THE ARMSTRONG AND ARTHUR CHARITABLE TRUST FOR LESBIANS

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 MARCH 2025

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DIRECTORY as at 31 March 2025

Nature of the Trust	Charitable Trust
Date of Settlement	17 September 2001
Postal Address	P O Box 199, Waikanae 5250
Settlor	Beatrice Blanche Arthur (deceased 5/8/2002)
Trustees	A J Laurie FTCL, BA(Hons), Cand.Mag.(Oslo), PhD (deceased16/8/2024)
(Minimum 3, Max 10)	L C Evans NZCLS, BA(Hons)
	E R Walsh BSc(Hons), ISSP, CISA
	R Evans
	F M Kell BA, BSc(Hons), PhD
	V R Edyvane LACert, Dip.Edit., BA(Hons), MA, PhD
	G A Gale DipTchg, LACert (resigned 25/5/2024)
	J V Glamuzina MA(Hons), CITPNZ, PMP®
Officers	Chair V R Edyvane
	Secretary F M Kell
	Treasurer F M Kell
Bankers	ANZ Bank, Waikanae
Solicitor	Julie Goundar The Law Connection PO Box 206, Waikanae 5250
IRD No.	81-490-023
Registered Charity No.	CC10947

The Armstrong and Arthur Charitable Trust for Lesbians
Performance Report
for the year ended 31 March 2025

Entity Information

Legal Name of Entity: The Armstrong and Arthur Charitable Trust for Lesbians

Type of Entity and Legal Basis: Charitable Trust (Incorporation no 1180824)

Registration Number: CC10947

Entity's Purpose:

The purposes and aims of the Trust are to devote or apply both capital and income of the Trust Fund to or for any charitable purposes for the benefit of lesbian community groups in the Wellington region or individuals organising projects that benefit the lesbian community in the Wellington region, such purposes which are from time to time selected by the Trustees are valid charitable purposes.

Without limiting this in any way such purposes may also include:

(a) education, research, and social development;

(b) assistance of lesbian individuals and lesbian community groups and services which benefit the lesbian community such as helplines, library facilities, radio programmes, art exhibitions and theatre productions, and other cultural activities intended to further community development; and

(c) provision of other services such as rehabilitation and health activities. Subject to clause 2.2(ii) the Trust may also devote or apply both capital and income of the Trust Fund to a separate fund to further charitable purposes for the benefit of lesbian women living in New Zealand.

Entity Structure:

The Trust operations are managed by the Trustees. The Chair, Secretary, and Treasurer are appointed by the Trustees, from the Trustees.

Main Sources of the Entity's Cash and Resources:

The Armstrong and Arthur Charitable Trust for Lesbians was established in 2001 by the late Bea Arthur for the benefit of lesbian community groups in the Wellington region. The Trust capital is made up of the settlement amount and subsequent bequests.
The main source of revenue for the Trust is income derived from the Trust Fund capital investments.
From time to time the Trust receives donations, which are treated as capital and/or income at the direction of the donor. If no direction is received, the Trustees determine how to apply the donation.

Main Methods Used by the Entity to Raise Funds:

The Trust is not an active fundraiser. The donations and bequests it receives generally are unsolicited.

Entity's Reliance on Volunteers and Donated Goods or Services:

The Trust relies on gifts of volunteers' time. All the Trustees are volunteers.

The Armstrong and Arthur Charitable Trust for Lesbians

Statement of Service Performance

For the year ended 31 March 2025

Description of the Entity's Outcomes:

The outcome sought by the Trust is that the lesbian community is a visible presence in the Wellington region through supporting activity by lesbian community, for the lesbian community, and with the lesbian community.

Description and Quantification (to the extent practicable) of the Entity's Outputs:

	This Year Actual	This Year Budget	Last Year Actual
Trust Deed compliance: Annual General Meeting Meetings of Trustees	 1 2	 1 3	 1 1
Legislative compliance: Charities Register Annual Return due by end September	Filed September 2025	File by due date	Filed September 2024
Support to: Lesbian community groups for on-going programmes Lesbian community group projects Individual lesbian projects	 1 1 1	 1 1 0	 1 1 0

The Armstrong and Arthur Charitable Trust for Lesbians

Statement of Receipts and Payments

For the year ended 31 March 2025

	Notes	Actual This year	Budget This Year	Actual Last Year
		$	$	$
Operating Receipts	2			
Donations, fundraising, and other similar receipts		2,083.00	1,000	2,319.06
Interest, dividends, and other investment income receipts				
ASB Term Deposit interest		1353.69	1,000	1,081.77
BNZ Term Deposit interest		13,535.71	9,000	11,130.06
ANZ Current Account interest		207.89	150	239.71
ANZ Serious Saver Interest		269.87	150	277.16
BNZ Business First OnCall interest		0.24	0	0.24
Repayment of grant		0	0	0
Total Operating Receipts		**17,450.40**	**11,300**	**15,048.00**
Operating Payments	3			
Payments related to providing goods or services:				
Registration Fees		439.55	250	95.46
Annual Report publication		83.00	150	108.60
Stall at LILAC Fair		0	0	0
Grants paid:		13,238.00	12,000	9,000.00
Other operating payments:				
Storage		1,800.00	1,800	1,800.00
General expenses		550.00	200	100.00
Total Operating Payments		**16,110.55**	**14,400**	**11,104.06**
Operating Surplus or (Deficit)		**1,339.85**		**3,934.94**
Capital Receipts		0		0
Capital Payments		0		0
Increase/(Decrease) in Bank Accounts and Cash		**1,339.85**		**3,934.94**
Bank accounts and cash at the beginning of the financial year		**300.311.13**		**296,100.54**
Bank Accounts and Cash at the End of the Financial Year		**301,650.98**		**300,311.13**
Represented by:				
Current account		14,074.31		13,892.10
Savings and OnCall accounts		7099.94		6,589.83
Term Deposit accounts		280,476.73		279,829.20
Total Bank Accounts and Cash at the End of the Financial Year		**301,650.98**		**300,311.13**

The Armstrong and Arthur Charitable Trust for Lesbians

Statement of Resources and Commitments

as at 31 March 2025

SCHEDULE OF RESOURCES

	This Year	Last Year
	$	$
Bank Accounts and Cash (from Statement of Receipts and Payments)	**301,650.98**	**300,311.13**
ANZ Term Investment	0	0
ASB Term Investment	25,000.00	25,000.00
BNZ Term Investment	255,476.73	254,829.20
ANZ Current Account	14,074.31	13,892.10
ANZ Serious Saver	7,089.72	6,589.83
BNZ Business OnCall	10.22	9.98
Other Resources		
Stock on Hand – Cards expensed in year purchased	0	0

SCHEDULE OF COMMITMENTS

	This Year	Last Year
	$	$
Money Payable by the Entity		
Other Commitments:		
Grant 2024/01	1,500.00	0

SCHEDULE OF OTHER INFORMATION	This Year	Last Year
	$	$
Grants or Donations with Conditions Attached (where conditions not fully met at balance date)	-	-
Resources Used as Security for Borrowings	-	-

The Armstrong and Arthur Charitable Trust for Lesbians
Notes to the Performance Report
For the year ended
31 March 2025

Note 1: Accounting Policies

Basis of Preparation
The Armstrong and Arthur Charitable Trust for Lesbians is permitted by law to apply PBE SFR-C (NFP) Public Benefit Entity Simple Format Reporting - Cash (Not-For-Profit) and has elected to do so. All transactions are reported in the Statement of Receipts and Payments and related Notes to the Performance Report on a cash basis.

Goods and Services Tax (GST)
The Armstrong and Arthur Charitable Trust for Lesbians is not registered for GST. Therefore amounts recorded in the Performance Report are inclusive of GST (if any).

Note 2: Analysis of Receipts "How was it funded?"

		This Year	Last Year
Receipt Item	**Analysis**	**$**	$
Fundraising receipts	LILAC Fair	0	0
	Sale of items	0	61.00
	Total	**0**	**61.00**
Receipt Item	**Analysis**	$	$
Grants and donations			
	Donation	2,000.00	2,000.00
	Donations	83.00	162.60
	Donation	0	95.46
	Total	**2,083.00**	**2,258.06**
Total donations, fundraising, sales, etc.		**2,083.00**	**2,319.06**
Receipt Item	**Analysis**	**$**	$
	ANZ Serious Saver	269.87	277.16
	ASB Term Investment	1,353.69	1,081.77
	BNZ Term Investment, + OnCall	13,535.95	11,130.3
	ANZ Current Account	207.89	**239.71**
Total interest and dividends		**15,367.40**	**12,728.64**

Note 3: Analysis of Payments

		This Year	Last Year
Payment Item	**Analysis**	**$**	$
Payments related to public fundraising	LILAC Fair	0	0
	Total	**0**	**0**
Payment Item	**Analysis**	**$**	$
Payments related to providing goods or services	Annual Report	83.00	108.60
	Reviewers Fee	0	0
	Charities Registration Fee	51.11	51.11
	Website Fee(s)	388.44	95.46
	Legal fees	0	0
	Printing cards	0	0
	Total	**522.55**	**204.06**
Payment Item	**Analysis**	**$**	$
Grants and donations paid	Grants:		
	Oral history	1,738.00	0
	Lilac	7,000.00	6,000.00
	Lesbian Summer Camp	4,500.00	3,000.00
	Total	**13,238.00**	**9,000.00**
Payment Item	**Analysis**	**$**	$
Other operating payments	General expenses:		
	Flowers, gifts, etc.	0.00	0.00
	Stationery	0.00	0
	Postage	0.00	0
	Storage	1,800.00	1,800.00
	Miscellaneous	550.00	100.00
	Total	**2,350.00**	**1,900.00**

Note 4: Correction of Errors
Incorrect amounts used in preparation of the 2024 report were corrected here for last year's figures.

Note 5: Related Party Transactions
There were no transactions involving related parties during the financial year. (Last Year - Nil)

Note 6: Events after the Balance Date
There were no events that have occurred after the balance date that would have a significant effect on the Performance Report. (Last Year - Nil)

Note 7: Additional Notes

Source of capital

	As at 1 Apr 2024	As at 31 Mar 2025
Bequests	$	$
Original Settlement	100,000.00	**100,000.00**
Estate B Arthur	100,000.00	**100,000.00**
Estate B Dean	60,000.00	**60,000.00**
Estate F M Kinney	15,345.44	**15,345.44**
Estate P Simmonds	1,000.00	**1,000.00**
	276,345.44	**276,345.44**
Donations		
DOODS Funds*	1,226.85	**1,226.85**
Lesbian Line Funds	270.19	**270.19**
Lesbian Haven Funds	651.82	**651.82**
Lesbian Studies Conference Funds	6,776.83	**6,776.83**
	8,925.69	**8,925.69**
Total	285,271.13	**285,271.13**

*condition of use – grants must be aligned to DOODS Committee objectives

Accumulated funds

	$
Accumulated funds carried forward from previous year	15,040.00
This year operating surplus	1,339.85
Accumulated funds as at 31 March 2025	16,379.85
Equity as at 31 March 2025	**301,650.98**
Adjustment for commitments:	
Commitments as at 31 March 2025	1,500.00
Accumulated funds	16,379.85
Equity including commitments as at 31 March 2024	**301,650.98**

The Armstrong and Arthur Charitable Trust for Lesbians

Treasurer's Report

for the year ended 31 March 2025

The Trust is a Tier 4 organisation as its turnover is less than $125,000. The Performance Report meets the annual reporting requirements needed for Charities Registration compliance. Tier 4 organisations are not required to undertake an annual audit or review of their accounts; the Trust's Deed was amended accordingly (11 March 2019).

Term investments that matured during the year were rolled over for the same terms. Interest rates increased early in 2024 but have since decreased.

All investments were made in accordance with the Trustees Investment Policy.

During preparation of this financial report it was discovered that some incorrect amounts had been used in the 2024 report. The 2024 report was reworked, and the amended amounts are given as last year's figures in this report.

Frances M Kell
Treasurer

CHAIR'S REPORT FOR THE YEAR ENDED 31 MARCH 2025

Alison Jean Laurie 20.4.1941-16.08.2024

During this reporting year, the Trustees were deeply saddened to learn of the death of Trust Co-Founder Alison Laurie on 16 August 2024 in Copenhagen, Denmark, where she had been living. A memorial service for Alison was held on Sunday 13 October at the Pines in Houghton Bay, Wellington. This was attended by current and former Trustees. The occasion was a fitting tribute by representatives of the lesbian and gay communities, as well as an opportunity for other friends, former colleagues and family to share some of their memories of Alison. All reflected on Alison's numerable talents that included: political activist, writer, broadcaster, historian, scholar, teacher.

Alisons's influence on gay and lesbian political activism in Aotearoa/New Zealand, beginning in the early 1970s, was considerable. The following decades also saw her energetic involvement in numerous lesbian initiatives, particularly in the Wellington Region. In 2001, Alison and Bea Arthur founded The Armstrong and Arthur Charitable Trust for Lesbians on behalf of Bette Armstrong and Bea Arthur. Alison was also the Trust's first Chairperson. She attended her last Trust meeting in February 2023.

Alison and Bea Arthur during a visit to Huka Falls. Image by Linda Evans, 2001.

For a number of years the chief recipient of Trust funding has been LILAC Inc (Lesbian Library and Archives Centre). On 15 September 2024, LILAC marked its 30th Anniversary in a special celebration in the LILAC Lounge that included a birthday cake (with candles). Guest speaker Jan Jordan spoke about writing her book *Snorkelling the Abyss*. Trustees Fran and Valda attended the afternoon.

On 19 November 2024, Valda joined a webinar hosted by Charities Services that is now part of the Department of Internal Affairs. Basically, the webinar outlined the statutory requirements under the Charities Amendment Act 2023 for Charities to review their governance procedures at least every three years. The requirement came into effect on 5 October 2023.

Trustees were delighted to receive an invitation from the organisers of the Lesbian Summer Camp to visit the camp for lunch and afterwards speak about The Armstrong and Arthur Charitable Trust for Lesbians. On the sunny Sunday of 2 February 2025, Fran and Valda arrived at the Waihōanga River Lodge and Retreat that is located in lush bush in the Otaki River Gorge. After an enjoyable communal meal, we gathered in the downstairs lounge to talk informally about the Trust. Many of the lesbians present were unfamiliar with the Trust altogether while others thought that it had folded. We reassured them that, although limited by the funds available for grants, the Trust continues to contribute towards lesbian activities.

Valda Edyvane
Chair

GRANTS PAID 1 April 2024 to 31 March 2025

Lesbian Summer Camp 2025

$4,500.00

Contribution towards running costs of camp.

LILAC Inc

$7,000.00

Contribution to rent on premises.

Oral history project

$1,738.00

Costs of specialised recording equipment for a Wellington lesbian history project.

REPORTS FROM GRANT RECIPIENTS

It is a condition of all grants that a report is provided to the Trust at the conclusion of the project or, for on-going activities, at six-monthly intervals. Information provided here is taken from those reports.

Lesbian Summer Camp 2025

The camp was held at the same welcoming venue that hosted us last year. This annual event is designed to offer a restorative space where lesbians can come together to connect, celebrate, and engage in meaningful, in-person interactions. It fosters opportunities for sharing experiences, strengthening relationships, and building a sense of community across regions.

This year's camp included attendees from outside the Wellington region, a testament to the enduring reach and relevance of the camp. Participants enjoyed engaging discussions, lively dancing, and quiet moments in the natural surroundings. Conversations flowed easily over coffee, and the warmth of community was felt around every shared meal. The camp felt well supported, both philosophically and financially, by the aims of the Trust, and attendees appreciated two of the Trustees joining them for a meal and telling them more about the Trust.

LILAC Inc

In September 2024 members of LILAC celebrated their 30-year anniversary with an author talk by Jan Jordan, two brief talks about the library's herstory, and birthday cake. During the period around the actual anniversary, there was a wall-mounted clippings exhibition, Portrayal of Lesbians in the Print Media 1994–2024, in the library.

Other one-off events held during the year included exhibition openings, and a movie afternoon showing two lesbian classics, complete with popcorn and lollies, at a private boutique theatre. In addition to the regular monthly Book Group events, there are now monthly meditation, coming out, and discussion group sessions. All of these single and regular events are organised and run by members of the annually elected collective.

The grants received from the Trust is integral to enabling LILAC to continue to provide an accessible, centrally located, physical space in which the library can operate. The collective is most appreciative of this support.

The Wellington Lesbian Oral History Project

After purchase of the equipment, work was carried out to identify areas to be covered in interviews and develop the questions to be asked, and to establish conditions of access to the final information. Potential participants in the study were sought and interviews were expected to begin in May 2025.

WEBSITE REPORT

During the year the Trust's website was browsed by people from several countries. Approximately 70% of these were in the United States of America, 20% in New Zealand, 6% in the United Kingdom, and a few in each of Canada, Australia, Germany, and Indonesia. Most of the activity took place in the first quarter of 2025. An analysis of operating systems that were used by visitors to the website indicated that most appeared to be browsing on their phones. Main areas of interest were about making a bequest, applying for a grant, and news items. There was also interest in information about Betty Armstrong and Bea Arthur themselves, as well as about the Trust generally.