

# Fulbright New Zealand ANNUAL REPORT 2019





# 2019

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*Pictured: Fulbright New Zealand annual awards ceremony hosted by Rt. Hon Minister Winston Peters at the Parliament Banquet Hall June 2019.*

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## OUR MISSION

*The mission of the Fulbright programme is important - now more than ever – as we strive to create mutual understanding and empathy in our world through people to people connections.*





# CHAIRPERSON'S REPORT



Welcome to the Fulbright New Zealand Annual Report for the 2019 financial year. This was my first year as chairperson after being elected in March 2019 but not my first experience with Fulbright. In 1984 I attended Harvard Law School as a Fulbright New Zealand awardee and in 2009 I became a member on the Fulbright New Zealand Board. As an alumnus and a board member for over ten years, I have some understanding of the importance of the Fulbright mission to our grantees and to the world.

In 1948, a bilateral treaty was signed between the New Zealand and United States governments establishing the Fulbright New Zealand programme. New Zealand was one of the first countries to sign on to the Fulbright programme and now, some 70 years later, we have more than 3,000 alumni who are recognised as forward-thinking creatives, great scientific minds, the future of their industries and thought leaders in both countries.

According to Senator Fulbright, the Fulbright programme was designed “to bring a little more knowledge, a little more reason,

and a little more compassion into world affairs and thereby to increase the chance that nations will learn at last to live in peace and friendship.” Senator Fulbright’s vision for a world of peace and friendship is just as important now.

Fulbright New Zealand values the person-to-person diplomacy achieved as part of the Fulbright experience, alongside the values of empathy, trust, teamwork, and independence. These characteristics are what make Fulbright grantees leaders not only in their different disciplines, but in their wider communities as well.

Within this Annual Report you will learn more about the inspiring people who have received Fulbright New Zealand awards this year.

Fulbright NZ has been blessed in the past year with the Ministry of Foreign Affairs and Trade doubling our baseline Treaty funding to be largely directed into both doubling the number of NZ graduate awards to the US and the support to our incredibly talented awardees. The US Department of State’s Bureau of Education and Cultural Affairs also came in to match our New Zealand government increase to support the introduction of second year funding for our New Zealand graduates in the US. Fulbright NZ is so much better placed to deliver on its mission as a result of this increased support.

My thanks to all of our sponsors addressed later in this report for their continuing support. Thanks also to Fulbright NZ board members and to the Fulbright NZ team led by Penelope Borland.

# EXECUTIVE DIRECTOR'S REPORT



It has been an incredible and full year, filled with firsts for Fulbright New Zealand including the global rebrand of Fulbright, the launch of the Fulbrighter App, the successful pilot of the Fulbright New Zealand Alumni Returnee programme, and sending off the first New Zealand graduate cohort to the US who were able to benefit from our increased funding. The New Zealand graduates who went to the US in 2019 had the opportunity to receive up to US\$30,000 for second year funding in addition to increased first year support and we are delighted with this major enhancement of our New Zealand graduate programme.

This year we focused on strengthening the Fulbright brand and the Fulbright New Zealand alumni network. I was able to attend the official launch of the Fulbright rebrand at the Senate in Washington DC alongside a global Fulbright Executive Directors’ Meeting – a truly historic event being the first rebrand of the Fulbright Programme ever and in the wonderful Kennedy Caucus Room at the Senate which has seen so many historic events. The refreshed brand is designed to convey the distinguishing features

of the Fulbright programme to attract the best applicants from all backgrounds.

Not long after the launch of the rebrand, the Fulbrighter App was launched. The app allows our Fulbright alumni across the world to connect and share in a more accessible way. We also successfully piloted an Alumni Returnee programme for recently returned New Zealand graduates. We hope that the Alumni Returnee Programme, along with the Fulbrighter App, help emphasize and deepen the Fulbright experience and continue it long after the actual scholarship.

Behind our amazing grantees and wonderful alumni network, are our partners, board members and campus advisors around New Zealand. With this support, we are able to ensure our grantees have a quality experience. I am incredibly thankful for the Fulbright Staff who work extremely hard to prepare both our incoming and outgoing grantees for a meaningful Fulbright experience and for the extensive work that goes into the planning and execution of our events, outreach and promotion to attract a brilliantly diverse group of applicants for our awards. Thank you also to our board members chaired in the year by Harlene Hayne followed by David Patterson.

In the coming year we are introducing programmes to bring the work of our US grantees in New Zealand to a wider audience and piloting alumni driven seminars to encourage alumni to share their knowledge and expertise.





# THE FULBRIGHT PROGRAMME

## HISTORY OF THE PROGRAMME

The Fulbright programme was established in 1946 as an initiative of US Senator J. William Fulbright, to promote mutual understanding through educational and cultural exchanges between the US and other countries. Informed by his own exchange experience as a Rhodes Scholar, Senator Fulbright believed the programme could play an important role in building a lasting world peace in the aftermath of World War II.

In Senator Fulbright's words, the programme aims "to bring a little more knowledge, a little more reason, and a little more compassion into world affairs and thereby to increase the chance that nations will learn at last to live in peace and friendship." This goal has always been as important to the programme as individual scholarship.

The New Zealand-United States Educational Foundation (trading as Fulbright New Zealand since 1999) was set up by bilateral treaty between the governments of New Zealand and the United States of America in 1948 to administer the Fulbright programme in New Zealand. New Zealand was the fifth country to join the programme. Fulbright

New Zealand is jointly funded by the US and New Zealand governments with additional funding from award sponsors, private philanthropists and alumni donors.

The Fulbright programme has been described as one of the largest and most significant movements of scholars across the face of the earth and now operates in over 155 countries, funding around 8,000 exchanges per year for participants to study, research, teach or present their work in another country.

Since 1948 more than 1,800 New Zealanders and 1,500 Americans have received Fulbright awards under the New Zealand programme. Worldwide, the Fulbright programme has assisted more than 300,000 people from over 190 countries to study, research and teach abroad.

The programme has produced numerous remarkable alumni internationally, many of whom have gone on to make significant contributions to scholarly knowledge and public life.



*“International educational exchange is the most significant current project designed to continue the process of humanizing mankind to the point, we would hope, that men can learn to live in peace....We must try to expand the boundaries of human wisdom, empathy and perception, and there is no way of doing that except through education.”*

- SENATOR J. WILLIAM FULBRIGHT

Pictured Top Right: US Graduate Award Grantee Joshua Ferrer hiking in New Zealand. Centre: Fulbright US Distinguished Teacher Susannah Remillard overlooking the cable car in Wellington, New Zealand. Bottom: NZ Science and Innovation Graduate Award Grantee Mitchell Chandler at a climate workshop in Wellington, New Zealand.





Fulbright New Zealand is currently operating under the 2019–2022 Strategic Plan. For the purposes of this report, we will outline the vision, mission, and values that encompass the four overall goals in this plan.

Fulbright New Zealand enables global understanding through educational and cultural exchanges between the United States and New Zealand.

Our mission is to deliver Senator Fulbright's aim of international goodwill through transformative and influential awards that enrich NZ-US relations and open doors for tomorrow's leaders.

## VALUES

Academic, Professional and Personal Excellence | Collaboration  
Collegiality | Fairness | Diversity | Leadership | Innovation  
Accountability | Celebration of Success | Global Connectivity  
Cultural Understanding | Our Whakapapa | International Goodwill



### GOAL 1: EXCELLENT EXPERIENCES

Objective 1: To deliver awards that are meaningful and transformative to each grantee.

Objective 2: To ensure that all applicants and grantees have an excellent experience of our processes and procedures.



### GOAL 2: FOSTER THE BRAND

Objective 3: To align outreach efforts with the Fulbright mission and reach a wider audience in a more accessible manner.

Objective 4: To celebrate and share inspiring, engaging stories through technologies and agile approaches to storytelling.

Objective 5: Refreshing Fulbright New Zealand brand.



### GOAL 3: DEEP ENGAGEMENT WITH ALUMNI

Objective 6: To invigorate and support an engaged alumni community both in NZ and the US through effective communication and relevant activities.



### GOAL 4: SUSTAINABLE RELATIONSHIPS AND PARTNERSHIPS

Objective 7: To sustain and strengthen current relationships across all sectors, with an emphasis on tertiary education providers, administrative partners and diplomatic & government agencies.

Objective 8: To evaluate and deepen current partnerships (e.g. Fulbright and Non-Fulbright award sponsors) and ensure mutual benefits.

Objective 9: To assess new partnerships, when appropriate, across all sectors to support Fulbright NZ's programmes and activities through increased revenue and engagement.



**FEBRUARY  
ORIENTATION**

Fulbright New Zealand's annual Orientation programme took place in Wellington at Waiwhetu Marae to welcome our 2019 cohort of grantees from the United States.

**MAY  
WOMEN IN STEM**

Hosted by Fulbright New Zealand in association with Tech Women New Zealand and Graduate Women New Zealand, Fulbright alumnae and women in STEM discussed their roles and shared insights to inspire learning and development for other women interested in STEM. The forum was hosted at Victoria University of Wellington, Pipitea Campus.

**MAY  
FULBRIGHT REBRAND**

On Tuesday 21 May, the Executive Directors of Fulbright Commissions all over the world gathered at the US Senate on Capitol Hill to celebrate the launch of the new Fulbright Brand. Executive Director Penelope Borland described the evening as, "a night filled with moving speeches that were a total reinforcement of Fulbright's absolute relevance in today's world of confluence of unprecedented challenges".

**JUNE  
AWARDS CEREMONY**

Fulbright New Zealand celebrated the 2019 cohort of grantees at our annual Awards Ceremony held Monday 17 June at Parliament's Banquet Hall in Wellington. This occasion was hosted by the Rt. Honourable Winston Peters, Deputy Prime Minister, Minister of Foreign Affairs and Trade, Minister of State Owned Enterprises, Minister for Racing, Minister of Disarmament and Arms Control.

**OCTOBER  
ALUMNI RETURNEE  
PROGRAMME**

This year we piloted a one day Returnee Programme for recently returned Fulbright New Zealand Graduate Award alumni. This programme was designed to wrap up their award experience and learnings, and facilitate looking forward in terms of goal setting, networking and advancing their careers in a New Zealand setting. Later in the evening, alumni were invited to present a short, dynamic presentation on their Fulbright experience at Fulbright's Lightning Talks Event at BizDojo in Wellington.

**NOVEMBER  
THANKSGIVING**

The Fulbright New Zealand team and US Graduates celebrated Thanksgiving with Ambassador Scott Brown and his wife Gail Brown at their residence.



NZ GRADUATE AWARDS

**Fulbright New Zealand General Graduate Awards** are awarded to promising New Zealand graduate students to undertake postgraduate study or research at US institutions in any field. The awards are valued at up to US\$40,000 (plus NZ\$4,000 travel funding), with the opportunity to apply for second year funding of an additional US\$30,000. Eleven awards were granted this year, more than doubling the number of grantees in 2018. Fulbright New Zealand Graduate Awards can be used towards a Masters or PhD programme, or grantees can participate as a Visiting Student Researcher (VSR). This allows grantees to spend between 6-12 months studying or researching a topic or proposed project in the US, usually as part of a degree programme within New Zealand.

The General Graduate Award is part of the Fulbright Foreign Student Program which operates in more than 155 countries. Approximately 4,000 students receive Foreign Student scholarships each year. Since the award was established, 784 New Zealanders have received a General Graduate Award, and an additional 235 New Zealanders have received partnership or programme specific Fulbright awards.

Picture Top Right: New Zealand Graduate Award grantees (left to right) Nandini Nair, Ribu Dhakal, Robert Schultz, Jack Davies, Henry Benson-Pope, and Melanie Puka at Fulbright Gateway Programme. Centre: New Zealand Graduate Award grantee Grace Francis. Bottom: New Zealand Graduate Award grantee Abbas Nazari.



2019 FULBRIGHT NEW ZEALAND GENERAL GRADUATE AWARDS

|  | FULBRIGHT HOST INSTITUTION | ALMA MATER*                                     |                                   |
|--|----------------------------|---|-----------------------------------|
|  | Sarah Alawi                | Harvard Law School                              | University of Auckland            |
|  | Hitaua Arahanga-Doyle      | Stanford University and Northwestern University | University of Otago**             |
|  | Dylan Asafo                | Harvard Law School                              | University of Auckland            |
|  | Henry Benson-Pope          | New York University                             | University of Otago               |
|  | Jack Davies                | New York University                             | University of Auckland            |
|  | Grace Francis              | Juilliard School                                | University of Auckland            |
|  | Emma McIntyre              | ArtCenter College of Design                     | University of Auckland            |
|  | Abbas Nazari               | Gerogetown University                           | University of Canterbury          |
|  | Melanie Puka               | Louisiana State University                      | Victoria University of Wellington |
|  | Robert Schultz             | Columbia University                             | University of Auckland            |
|  | Jessica Stubbing           | Harvard University                              | University of Auckland**          |

\*Alma Mater refers to the university, school, or college that one formerly attended  
\*\*currently pursuing degree

GRANTEE SPOTLIGHT:

DYLAN ASAFO

For his Fulbright award, Fuimaono Dylan Asafo will complete a Master of Laws at Harvard University, specialising in Critical Race Theory and minority rights.

Dylan graduated with a Bachelor of Law and Bachelor of Health Science from the University of Auckland in 2017, and a Masters of Law (First Class Hons) in 2019. He also helped establish MALOSI – the Movement for Action and Law to Overcome Social Injustice.

Dylan’s mother, Liliu Faletoease Asafo, has been a huge influence on his life and his study choices. She immigrated to NZ at the age of 19 on a nursing scholarship and inspired Dylan to pursue both law and health care in his own career.

Dylan says “Critical Race Theory recognises that racism is engrained in the fabric of society and is pervasive in dominant culture, including its laws. We need the tools to identify the socially constructed framework that upholds injustice, in order for us to bring about change.”

Credit NZ Law Society <https://www.lawsociety.org.nz>



US GRADUATE AWARDS

**Fulbright US Graduate Awards** are for promising Americans who wish to enroll in a graduate degree programme at a New Zealand university, carry out research towards a US graduate degree, or carry out an independent study/research project while being affiliated with a New Zealand higher education or research institution. They are open to any field of study/research. Grantees arrive in New Zealand in late January/early February of each year. Some New Zealand universities offer US Fulbright Graduate grantees the opportunity to apply for scholarships that will enable them to continue full-time studies in New Zealand beyond the 10-month Fulbright award. Over the course of their award, grantees will meet, work, live with and learn from the people of Aotearoa, sharing daily experiences.

Since the awards were first established, a total of 532 Americans have come to New Zealand on Fulbright US Graduate Award programmes. In 2019 there were seven grantees.

*Pictured Top: US Graduate Award grantee Molly Riley Knoedler.  
Centre: US Graduate Award grantee Joshua Ferrer and friends.  
Bottom: US Graduate Award grantee Octavius Jones.*



2019 FULBRIGHT US GENERAL GRADUATE AWARDS

|                      | FULBRIGHT HOST INSTITUTION        | ALMA MATER*              |
|----------------------|-----------------------------------|--------------------------|
| Hannah Dougherty     | University of Waikato             | University of Illinois   |
| Joshua Ferrer        | University of Otago               | Amherst College          |
| Octavius Jones       | Victoria University of Wellington | University of Wisconsin  |
| Molly Riley Knoedler | University of Auckland            | Williams College         |
| Ingabirano Nintunze  | University of Auckland            | University of Notre Dame |
| Rowena Schenck       | University of Otago               | Amherst College          |
| Rory Taylor          | University of Auckland            | Pomona College           |

*\*Alma Mater refers to the university, school, or college that one formerly attended*

GRANTEE SPOTLIGHT:

MOLLY RILEY KNOEDLER



Fulbright US Graduate Molly Riley Knoedler, from Sheboygan Wisconsin, credits Fulbright with setting her up for success. When she first arrived in New Zealand to complete a Master of Science in Applied Mathematics at the University of Auckland, her initial focus was on creating computational models of bee pollination. She hoped to expand this to birds, bats and even lizards. As her research evolved, her focus shifted to working on computational modelling of pollination by New Zealand honeyeater birds specifically tui, bellbirds and silvereyes.

Thanks to a University of Auckland Fulbright Scholarship (see External Awards p.33 for more details) Molly has been able to enrol for a second year at the University of Auckland. She was also fortunate to be awarded the Jean Heywood Postgraduate Scholarship which encourages and supports students undertaking a Master's degree in Mathematics or Statistics. Molly's hope is that her research will "further the symbiosis of applied mathematics and biology in an academic world increasingly driven by data and computational power." While being away from home has sometimes been challenging, Molly is grateful for her Fulbright experience. "Stepping away from the US and seeing events through the lens of outsiders has been interesting and illuminating."



US AND NZ  
SCHOLAR AWARDS

**Fulbright New Zealand Scholar Awards** are for New Zealand academics, artists or professionals to lecture and/or conduct research at US institutions for a period of three to five months. There were five recipients of this award chosen in the 2018 financial year. Scholars can be hosted by any eligible US institute, and must have a PhD or the equivalent professional or artistic training or experience.

**Fulbright US Scholar Awards** are for American academics, artists or professionals to lecture and/or conduct research at New Zealand institutions. Four awards are granted each year, towards three to five months of lecturing and/or research.

The US Scholar Program operates in more than 125 countries worldwide and offers over 500 teaching, research or combination awards each year. 1,052 Grantees have received a US Scholar Award to New Zealand since the awards were established.



*Pictured Top: US Scholars (left to right) Dustin Ballard, Yvonne Vadeboncoeur, and Peter Zazzali. Bottom: NZ Scholars (left to right) Susan Schenk, Fiona Armundsen and Nicola Daly.*

2019 FULBRIGHT US SCHOLAR AWARDS

|                     | FULBRIGHT HOST INSTITUTION                   | HOME INSTITUTION        |
|---------------------|--|-------------------------|
| Dustin Ballard      | University of Auckland and Starship Hospital | Kaiser Permanente       |
| Yvonne Vadeboncoeur | Cawthron Institute                           | Wright State University |
| Robert (Dave) Wells | NIWA   | Texas A&M University    |
| Peter Zazzali       | Toi Whakaari                                 | University of Kansas    |

2019 FULBRIGHT NEW ZEALAND  
SCHOLAR AWARDS

|                    | FULBRIGHT HOST INSTITUTION                 | HOME INSTITUTION                  |
|--------------------|--|-----------------------------------|
| Fiona Armundsen    | California Institute of the Arts           | Auckland University of Technology |
| Nicola Daly        | University of Arizona                      | University of Waikato             |
| Julia Horsfield    | University of California, Irvine and Davis | University of Otago               |
| Rangimarie Mahuika | University of Colorado                     | University of Waikato             |
| Annette Palliser   | Johnson and Wales University               | Southern Institute of Technology  |
| Susan Schenk       | University of Utah                         | Victoria University of Wellington |



GRANTEE SPOTLIGHT:  
PETER ZAZZALI

Peter Zazzali from Lawrence, Kansas was based at Toi Whakaari, Wellington's national drama school, for five months. Peter conducted research towards a sociocultural analysis of professional actor training in Anglophone countries.

“Of the many productive outcomes from my residency, building relationships with colleagues was among the most salient. I greatly valued the chance to share ideas and collaborate with peers from another culture and country. The exchange with my Toi counterparts was strong at the outset and grew throughout the months of my visit. From the spontaneous conversations on pedagogy to our time in rehearsals, my colleagues and I nurtured a bond that will lead to future collaborations.”



## FULBRIGHT SPECIALIST AWARDS

Fulbright Specialist Awards are for New Zealand institutions to host US academics, artists or professionals for lectures, seminars, workshops, conferences or symposiums. Six awards were granted this year, towards programmes of activities two to six weeks in length.

The Fulbright Specialist programme pairs highly qualified US academics and professionals with host institutions abroad to share their expertise and strengthen institutional linkages, while building capacity at their overseas host institutions.

Specialists, who represent a wide range of disciplines, are competitively selected to join the Fulbright Specialist Roster. Those who have been approved to join the Roster are then eligible to be matched with approved projects designed by foreign host institutions from over 150 countries. Once abroad, Specialists partner with their host institution to conduct project activities in support of the host institution's priorities and goals.

The Fulbright Specialist programme aims to provide a short-term, on-demand resource to international host institutions. Specialists are strongly encouraged to continue to work with host institutions in the years following their initial exchange.



*Pictured: Fulbright 2014 Specialist Jody McBrien, presenting at the Fulbright New Zealand office in 2019.*

### 2019 SPECIALISTS TO NEW ZEALAND

#### Christopher Bellitto

The University of Canterbury hosted Christopher Bellitto from New Jersey to lecture, workshop and develop capability in the practice of humanities. Chris is a Professor of History at Kean University in New Jersey.

#### Carrie Earthman

The University of Auckland hosted Carrie Earthman from Minnesota to provide expert clinical nutrition training and professional education for practicing dietitians. Carrie is Adjunct Professor in the Department of Food Science and Nutrition at the University of Minnesota.

#### Robert Field

Auckland University of Technology hosted Robert Field from Philadelphia to assist in developing a postgraduate major in non-communicable disease. Robert is Professor of Law and of Health Management and Policy at Drexel University.

#### Dianne Finch

Auckland University of Technology's Journalism Department hosted Dianne Finch from Massachusetts to focus on upskilling students and academics on the use of data and storytelling with data. Dianne is a Data Visualisation Specialist with affiliations to Boston University, Elon University, Kent State University and Salem State University.

#### Donna Riley

The University of Waikato hosted Donna Riley from Indiana as keynote speaker on Diversity in Engineering at the Australasian Association for Engineering Education Conference, December 2018. Donna is Kamyar Haghighi Head of the School of Engineering Education at Purdue University.

#### David Sedlak

The University of Auckland hosted David Sedlak from California to present lectures, seminars and workshops on prospects for New Zealand's 'three waters' issue: drinking water, storm water and waste water. David is Plato Malozemoff Professor of Environmental Engineering at the University of California, Berkeley.



# OUR PARTNERS

Fulbright New Zealand’s core funding comes from the New Zealand Government, through the Ministry for Foreign Affairs and Trade, and from the United States Government, through the Department of State’s Bureau of Education and Cultural Affairs. This core funding supports Fulbright New Zealand’s General Graduate and Scholar Awards.

Fulbright New Zealand also has valuable partnerships with other organisations to offer more specialised Graduate and Scholar Awards. These partnerships are a great opportunity to target niche areas of research and expertise while benefiting from the prestigious Fulbright scholarship brand.

For Fulbright New Zealand, partnering with other agencies means we can connect directly into communities that align with the Fulbright mission and values, and increase the number of awards on offer to them.

*Pictured: Governor-General of New Zealand Patsy Reddy with NZ General Graduate Mitchell Chandler.*





OUR PARTNERS

MINISTRY OF BUSINESS,  
INNOVATION AND  
EMPLOYMENT



The Fulbright Science and Innovation Graduate Awards are for promising New Zealand graduate students to undertake postgraduate study or research at US institutions in fields related to science and innovation. Approximately ten awards are granted each year, towards one or two years of study or research in the US.

These awards are offered in partnership with the Science and Innovation group of the Ministry of Business, Innovation & Employment (MBIE), the lead agency driving the science and innovation sector in New Zealand. The partnership between MBIE and Fulbright New Zealand was established in 2005. Since then, over 170 awards have been granted.

The awards are available for science research of the highest quality in fields of science and innovation targeted to support New Zealand’s economic, social, environmental and cultural needs, and to build international science connections. This includes research with relevance to current and emerging New Zealand industry, social and environmental needs, research with potential to broaden the economy and increase connections between research and industries, sectors of future need or growth, and research supporting Vision Mātauranga – unlocking the science and innovation potential of Māori knowledge, resources and people.

“I think the Fulbright network will be forever useful to me and I am very grateful to now be a part of the Fulbright community.”

- Hazelle Tomlin

*Pictured Top:* NZ Science and Innovation Graduate Award grantee Ema Hao’uli at the WIPO Intergovernmental committee. *Middle:* NZ Science and Innovation Graduate Award grantee Mitchell Chandler scuba diving in California. *Bottom:* NZ Science and Innovation Graduate Award Grantees for 2019 (left to right) Injy Johnstone, Nandini Nair, Mitchell Chandler, Nicholas Goodson, Oliver Armstrong-Scott, Marise Stuart and Ema Hao’uli.



2019 FULBRIGHT SCIENCE AND INNOVATION  
GRADUATE AWARDS

|                        | FULBRIGHT HOST INSTITUTION  | ALMA MATER*   |
|------------------------|---|---|
| Oliver Armstrong-Scott | Yale University   | AUT, University of Otago  |
| Mitchell Chandler      | University of California San Diego, Scripps Institution of Oceanography | University of Auckland, University of Otago                               |
| Riwaj Dhakal           | University of California, Berkeley                                      | University of Canterbury**  |
| Nicholas Goodson       | Stanford University   | University of Canterbury  |
| Ema Hao'uli            | Cornell University  | University of Auckland  |
| Injy Johnstone         | University of Colorado  | Massey University, Victoria University of Wellington, University of Otago |
| Nandini Nair           | Carnegie Mellon University  | Massey University   |
| Marise Stuart          | Harvard Medical School  | University of Otago   |

\*Alma Mater refers to the university, school, or college that one formerly attended

\*\*currently pursuing degree

ALUMNI SPOTLIGHT:

HANAREIA  
EHAU-TAUMAUNU



Hanareia Ehou-Taumaunu is of Ngāti Uepōhatu, Ngāti Porou, Te Ātiawa, Te Whānau-a-Āpanui and Ngāpuhi descent. For her Fulbright award, she is completing a PhD specialising in plant pathology at Penn State University in State College, Pennsylvania. She graduated with a BSc/BA Conjoint in 2015, and an MSc (Hons) in 2017 from the University of Auckland.

Hanareia’s research interests in plant pathology and bio protection include taonga species and crops used by Māori growers. She is also heavily invested in mātauranga Māori within science and research, and in growing the number of Māori scientists.

For her PhD, Hanareia is using the model organism *Pseudomonas syringae* to understand microbe to microbe interactions in vitro and in planta. The aim for this fundamental work is to use bacteriocins, or the producers of the toxins, as biological control agents against economic plant pathogens. She is also incorporating Indigenous knowledge into her studies, investigating how microbiome transfers influence the suppression of plant pathogens in the ‘Three Sisters’ planting format, a key planting strategy for many indigenous bands (tribes) in the US.

In addition to her PhD work at Penn State University, Hanareia has attended and presented her research at numerous national and international conferences, including the American Society of Microbiology Microbe Conference, the International Congress of Plant Pathology Conference, the American Indian Science and Engineering Society (AISES), and the Society for Chicanos/Hispanics and Native Americans in Science (SACNAS).



## OUR PARTNERS

## NGĀ PAE O TE MĀRAMATANGA



In 2009 Fulbright New Zealand entered into partnership with Ngā Pae o te Māramatanga, the Māori Centre of Research Excellence. Ngā Pae o te Māramatanga has 21 partner research entities conducting research of relevance to Māori communities, and is an important vehicle by which New Zealand continues to be a key player in global indigenous research and affairs. The centre's research is underpinned by its vision of Māori leading New Zealand into the future and it is focused on realising the creative potential of Māori communities and bringing positive change and transformation to the nation, and the wider world.

Ngā Pae o te Māramatanga funds two awards through this partnership, one for New Zealand Graduate students and one for New Zealand Scholars. These awards support study or research that fits within and contributes to Ngā Pae o te Māramatanga's Research Programme, priorities and vision.

### Fulbright-Ngā Pae o te Māramatanga Graduate Award

This award is for a promising New Zealand graduate student to undertake postgraduate study or research at a US institution in the field of indigenous development. One award is granted annually towards one or two years of study or research in the US.

### Fulbright-Ngā Pae o te Māramatanga Scholar Award

This award is for a New Zealand academic, artist or professional to lecture and/or conduct research at a US institution in the field of indigenous development. One award was granted this year, towards three to five months of lecturing and/or research.



## 2019 FULBRIGHT-NGĀ PAE O TE MĀRAMATANGA GRADUATE AWARD

### FULBRIGHT HOST INSTITUTION

### ALMA MATER\*

Carrie Clifford

University of Colorado School of Public Health, John Hopkins Bloomberg School of Public Health

Victoria University of Wellington, University of Otago\*\*

## 2019 FULBRIGHT-NGĀ PAE O TE MĀRAMATANGA SCHOLAR AWARD

### FULBRIGHT HOST INSTITUTION

### HOME INSTITUTION

Jason Mika

Stanford University

Massey University

\*Alma Mater refers to the university, school, or college that one formerly attended

\*\*currently pursuing degree

### ALUMNI SPOTLIGHT:

## RENEE WIKAIRE

2012 Fulbright-Ngā Pae o Te Māramatanga awardee Renee Wikaire (Ngāpuhi, Ngāti Whātua) undertook her research at Florida State University. Her work focused on how Indigenous development can be achieved through sport and how this might affect positive social change in Indigenous populations.

For Renee, Florida State University represented the perfect opportunity to gain access to leading sports, health and sociology scholars.

"Collaboration with these leading scholars enabled me to gain insights into best practices and programs concerning health and sport which can be synthesized with Mātauranga Māori for the development of Māori health and wellbeing in Aotearoa."

One of the highlights of Renee's Fulbright experience was conducting research with the Suquamish Tribe of Washington State. Her findings galvanized her belief that, "we need to utilize Indigenous worldviews and epistemologies at the genesis of Sport For Development programs, rather than just trying to fit them into already established Western-models."

Renee's Fulbright award offered many rewarding experiences. "Personally, I found my stay in the U.S really invigorating and eye opening. I was able to meet and interact with a variety of different people from an array of cultures and backgrounds. This has been a priceless form of life experience and I have made friends that I will treasure for life."

*Pictured Top:* Fulbright NZ Ngā Pae o te Māramatanga alumni Te Puoho Katene. *Middle:* Fulbright Ngā Pae o te Māramatanga alumnae Maia Wikaira and Sharon Toi listen to a presenter at FBNZ Lightning talks. *Bottom:* Fulbright NZ Ngā Pae o te Māramatanga Award grantee Carrie Clifford.



## OUR PARTNERS

## EARTHQUAKE COMMISSION



The Earthquake Commission (EQC) is a New Zealand Crown entity investing in natural disaster research, education and providing insurance to residential property owners. The partnership with Fulbright New Zealand and the graduate award was established in 2003. Since then, a total of 10 exceptional grantees have been confirmed over a period of 12 years.

One of EQC's functions is to facilitate research and education about matters relevant to natural disaster damage and methods of reducing or preventing natural disaster damage. The Fulbright-EQC Award in Natural Disaster Research was developed in line with this function and is an example of EQC's commitment to the development of natural disaster research in New Zealand.

The Fulbright-EQC Graduate Award in Natural Disaster Research is for a promising New Zealand graduate student to undertake postgraduate study or research at a US university in the area of natural disaster research. One award is granted each year, towards one year of study or research in the US. The award sits within the NZ Graduate Awards category – one of four graduate-level awards currently run on an annual basis for New Zealanders.

Alumni have reported the award has had a hugely positive effect on their academic and professional careers, as well as their personal development. The majority of grantees have continued to work in earthquake and disaster recovery-related fields and report a clear alignment between their trajectory and the mission and goals of EQC.



### GRANTEE SPOTLIGHT:

## DANIELLE LINDSAY

Dropping out of a helicopter to research the impact of the Kaikōura earthquake is just one of many career adventures for geophysics graduate Danielle Lindsay.

As the 2019 recipient of the Fulbright-EQC Graduate Award in Natural Disaster Research, Danielle will undertake a PhD in Geophysics at the University of California, Berkeley, focussing on earthquakes, slow slip events and how they interact.

Danielle says that during her graduate studies, it has been sobering to realise how vulnerable people can be to devastating natural disasters. "I have realised how important understanding the fundamental geological forces driving these events is, and how this knowledge helps society better prepare for and mitigate the effects of natural disasters."

"Some of the big questions facing New Zealand at the moment relate to the interactions of locked and slipping patches of the Hikurangi Subduction Zone, and how ruptures could propagate between them and their potential magnitudes," says Danielle.

"I want the research I complete to have a real impact on the society I live in."

## 2018 FULBRIGHT-EQC GRADUATE AWARD IN NATURAL DISASTER RESEARCH

### FULBRIGHT HOST INSTITUTION

### ALMA MATER\*

**Danielle Lindsay** University of California, Berkeley

*Victoria University of Wellington*

\*Alma Mater refers to the university, school, or college that one formerly attended

*Pictured: EQC Graduate Award grantee Danielle Lindsay; Top: with Honorary chairpersons US Ambassador to New Zealand Scott P. Brown and Minister of Foreign Affairs, New Zealand Rt. Hon Winston Peters. Centre and Bottom: EQC Graduate Award grantee Danielle Lindsay engaging in field work.*





The Fulbright Distinguished Awards in Teaching are generously funded by the New Zealand Ministry of Education, in partnership with Fulbright New Zealand. The partnership was formed in 2013. There are two awards in this category: one for New Zealand teachers, and one for teachers from the US. The awards reflect the Ministry’s commitment to raising the status of the teaching profession through research and development, and in doing so, raising student achievement through educational and cultural exchange.

**Fulbright Distinguished Awards in Teaching Programme for New Zealand Teachers**

This award provides for two New Zealand primary or secondary school teachers to join international educators from all over the world in a four month professional development programme at one of three host US universities. The programme includes academic coursework, leadership training, instructional technology seminars, and opportunities to observe, co-teach, and share their expertise in US elementary and secondary schools. Each participant also completes an individual or group project relevant to their teaching.

**Fulbright Distinguished Awards in Teaching Programme for US Teachers**

The US awards provide for up to 10 highly accomplished American teachers to participate in an intensive professional development programme in New Zealand. Grantees study at Victoria University of Wellington and conduct an inquiry project related to their professional interests. Additional activities in local schools include opportunities to observe classes, team teach or conduct seminars or workshops. Grantees will also participate in a web-based collaborative project with other participants to share best practices and other elements of host country educational systems.

Upon returning to their home countries, both US and New Zealand grantees are expected to share the knowledge and experience gained on the programme with teachers and students in their home schools and within their communities.



**GRANTEE SPOTLIGHT:**

**DIANNE CHRISTENSON**



Dianne Christenson, lead teacher for science at Koranui Primary School in Stokes Valley, was selected for the Fulbright Distinguished Award in Teaching Programme and spent five months at Syracuse University in the US in 2019.

Dianne’s research focus was to explore cross-curricular project-based learning for literacy acquisition in multi-cultural classrooms. The experience, which Dianne describes as ‘unbelievable’, introduced her to new concepts in teaching science and writing, including a model called Ambitious Science. This model emphasizes project-based learning that incorporates writing about science without losing children’s engagement.

‘I visited three schools where their complete learning was based on locally based projects. It was so different from what many schools do in New Zealand,’ she says.

Since returning to New Zealand, Dianne has been implementing methods of Ambitious Science teaching in her own class. She has also been sharing her knowledge in workshops organised by the Royal Society for its Science Teaching Leadership Programme.

Of her Fulbright award, Dianne says, ‘the award has given me the skills to continue to develop my personal skills in offering professional development to other teachers. Fulbright gave me belief in myself and the confidence to accept these opportunities and challenges.’

**2019 FULBRIGHT DISTINGUISHED AWARDS IN TEACHING PROGRAMME FOR NZ TEACHERS**

|                    | FULBRIGHT HOST INSTITUTION | HOME INSTITUTION    |
|--------------------|----------------------------|---------------------|
| Dianne Christenson | Syracuse University        | Koranui School      |
| Eva Cornforth      | Arizona State University   | Otahuhu College     |
| Sera Henare        | Arizona State University   | Te Kauwhata College |

**2019 FULBRIGHT DISTINGUISHED AWARDS IN TEACHING PROGRAMME FOR US TEACHERS**

|                  | FULBRIGHT HOST INSTITUTION        | HOME INSTITUTION   |
|------------------|-----------------------------------|--|
| Stephanie Graham | Victoria University of Wellington | Mount Everett Regional School                                    |
| Brynn Johnson    | Victoria University of Wellington | Academy of the Sacred Heart                                      |
| Servena Narine   | Victoria University of Wellington | P.S. 307 Dr. Daniel Hale Williams Magnet School for STEM Studies |

*Pictured Top: Dianne Christianson with students. Middle: Koranui Primary School students. Bottom: Sera Henare and Eva Cornforth (left to right)*



## OUR PARTNERS

## CREATIVE NEW ZEALAND WALLACE ARTS TRUST



ARTS COUNCIL OF NEW ZEALAND TOI AOTEAROA

The Fulbright-Creative New Zealand Pacific Writer's Residency award is offered in partnership with Creative New Zealand – the national arts development agency developing, investing in and advocating for the arts. This partnership was established in 2004 and aims to develop and foster closer links between the New Zealand Pacific communities and the peoples of Hawai'i, while also increasing the profile and awareness of literature as an art form within the Pacific communities of New Zealand.

The award is for a mid-career or senior New Zealand writer of Pacific heritage to carry out work on a creative writing project exploring Pacific identity, culture or history at the University of Hawai'i for three months. Hawai'i has been identified as a strategic location for artists and is considered the hub of Pacific writing with numerous universities, library resources, networks, writers' forums and publishers. It is also an important link to the mainland US and has a strong indigenous culture. One award is granted each year.

Previous grantees have included authors Sarona Aiono-Iosefa, Marisa Maepu and David Eggleton, poets Tusiata Avia and Daren Kamali, filmmakers Sima Urale and Toa Fraser, and playwright Victor Rodger.



The Fulbright-Wallace Arts Trust Award is offered in partnership with the Wallace Arts Trust as part of the annual Wallace Art Awards, the longest surviving and largest annual art awards of their kind in New Zealand which aims to support, promote and expose New Zealand contemporary art and artists. This partnership was established in 2008 to develop and extend links between New Zealand and American artists.

The Fulbright-Wallace Arts Trust Award is for an outstanding mid-career or senior New Zealand visual artist to undertake a ten week residency at Headlands Center for the Arts in Sausalito, California. One award is granted each year, towards a ten week artist residency.

## 2019 FULBRIGHT-CREATIVE NEW ZEALAND PACIFIC WRITER'S RESIDENCY

### FULBRIGHT HOST INSTITUTION

Oscar Kightley University of Hawai'i, Moana

## 2019 FULBRIGHT-WALLACE ARTS TRUST AWARD

### FULBRIGHT HOST INSTITUTION IN THE US

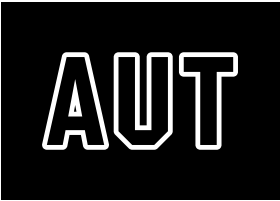
Emma Fitts Headlands Center for the Arts in Sausalito

### HOME INSTITUTION

University of Canterbury



# EXTERNAL AWARDS



Fulbright New Zealand is delighted to announce support from Auckland University of Technology. From 2020 AUT will offer scholarships that encourage and facilitate study in approved postgraduate degrees at AUT by candidates selected to hold Fulbright Awards. These scholarships are intended to enable Fulbright Award winners to complete their degree at AUT.



The University of Otago offers Fulbright US graduate students a two-month living stipend to support the completion of their thesis. The Fulbright US Graduate Award covers the tuition fees and living stipend of the first ten months of a 12-month thesis, and the University of Otago supplements this with the extra two-month stipend. Rowena Schenck from Massachusetts was the recipient in 2019. She will complete a Master of Science in Marine Science at the University of Otago.



The Victoria Fulbright Masters by Thesis Scholarship is one scholarship per year for a Fulbright US Graduate Award recipient about to commence the second year of a full-time, research-focused Master's degree. No award was given in 2019.

AUCKLAND UNIVERSITY OF TECHNOLOGY  
UNIVERSITY OF OTAGO  
VICTORIA UNIVERSITY OF WELLINGTON  
THE UNIVERSITY OF AUCKLAND  
THE LOIS ROTH ENDOWMENT



*Pictured Top Left: Ngā Pae o te Māramatanga grantee Carrie Clifford. Top Right: US Graduate Award grantee Rory Taylor and Fulbright alumni Zilbiins Johnson. Bottom: US Graduate Award grantees Hannah Dougherty, Rowena Schenck and Molly Knoedler.*



The University of Auckland Fulbright Scholarships are intended to encourage and facilitate study for approved post-graduate degrees at the University of Auckland by candidates already selected to hold Fulbright Awards. These scholarships are intended to enable Fulbright Award grantees to complete Masters or Doctoral degrees at the University of Auckland.

Molly Riley Knoedler and Rory Taylor are the 2019 recipients of the University of Auckland's Fulbright Scholarship, enabling them to complete the second year of their Master's Degrees. Molly will complete a Master of Science in Applied Mathematics, and Rory will complete a Postgraduate Diploma in Maori Studies.



## THE LOIS ROTH ENDOWMENT

The Lois Roth Endowment sponsors the Robin W. and Avril Flockton Winks Award in honour of one of its founding trustees and a Fulbright alumnus to New Zealand, Robin W. Winks, and his New Zealand wife Avril Flockton Winks.

The award provides a current Fulbright New Zealand graduate student in the field of humanities and/or social sciences assistance towards research costs and book purchases, preferably in comparative studies between New Zealand and the US. One award valued at US\$1,750 is granted each year

The 2019 award went to Carrie Clifford who will be conducting comparative research on indigenous conceptualisations of child development, mental health, and treatment at the University of Colorado in Denver, Colorado and John Hopkins University in Baltimore, Maryland, towards her PhD at the University of Otago.





The New Zealand Harkness Fellowships were established in 2009 by the New Zealand Harkness Fellowships Trust Board to reinforce links between New Zealand and the US and to enable emerging leaders in the public sector to benefit from study and travel in the US. These Fellowships are for emerging New Zealand leaders in any field of study or vocation (excluding health care policy and practice) to study or research in the US for between eight and twelve weeks. The fellowship is currently offered annually to those employed in a public sector organization in New Zealand.

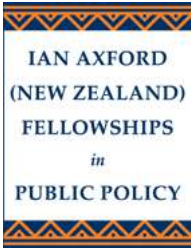
The purpose of the Fellowship is to enable appointed Fellows to gain first-hand knowledge and build contacts in their chosen field of endeavour that will be highly relevant to the NZ context and future NZ/US links. The programme has four goals:

- Reinforce New Zealand-United States links by enabling actual or potential leaders and opinion formers in New Zealand to benefit from new ideas, practices and new contacts in the US;
- Increase the Fellow’s ability to bring about change and improvements in New Zealand;
- Help improve the cross-fertilisation of ideas and experience between New Zealand and the United States; and
- Build a leadership network on both sides of the Pacific, encourage ongoing exchange between New Zealand and the United States and establish enduring relationships offering reciprocal benefits to both countries.

Fulbright New Zealand manages these Fellowships on behalf of the Harkness Fellowships Trust (NZ).



*Pictured Top Left: Axford Fellows Alexa Daniels-Shpall and Laura Berntsen in Bay of Islands, New Zealand. Bottom Left: Axford Fellows (left to right) Laura Berntsen, Alexa Daniels-Shpall, Paul Phifer, and Nathan Swinton. Above: Harkness Fellow Douglas Jones*



Established in 1995 by the New Zealand Government to reinforce links between New Zealand and the US, the Ian Axford (New Zealand) Fellowships in Public Policy provide the opportunity for outstanding mid-career American professionals to gain first-hand knowledge of public policy in New Zealand. Research areas include economic, social and political reforms and management of the government sector.

The programme has three goals:

- To reinforce New Zealand-United States links by enabling Americans of high intellectual ability and leadership potential to come to New Zealand to gain experience and build contacts in the field of public policy development;
- To help improve the practice of public policy in New Zealand and the United States by the cross-fertilization of ideas and experience in the two countries; and
- To build a network of public policy experts on both sides of the Pacific, and encourage ongoing policy exchange between New Zealand and the United States.

2019 IAN AXFORD (NEW ZEALAND) FELLOWSHIPS IN PUBLIC POLICY

| GOVERNMENT HOST INSTITUTION | HOME INSTITUTION   |
|-----------------------------|--|
| Laura Berntsen              | Ministry of Social Development and Ministry of Business, Innovation and Employment |
| Alexa Daniels-Shpall        | New Zealand Police and the Independent Policy Conduct Authority                    |
| Paul Phifer                 | Department of Conservation   |
| Nathan Swinton              | New Zealand Police and Ministry of Justice   |

2019 NEW ZEALAND HARKNESS FELLOWSHIP

| GOVERNMENT HOST INSTITUTION | HOME INSTITUTION                            |
|-----------------------------|---|
| Douglas Jones               | Massachusetts Institute of Technology       |
| Donna Provoost              | University of Oregon and Harvard University |





# Independent Auditor's Report

To the Trustees of New Zealand United States Educational Foundation

## Report on the summary consolidated financial statements

### Opinion

In our opinion, the accompanying summary consolidated financial statements of New Zealand United States Educational Foundation (the trust) and its subsidiaries (the group) on pages 38 to 41:

- Have been correctly derived from the audited group financial statements for the year ended on that date; and
- Are a fair summary of the group financial statements, in accordance with PBE FRS 43 Summary Financial Statements.

The accompanying summary consolidated financial statements comprises:

- the summary consolidated statement of financial position as at 30 September 2019;
- the summary consolidated statements of comprehensive revenue and expense, changes in equity and cash flows for the year then ended; and
- notes, including a summary of significant accounting policies and other explanatory information.



### Basis for opinion

We conducted our audit in accordance with International Standard on Auditing (New Zealand) (ISA (NZ)) 810 (Revised), *Engagements to Report on Summary Financial Statements*.

Other than in our capacity as auditor we have no relationship with, or interests in, the group.



### Use of this Independent Auditor's Report

This report is made solely to the Trustees as a body. Our audit work has been undertaken so that we might state to the Trustees those matters we are required to state to them in the Independent Auditor's Report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Trustees as a body for our audit work, this report, or any of the opinions we have formed.



### Responsibilities of the Trustees for the summary Consolidated Financial Statements

The Trustees, on behalf of the trust, are responsible for:

- the preparation and fair presentation of the summary consolidated financial statements in accordance with PBE FRS 43 Summary Financial Statements; and
- implementing necessary internal control to enable the preparation of a summary group set of financial statements that are correctly derived from the audited group financial statements.



### Auditor's Responsibilities for the summary Consolidated Financial Statements

Our responsibility is to express an opinion on whether the summary consolidated financial statements are consistent, in all material respects, with (or are a fair summary of) the audited group financial statements based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) (ISA (NZ)) 810 (Revised), *Engagements to Report on Summary Financial Statements*.

We expressed an unmodified audit opinion on the group financial statements in our audit report dated 4 December 2019.

The summary consolidated financial statements do not contain all the disclosures required for a full set of group financial statements under generally accepted accounting practice in New Zealand. Reading the summary consolidated financial statements, therefore, is not a substitute for reading the audited financial statements of the group.

KPMG  
Wellington

4 December 2019



## New Zealand United States Educational Foundation

### Consolidated Summary Statement of Comprehensive Revenue and Expense

For the year ended 30 September 2019

|   | Group               |                     |
|---|---------------------|---------------------|
|   | 2019                | 2018                |
| <b>REVENUE</b>                                      |                     |                     |
| United States Government grant                      | 858,994             | 1,420,537           |
| New Zealand Government grant                        | 1,172,126           | 1,063,430           |
| Other grants  | 1,162,694           | 786,185             |
| Donations   | 11,504              | 5,857               |
| <b>Total Revenue from non-exchange transactions</b> | <b>3,205,318</b>    | <b>3,276,009</b>    |
| Interest  | 144,113             | 87,863              |
| Rendering of services                               | 60,000              | 60,000              |
| Other operating income                              | -                   | 14,566              |
| <b>Total Revenue from exchange transactions</b>     | <b>204,113</b>      | <b>162,429</b>      |
| <b>TOTAL REVENUE</b>                                | <b>\$ 3,409,431</b> | <b>\$ 3,438,438</b> |
| <b>EXPENSES</b>                                     |                     |                     |
| Grants  | 2,406,084           | 1,251,534           |
| Employee related costs                              | 618,809             | 635,384             |
| US dollar translation differences                   | - 71,487            | - 43,578            |
| Other expenses                                      | 348,054             | 287,065             |
| <b>TOTAL EXPENSES</b>                               | <b>\$ 3,301,460</b> | <b>\$ 2,130,405</b> |
| <b>Surplus (Deficit)</b>                            | <b>\$ 107,971</b>   | <b>\$ 1,308,033</b> |

### Consolidated Summary Statement of Changes in Equity

For the year ended 30 September 2019

|                                       | Accumulated<br>revenue and<br>expenses | Special<br>Purpose<br>Reserves | Total Equity        |
|---------------------------------------|--|--------------------------------|---------------------|
| <b>Balance 1 October 2017</b>         | 467,009                                | 1,979,934                      | 2,446,943           |
| Share of Surplus/Deficit for the year | 709,467                                | 598,566                        | 1,308,033           |
| Transfers                             | -                                      | -                              | -                   |
| <b>Balance 30 September 2018</b>      | <b>\$ 1,176,476</b>                    | <b>\$ 2,578,500</b>            | <b>\$ 3,754,976</b> |
| Share of Surplus/Deficit for the year | 285,897                                | 177,926                        | 107,971             |
| Transfers                             | -                                      | -                              | -                   |
| <b>Balance 30 September 2019</b>      | <b>\$ 1,462,373</b>                    | <b>\$ 2,400,574</b>            | <b>\$ 3,862,947</b> |

## Consolidated Summary Statement of Financial Position

As at 30 September 2019

|                                     | Note | Group<br>30 September<br>2019 | Group<br>30 September<br>2018 |
|-------------------------------------|------|-------------------------------|-------------------------------|
| <b>ASSETS</b>                       |      |                               |                               |
| Current Assets                      |      | 5,182,285                     | 4,914,116                     |
| Non Current Assets                  |      | 373,267                       | 15,306                        |
| <b>TOTAL ASSETS</b>                 |      | <b>\$ 5,555,552</b>           | <b>\$ 4,929,422</b>           |
| <b>LIABILITIES</b>                  |      |                               |                               |
| Current Liabilities                 |      | 1,692,605                     | 1,174,446                     |
| Non Current Liabilities             |      | -                             | -                             |
| <b>TOTAL LIABILITIES</b>            |      | <b>\$ 1,692,605</b>           | <b>\$ 1,174,446</b>           |
| Special purpose reserves            | 1    | 2,400,574                     | 2,578,500                     |
| Accumulated revenue and expense     |      | 1,462,373                     | 1,176,476                     |
| <b>TOTAL EQUITY</b>                 |      | <b>\$ 3,862,947</b>           | <b>\$ 3,754,976</b>           |
| <b>TOTAL EQUITY AND LIABILITIES</b> |      | <b>\$ 5,555,552</b>           | <b>\$ 4,929,422</b>           |

### Consolidated Summary Statement of Cash flows

For the year ended 30 September 2019

|   | Note | Group<br>2019  | Group<br>2018    |
|---|------|----------------|------------------|
| Net cash flows from operating activities  |      | \$ 1,229,215   | \$ 822,387       |
| Net cash flows from investing activities  |      | -\$ 1,618,598  | -\$ 899,123      |
| Net increase / (decrease) in cash on hand |      | - 389,383      | - 76,736         |
| Add Opening Cash Balance                  |      | 1,085,953      | 1,162,688        |
| <b>Closing Cash on hand</b>               |      | <b>696,570</b> | <b>1,085,953</b> |



## Notes to the Summary Financial Statements

### 1 Special purpose reserves

| Special purpose reserve John F Kennedy Memorial | Group   |         |
|---|---------|---------|
|   | 2019    | 2018    |
| John F Kennedy Capital                          | 50,000  | 50,000  |
| John F Kennedy Special purpose reserve          | 207,504 | 200,837 |
| John F Kennedy Equity                           | 257,504 | 250,837 |

The deed appointing the NZUSEF as the trustee of the John F Kennedy Fund requires that \$50,000, constituting the capital of Kennedy Memorial Fund, shall not be applied towards the costs of a visit of a Kennedy Fellow. The special purpose reserve is for the purpose of bringing eminent Americans to New Zealand for speaking and teaching engagements in honour of the late President John Fitzgerald Kennedy.

| Special purpose reserve Fulbright Trust          | Group     |           |
|--|-----------|-----------|
|  | 2019      | 2018      |
| Fulbright Trust general: capital                 | 100,000   | 100,000   |
| Fulbright Trust Special endowment: capital       | 843,473   | 831,969   |
| Fulbright Trust Special endowment: distributable | 257,263   | 218,760   |
| Fulbright Trust Special equity                   | 1,200,736 | 1,150,729 |

The general capital fund consists of the minimum capital balance of \$100,000.  
The general fund distributable consists of donations tagged for a specific purpose.  
The endowment capital fund consists of transfers of surpluses from NZUSEF and untagged  
The endowment distributable balance consists of an accumulation of surplus interest after overheads from within the Fulbright Trust.

| Special purpose reserve NZUSEF | Group   |           |
|--------------------------------|---------|-----------|
|                                | 2019    | 2018      |
| NZUSEF Special purpose reserve | 942,334 | 1,176,934 |
| NZUSEF Special purpose reserve | 942,334 | 1,176,934 |

NZUSEF Special purpose reserve consists of funding received in advance of the expenditure being incurred. Under the PBE accounting standards this was treated as revenue in the year it was received as there was no right of return clause.

|                                       |                  |                  |
|---------------------------------------|------------------|------------------|
| <b>Total Special purpose reserves</b> | <b>2,400,574</b> | <b>2,578,500</b> |
|---------------------------------------|------------------|------------------|

## Statement of Accounting Policies

### A Reporting entity

The New Zealand - United States Educational Foundation (NZUSEF) is a bi-national organisation, established by a treaty between the government of the United States of America and the government of New Zealand for the financing of educational and cultural exchange programmes. The principal activity of the NZUSEF is to promote mutual understanding between the peoples of New Zealand and the United States of America through educational exchanges. The NZUSEF is based in New Zealand with its registered office located at 120 Featherston Street, Wellington.

Consolidated summary financial statements are presented. The consolidated summary financial statements comprise of the controlling entity and its controlled entities. The controlled entities are the Fulbright NZ Trust Incorporated and the John F Kennedy Memorial Fund.

The NZUSEF is reliant on the governments of New Zealand and the United States of America for a large part of its income. Either party may give the other written notice of its desire to terminate the agreement. Upon termination all funds and property of the Foundation becomes the property of both governments.

### B Basis of preparation

The summary financial statements have been extracted from the full audited financial statements for the year ended 30 September 2019 which were authorised for issue by the trustees on 4 December 2019. The summary financial statements have been prepared in accordance with PBE FRS-43 Summary Financial Statements. Information extracted from the full financial statements has not been restated or reclassified.

The full financial statements have been prepared in accordance with generally accepted accounting practice and complies with Tier 2 Not-For-Profit PBE IPSAS. The Group is a Public Benefit Entity.

The summary financial statements cannot be expected to provide as complete an understanding as is provided by the full financial statements of the financial performance, financial position and changes in equity of the Group. A copy of the full financial statements can be obtained, free of charge, from Fulbright New Zealand.

The auditor has examined the summary financial statements for consistency with the audited financial statements and has issued an unqualified opinion.

The summary financial statements are presented in New Zealand dollars.





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