Year Ended 31 December 2022

	GROUP	*
	2022 \$,000	2021 \$,000
Gifts and Legacies	34,230	27,835
Investment Gain	(30,461)	36,966
Reversal of impairment loss on Entrepreneurial Challenge investment	-	34
Operating Expenses	(1,058)	(640)
Distributions and Grants	(20,377)	(31,888)
Total Comprehensive Revenue and Expense for the Year	(17,666)	32,307
	\$,000	\$,000
	2022	2021
Equity at the Beginning of the Year	321,166	288,859
Total Comprehensive Revenue and Expense	(17,666)	32,307
Equity at the End of the Year	303,500	321,166
Consolidated Summary Statement of Financial Position As at 31 December 202	9	
	2022 \$,000	2021 \$,000
Current Assets	29,826	35,271
Non Current Assets	330,770	346,445
Current Liabilities	(57,096)	(60,550)
Net Assets	303,500	321,166
Represented by:		

*University of Auckland Foundation and Medical and Health Sciences Foundation combined

The figures contained in these consolidated financial statements do not include philanthropic income received directly by the University of Auckland and only reflect cash received in that financial year.

These summary financial statements have been extracted from the Group's 2022 audited financial statements but are themselves unaudited. They are provided to give interested persons a succinct overview of the Group's financial performance. The full and audited financial statements (which give a more complete understanding of the financial performance, financial position and cash flows of the Group) are available online at "www.uoafoundation.org.nz" or may be requested in writing from Paul Cunningham, Foundations General Manager, Alumni Relations and Development, The University of Auckland, Private Bag 92019, Auckland 1142.

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