



Emerging Practices in Philanthropy

Funder Stories



Philanthropy New Zealand
Tōpūtanga Tuku Aroha o Aotearoa

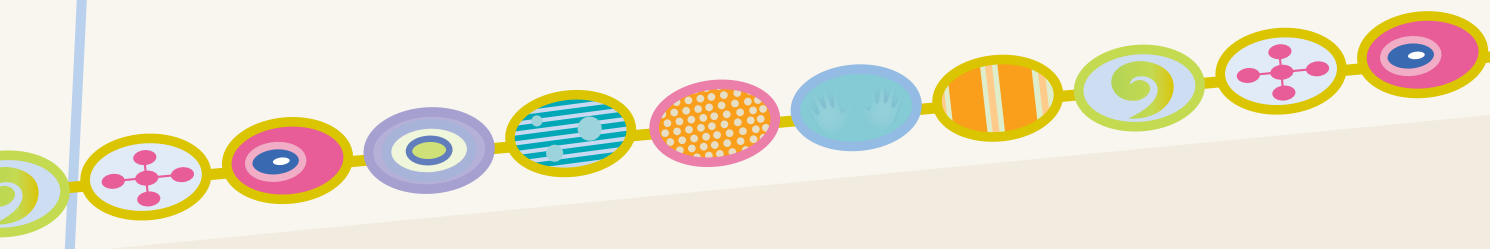
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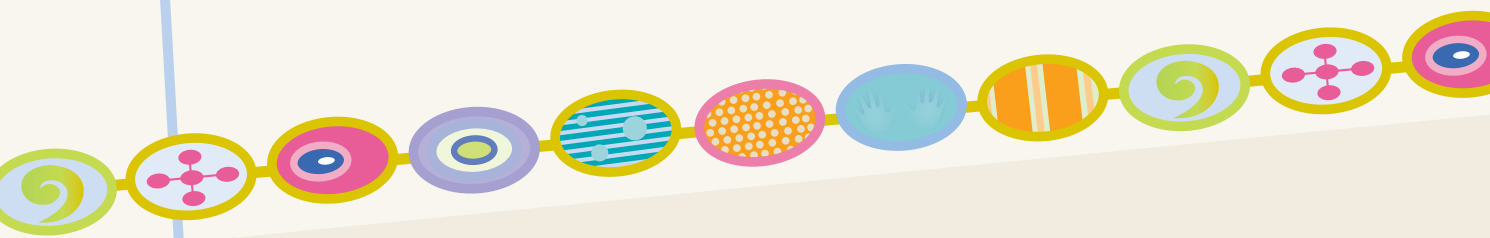


Philanthropy New Zealand would also like to acknowledge the contribution of the Learning and Development Network to this research.



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Welcome from the Chief Executive



The idea to publish these stories was sparked at our 2011 Philanthropy New Zealand conference, after a session on capacity building invoked avid discussion on new and evolving practices emerging from some organisations in their approach to grantmaking.

That debate flowed on within the Learning and Development Network, a group of passionate grantmakers who meet regularly to share lessons learned and develop evaluation.

How are grantmakers in New Zealand responding to challenges in the community today? We asked eight significant funders about their practices, what they found effective and what they found challenging – in other words, created a record of the conversations and practices already occurring in the sector.

A key question woven through the stories is: “What supports genuine, positive change?” We are all seekers in terms of this question, and the hope is that these funder stories will give you some ideas and support you in your quest to make a difference.

New Zealand’s philanthropic sector is relatively new – just 25 to 30 years old – and still evolving. Our belief at Philanthropy New Zealand is that telling our stories and sharing our lessons is very important for our practices to grow and develop.

Maybe people will recognise some of these practices in what they are doing already – or they might see new possibilities.

What is important to note, is this is not a ‘how to’ of best practice, nor is it suggested that everyone should try these methods – the aim is to draw out emerging and interesting practices we can all learn from.

What these stories highlight is that philanthropic organisations have so much more to offer than funding – they can facilitate and lead, commission research, bring people together, build the capacity of our community and voluntary sector and invest in long-lasting, transformative change.

Our huge thanks to all those who participated so openly and honestly – it is only through this generosity that we can learn and develop together.

I believe there is a need for more sharing of stories, hence this report is the first of a series of work – enjoy!

Robyn Scott

Chief Executive Philanthropy New Zealand

Changes in funding practices



I was delighted to be asked by Philanthropy New Zealand to think about the background to this important and timely publication. Philanthropic practice has undergone some significant changes in New Zealand over the past 20 years and it is important that we document and share the lessons that have been learned.

One of the biggest changes that I have observed in New Zealand is seeing funders develop a clear vision of what they want to achieve through their funding rather than, as in the past, having their funding decisions essentially driven by the applications they received.

The challenge we face as a philanthropic sector is to fund the most effective responses to the issues we deal with, both in our communities and as a society. This is as much a challenge for our partners in the grant-seeking community as it is to us as funders.

Recently grantmakers around the world have been discussing and working on the development of best practice, and increasingly focusing on evidence of effectiveness in areas that are notoriously difficult to measure. New Zealand can learn a lot from the United States and Europe. However, we in the grantmaking sector in New Zealand must talk and work in partnership with the non profit sector about the development of their measures of effectiveness, and on our own best practice, in order to create a culture of more effective giving.

For example, last year I was heartened to hear that Sir Peter Gluckman, Chief Science Advisor to the Prime Minister, was prepared to tackle some of the myths in the area of adolescent health. Sir Peter said in his May 2011 report: “Our research suggests that many programmes have been introduced, albeit with good intent, that are unlikely to succeed as they are not supported by the evidence-base, whereas other approaches likely to be effective have not been implemented.”

Increasingly in New Zealand and around the world we are seeing the emergence of place-based community development which is led by stakeholders in communities. As grantmakers it is important to understand that there are lessons to be learnt from communities and we must listen to and work with them.

Capacity building is another relatively new term for us in philanthropy. Frequently as funders we see that there are capacity issues within an organisation we want to fund. How many of us are prepared to say, ‘actually, you’re not ready for this money yet, but can we help you to get to a stage of readiness’?

In future, I hope to see all philanthropic trusts with clear strategic vision and intent, while accepting that grantmakers can’t be all things to all people. We will be funding fewer groups for longer; we will build in evaluation and research; we will work in partnership with the communities and we will listen to and learn from the results of what our grants have enabled communities to do.

It’s really important to remember that our grants are enabling people to do things within their communities – we’re not doers, we’re enablers – and we must incorporate what we can learn from community groups into our organisational learning and practice.

I hope this resource will be the first of many published by Philanthropy New Zealand to lead the way and encourage discussion, debate and even passionate and fierce argument in the sector on emerging funding practices.

Jennifer Gill

Chief Executive ASB Community Trust

Jennifer Gill worked with the late philanthropist Sir Roy McKenzie to found Philanthropy New Zealand in 1990 and the Funding Information Service in 1991. She has worked in the field of philanthropy for more than 25 years, during which time she has been executive officer of the Roy McKenzie Foundation, trustee and chair of the JR McKenzie Trust and founding member and chair of the Wellington Regional Community Foundation. She has served on the board of the Asia Pacific Philanthropy Consortium and is a long-time board member and former chair of Philanthropy New Zealand.

Gathering funder stories

“Observers from inside and outside philanthropy are calling for a closer look at what philanthropy can do – what it must do – to help nonprofit organizations achieve meaningful results.” (Grantmakers for Effective Organizations (GEO)¹ 2010:4)

Grantmakers’ stories of interesting funding practices are the subject of this report. These funders provide examples of what GEO’s Jerry Sternin calls ‘positive deviants’ in the philanthropic sector in New Zealand – those who are trying new or creative ways to make a difference. The report sets out the approach taken and summarises key themes and insights from these funder stories, before presenting the stories themselves.

The funders here are not presenting their methods as best practice; in fact several funders noted that the approach they have taken is not for everyone. They simply provide ideas and seek to raise awareness of what is possible.

To gather these stories, face to face or phone interviews took place with representatives from eight funding organisations and one funder collaboration initiative between January and March 2012. See Appendix One for a list of the participants and initiatives involved.

While the focus is on funder perspectives, in the Trust Waikato case brief phone discussions were also held with iwi representatives and, in the TSB Community Trust example, a short group phone conference was held with the project control group for the Clifton Park Project.

All of those interviewed were sent a draft and final draft of their case study to review.

Insights for this research were also drawn from a Learning and Development Network session for philanthropic funders, held in Auckland in October 2011. In this session, eight funders shared what was new or interesting in their practice, including key drivers, what works, challenges, evaluation issues and advice for other funders.

The findings from this session echo many of the funder stories here, especially as some of the same funders were involved in both processes. Building on this research, the intent is to continue capturing stories of emerging and creative funding practices through various lenses, including those of funding recipients.

Rachael Trotman
Researcher

¹ Grantmakers for Effective Organizations, see www.geofunders.org



Overview

This section outlines key findings from the funding practices presented in this report, in terms of their aims, key characteristics, success factors, challenges and lessons to date.

Aims

These funders are united in their desire to make a greater difference. Some noted frustration with traditional funding methods that respond to what comes in, spread funding thinly and fund for short periods or in ways that do not build the capacity or sustainability of recipients. Some have signalled in their strategic plans a desire to explore different funding approaches (for example BayTrust and TSB).

Other catalysts for these new approaches include a pool of funding or surplus becoming available, responding to consultation or research-based needs, an application that raises questions and a desire to mitigate the effects of economic recession.

Common aims in these stories are to:

- make a significant, lasting difference, create system change, address root causes
- build capacity, leadership and skills
- safeguard the investment made through evaluation
- connect people and promote collaboration
- foster success by investing in building relationships, trust, passion, peer support and a safe environment for honest dialogue.

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Characteristics

The funding practices tend to involve varying combinations of the following characteristics.

Types of funding

- Multi-year grants, longer-term funding
- Significant funding
- Funding a few well
- Early stage funding
- Untagged, unrestricted funding
- Targeted funding rather than scatter gun
- Investing in skilled people (staff, consultants, researchers, evaluators, experts)
- Open to considering riskier projects

Relationships

- Developing a relationship between funder and recipient, often past the grant's life (a high-engagement approach)
- Building and operating on trust
- Working closely with recipients
- Being a good listener and responding to identified needs
- Culturally appropriate processes
- Shoulder tapping – inviting known or trusted groups to apply

Building capacity

- Funding professional development and training opportunities
- Funding capacity development partners (consultants) to work alongside recipients
- A multi-stage application process, with capacity building support at the second stage
- Trustees/board members mentoring or buddying recipients

Strengthening sectors

- Regular hui/events and training for recipients (past and present)
- Developing leadership, knowledge and skills in a sector
- Building relationships, networks and opportunities within and among sectors

Community, stakeholder or sector-led

- Supporting groups to realise their vision
- Seeking community identified/supported initiatives
- Leading or supporting a stakeholder or sector-based process

Learning and evaluation focus

- Building evaluation into grants/funding
- Supporting self-evaluation
- Funding meta-evaluation (combining many sources of data) across a fund or programme
- Seeking better information on short to long-term impact

Research-based, expert-led

- Funding research to identify needs and how to respond
- Funding expert panels and reference groups
- Needs-based approaches

Brokering and influencing

- Funders facilitating community and stakeholder processes
- Joint funder-recipient solutions
- Funders playing other roles (leading, networking, coordinating, influencing, etc.)

Success factors

The factors most perceived by funders to influence success include:

- Having skilled and experienced staff who can broker, facilitate, be strategic, persuade, influence and communicate well
- Inclusive and culturally appropriate processes that engage all stakeholders, especially those most affected
- An engaged governance body that trusts its staff
- Willingness to share power and roles
- Building sustainable, genuine relationships with recipients and stakeholders, which create an environment for trust, debate, challenge and progress
- Capacity and sector building
- A focus on learning, improvement and impact through evaluation.

Some funders have found that their reputation and profile have been enhanced by working in a high-engagement way, playing a facilitation role, or supporting capacity and sector building. Building relationships also makes connections that may pay dividends later and can help funders to gain in-depth knowledge of organisations, a sector or locality.

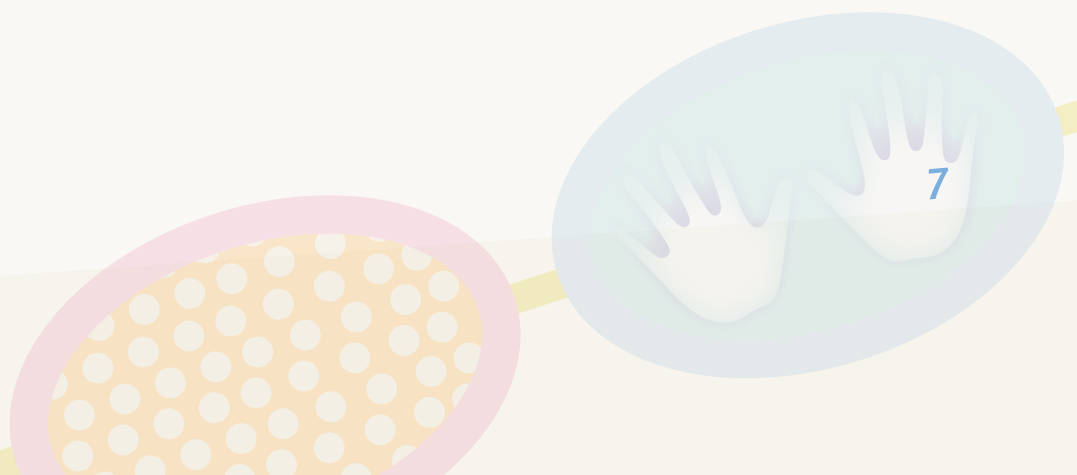
Challenges

The greatest reported challenges are around relationships and collaboration. These include the time and energy relationships require, pressures they can place on staff, dependence on key individuals and the impact if they leave. Some funders also identified that issues can arise if relationships falter, when funding stops and groups have to find alternative sustainable funding, or when an 'exit strategy' does not exist.

When strong relationships developed it was noted that: "The bad and the ugly surface more and trustees may not want to hear about failure or what is not working." However some consider that it is only through an environment of trust and debate that people can move beyond the usual 'funding game' where funders sit back while recipients paint an idealised picture of their work.

If fewer applicants are funded to a higher level, more requests must be turned down and it can be hard for staff and trustees to say no to groups: "There are lots of 'losers' when you concentrate funds." This approach can also require a large forward financial commitment. The application process for significant funding tends to be rigorous for groups and clear communication on the resources and effort needed to apply is important.

A further set of challenges were identified around evaluation, in terms of how to genuinely demonstrate success and impact and walk a line between relationship-building and seeking accountability. Groups generally need support to plan and evaluate well and getting people on board at all levels is not always easy.



Key messages

The key messages to funders from this research are as follows:

Key message	Description
<i>Play to your strengths</i>	<ul style="list-style-type: none">• Recognise and play to your strengths as a funder• Identify what funding practices fit with your values, vision, goals and capability• Use your power as a funder to lead, facilitate, bring people together, persuade and influence• Involve experts but trust your instincts• Engage trustees/board members and induct them well
<i>Have the courage to connect and trust</i>	<ul style="list-style-type: none">• Invest in staff with superb people and facilitation skills• Build relationships with recipients, stakeholders, sectors and communities• Commit to long-term relationships• See what happens if you let go of control and strive to act in true partnership• Be guided by those you fund and develop (culturally) appropriate processes
<i>Maximise your investment</i>	<ul style="list-style-type: none">• Be clear on who your approach is and isn't for• Take time to approve funding and have flexible time frames• Fund capacity development but make sure that consultants fit with the funded groups• Consider pre-and post-funding pathway support and develop an exit strategy• Support sector building• Fund creative research and processes that bring the right people together• Identify what other roles you can play to maximise funding impact• Consider how to sustain the work if key people leave
<i>Safeguard your investment</i>	<ul style="list-style-type: none">• Build evaluation into all processes and resource this properly• Seek to build planning and evaluation capacity in organisations – support them to tell their story better

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The funders in these stories have all explored what they can bring to the table other than funding to make a greater difference. Perhaps the key message from this research is that magic can happen when people with shared interests are skilfully brought together and supported to explore what is possible.

Funder stories

1. Supporting iwi-led development

Trust Waikato

*Chief Executive Bev Gatenby, Pouhere Putea/Donation Advisor
Rongo Kirkwood, with comment from Alice Anderson, Hauraki Māori Trust;
Janise Eketone, Maniapoto Māori Trust; Muna Wharawhara, Te Hauora o Ngati Haua.*

The practice

- Three year funding for marae-focused workers, employed and managed by iwi, to further iwi aspirations
- Ongoing, regular face to face contact with iwi and a relationship-based approach
- The aim is to strengthen marae and support iwi-led development.

Why and how?

In 2007 Trust Waikato consulted iwi on how it could best make an impact in the region, from their perspective. The same answer came back across iwi – we must have strong marae.

A driver for consultation was the Trust's desire to put Treaty of Waitangi principles into action. The Trust was also aware that some capital projects on marae were faltering, given difficulty accessing and retaining funding, as well as project management and capacity issues from volunteer to governance levels. After some discussion, three iwi trust boards each made a proposal for three year funding for a marae-focused worker.

Gems

This approach provides a marae-focused person for Trust Waikato staff to work alongside, so that a long-term relationship is built. The onus remains on iwi to meet their own aspirations.

Feedback from iwi is that this approach provides security and is empowering by being trust-based and hands-off. Trust Waikato is considered to be responsive: "Trust Waikato listens to the community; they focus their strategic priorities on real needs." The relationship with Trust Waikato has also increased their access to networks, advice, expertise and training.

Indicators of success to date include:

- A greater number of successful funding applications from marae to Trust Waikato and other funders
- More marae infrastructure built and increased marae-based capacity
- New buildings playing a role in revitalising and bringing people back to marae
- More networking between marae and external organisations such as the Fire Service, social services and the Historic Places Trust
- Increased marae-based programmes and services, hui and wananga.

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“Iwi are here forever in this community and we are here to support the community. Our focus is on a shared sense of wanting good for the community.”

Some marae have now shifted from focusing on capital works to projects – such as running programmes for children and rangatahi/young people. “This happens when marae are strong and says to me that this approach is working.” Funding a person to facilitate a range of sustainable outcomes is also seen as cost effective.

The Trust’s Pouhere Putea/Donations Advisor is in regular contact with iwi, and trustees and staff meet with iwi, hapu and fundees regularly: “We take trustees to the marae to meet the people and experience the iwi perspective of the region – it has been a great gift for iwi to host us”.

An education day is held once a year, which is specifically for trustees and staff to connect with iwi and to hear their stories: “Everyone goes on a bus together to a place like Turangawaewae or to visit historical sites. It’s key to relationship building – these bus trips have been really significant.” Having Trust Waikato’s kaumatua to lead the organisation on those trips and to clear the pathway has been crucial.

Challenges

Challenges of the approach include its dependence on finding the right person to employ, which is entirely left to iwi.

The hands-off approach may have been challenging for some iwi, who are used to a more tightly prescribed government contract model.

Trust Waikato need to walk a line between relationship building and accountability. However trusting relationships can also mean difficult issues are dealt with more effectively. One iwi representative commented: “There is a high level of trust. We can talk with [Trust Waikato] directly. We can raise tricky issues offline to address things.”

Continuing this approach in a context of trustee turnover requires continual trustee education.

Evaluation

The aim is to provide untagged funding with low-key reporting requirements, within a strong, trust-based relationship from which all parties can develop and learn. Trust Waikato provides funding to iwi to evaluate the roles and their partnership with Trust Waikato.

This project has highlighted a perceived lack of skilled evaluators for projects of this nature (especially those who can work well in iwi/Māori contexts); plus the potentially high cost of evaluation and people in communities having little experience of evaluation.



YKATO group performing in front of the Tupuna Whare at the Rukumoana Marae in Morrinsville – a funding recipient!

Lessons and advice to others

- Do not assume we know what is best
- Talk with iwi, listen and respond, be guided by iwi
- Ask: “What matters to you the most? What will make the most difference? What do you most want for your community?”
- Commit to a long-term relationship
- Do proper and ongoing groundwork with trustees
- Go out and meet the people and those you fund, and work with their aspirations
- Involve kaumatua, think about the Treaty, learn about tikanga and kawa in your region, get to know iwi and hapu (for example Trust Waikato has an annual Treaty training day for staff and trustees, plus regular contact with iwi).

Further key messages are to focus on what you have in common and acknowledge the mutual benefits of this kind of approach: “Iwi are here forever in this community and we are here to support the community. Our focus is on a shared sense of wanting good for the community.”

What next?

Maniapoto have now moved from being a strategic partner with Trust Waikato to receiving a multi-year funding agreement. This may also happen with Hauraki and Ngati Haua, and Raukawa is likely to walk a similar path with Trust Waikato. Trust Waikato can foresee situations where it will work alongside iwi as collegial funders, as iwi become significant funders in their own right. This may need a shift in mindsets: “Most people don’t want genuine partnership with a funder; they want funding, not co-creating or joint managing.”

The following is a prophetic saying of Kiingi Taawhiao which speaks of determination, survival of a people and traditional cultural practices and values².

*Maaku anoo e hanga tookuu nei whare
Ko ngaa pou he mahoe, he patate
Ko te taahuuhuu he hiinau
Me whakatupu ki te hua o te rengarenga
Me whakapakari ki te hua o te kawariki
‘I shall fashion my own house
The support posts will be of mahoe and patate
The ridgepole of hinau
Those who inhabit the house will be raised on rengarenga
and nurtured on kawariki’*

² Note that this korero is presented in the Waikato/Tainui dialect, hence the double up of vowels.

2. Building a youth sector whānau

The Vodafone NZ Foundation

Foundation Manager Annette Culpan and Senior Advisor Sum Tran

The practice

- Regular hui and events for funding recipients
- Board members individually buddying funding recipients
- Building evaluation into every aspect of the Foundation's work
- The aims are to build a family of like-minded people in the youth sector, create and share good practice, promote collaboration and grow leadership.

Why and how?

The Vodafone NZ Foundation funds leaders in the youth charity sector through its World of Difference fund and a fellowship in Youth Health Leadership. In 2003, the Foundation's current manager was a World of Difference grant recipient, who realised that grantees were isolated from each other. When the manager's role came up in 2007, she took the opportunity to build a community of youth sector leaders.

The first World of Difference hui occurred in 2007 and there are now regular hui, events and social occasions. Speakers and trainers are brought in and participants run sessions themselves. "We have created a whānau in the youth health and development sector. It is a close network with magical connections among the group."

World of Difference recipients are also matched with a buddy from the Vodafone Foundation board for the year. Both negotiate how to best work their buddy system, including how often to meet.

Gems

The hui process is considered to foster high trust and good relationships: "People are much more successful when they are surrounded by positive relationships."

The hui aim to create a safe environment, where people are encouraged to try new things and share both their challenges and achievements.

Recipients and charity partners have built on these connections outside of these hui and often support each other in their work: "Creating opportunities for like-minded individuals in the youth sector to network has resulted in collaboration as well as peer support outside of Foundation-hosted events."

The buddy system provides further support for World of Difference recipients and helps to engage board members in the work they fund.

"We have created a whānau in the youth health and development sector. It is a close network with magical connections among the group."

World of Difference hui 2011 – building youth health leadership



Investing in hui and mentoring is considered to multiply the positive impact of the funding, by strengthening skills, building community and creating authentic dialogue. This approach requires trust and clear lines of communication between the board and staff as well as caring, engaged board members whose values are strongly aligned to those of the Foundation.

Challenges

One challenge is the time needed to put into relationships. Vodafone staff members also need to be highly skilled in youth development, facilitation and working with people, as well as being able to bring people together to form a community, build relationships and mentor.

Evaluation

Evaluation is woven into all processes: “We evaluate everything. Our actions are informed by what our partners tell us is or isn’t working.” This occurs on a spectrum from monitoring and reporting, to monthly blogs from the World of Difference partners³, plus annual questionnaires, interviews with charity partners, film and photographic records of events and programmes, and a hui feedback process.

More sharing of stories is perceived to be needed within and among sectors. To support this, the Foundation has convened a national Youth Funders’ Network for those supporting youth charities to share and make the connections believed to be so vital to social change.

Lessons and advice to others

- Let things grow organically
- Let your partners define what they need every step of the way
- Let go of control and strive to act in true partnership
- Make attendance optional and do not penalise those who don’t engage: “When you let people go they come back again – be fluid.”
- Use film and social media methods as part of evaluation, and mix traditional with newer evaluation methods.

Further advice is to evaluate at every stage by building an evaluative lens and learning culture, and ask for feedback throughout your relationship.

“The end of year interviews with our partners are gold, we do these ourselves. It’s really helpful building evaluation into internal processes.”

World of Difference hui attendees listen to Principal Youth Court Judge, Andrew Barclay



³ See <http://foundation.vodafone.co.nz/foundation-blog/>

3. Turning the curve in educational achievement

ASB Community Trust

Māori and Pacific Education Initiative, Project Manager Moi Becroft

The practice

- Significant funding of a few groups for up to five years
- Capacity partners and evaluators work with each group to build their capacity and support robust evaluation
- Around 10 percent of funding is for evaluation
- Funded groups are brought together quarterly to share lessons, receive training and provide peer support and feedback
- The aim is to lift Māori and Pacific educational achievement in Northland and Auckland.



Why and how?

The Māori and Pacific Education Initiative (MPEI) evolved from a strategic retreat for trustees in 2005. Faced with bleak statistics for Māori in Northland, Trust Chair Patrick Snedden suggested putting \$20m aside for Māori education. This suggestion coincided with a large surplus that year and in 2008 the decision was made to ring-fence funding, initially for Māori and later for Māori and Pacific educational achievement.

Expert Māori and Pacific reference groups, involving people from grass roots youth workers to academics, were set up to advise the Trust on how to allocate the funds. Both groups embarked on a year-long process within culturally appropriate frameworks, to hold deep conversations, debate and challenge, review available research and identify indicators of success and how best to make a difference.

Eventually expressions of interest were called for. Thirty seven shortlisted groups were each offered \$3000 to develop their proposal. Of the 10 groups who accepted this offer, seven were approved for funding after a long and intensive process.

Gems

This fund is described as a 'Rolls Royce' model, which is well resourced at every level. The reference group process was described as magical, involving mana to mana, gifted facilitation and paying close attention to tikanga and Pacific protocol. The process required skilled staff to lead and manage, an engaged board and a focus on building trusting relationships through debate, interaction and the sharing of food and intention.

Significant results are starting to emerge, with evidence of more whānau engagement in children's education and higher educational achievement occurring within some of the projects.

Common features of the funded projects are visionary leadership, a community-led response to a community identified issue, having clear community support and the potential to be replicated and scaled up (the latter was a criterion for funding).

"Developmental evaluation support reassures us that things are on track – we safeguard our investment by providing 10 percent for evaluation every time."

Challenges

Applicant organisations reportedly ‘go through the fire’ via the MPEI in terms of accountability and learning how to set up a rigorous programme from start to finish.

While every effort was made to be culturally responsive, the experience reportedly demonstrates that: “Our sector needs to up its game in terms of working with Pacific communities.”

Further key challenges include the pressures this high-engagement approach places on all concerned, including its time-intensive nature, people recognising the importance of robust evaluation and continuity if key people move on.

Evaluation

The evaluation approach is referred to as developmental, involving real-time evaluation of complex, ever-changing projects. “Developmental evaluation support reassures us that things are on track – we safeguard our investment by providing 10 percent for evaluation every time.”

Lessons and advice to others

- Invest in culturally appropriate, expert-led, inclusive processes to guide decision making on what to fund: “Get the front-end and the process right and you will get better outcomes”
- Protect your investment through capacity development and evaluation, and especially skilled and experienced capacity partners that ‘fit’ with the funded groups. Having a peer review process or expert overview for the evaluators safeguards their integrity
- Take time to approve final funding and have flexible timeframes
- Ensure that experienced staff manage relationships and processes – skills needed include conflict resolution, negotiation, people and facilitation skills
- Trust your intuition and gut feeling – use your radar to give people a chance
- Engage trustees at all stages and build in processes to induct new trustees. Locking these funds aside for the MPEI was also described as a visionary decision
- A line is walked between testing the groups applying and requiring accountability, while not dampening their creativity and passion: “How do you get assurance in terms of people’s capability without squashing the life out?”

The Trust’s answer has been to bring in the right people to walk alongside and assist the groups, through the capacity partners and evaluation support.

What next?

The MPEI is now half way through its first five year term and the Trust is looking at the sustainability of the fund, how it might be scaled up or replicated, how it may evolve, and opportunities to influence government policy and funding. The evaluators are strongly involved in these processes.

“Get the front-end and the process right and you will get better outcomes.”

4. Research, build capacity, invest in the new

ASB Community Trust

Grants Advisor Shalini Pillai

The practice

- Significant multi-year funding of a few groups
- Working closely with applicants and investing in capacity and sector building
- Funding new, innovative programmes for youth in Auckland and Northland, or existing organisations collaborating in new ways
- The aim is to improve health and social outcomes for young people aged 12 to 24.

Why and how?

The 2008 economic recession resulted in a six month hiatus in funding for the ASB Community Trust, which allowed time for a strategic review. Trustees indicated an interest in young people and research was commissioned on the health and wellbeing needs of youth aged 12-24 in Auckland and Northland (Taylor: May 2009).

The Youth Health and Development Fund (YHDF) was established in late 2009, with first applications closing in February 2010 and a funding pool of \$2.5m. Seven of the 20 applications were approved for one to four years of funding, with multi-year funding going out in each funding round. Four organisations were funded in 2011 (\$2m in total).

Trustees shortlist applicants to move into a proposal development phase. Capacity Development Partners (independent consultants) help each group to build their skills and develop their proposal and self-evaluation plans. Group workshops also occur for the cohort. Final approval is based on a project plan, capacity development plan, evaluation plan and budget.

One to one and group support is provided throughout the multi-year grant. Grantees can use this support to measure outcomes and work on programme, organisational, sustainability or sector issues.

Gems

This fund is based on expertise – Trust staff consulted the youth sector and an expert group advised the Trust on how it could proceed.

Perceived strengths of the fund include allowing time for a group to develop their initiative, free access to mentoring and capacity development via Capacity Development Partners and making connections within and between cohorts: “Peer support and organisational interaction are the beauty of this fund.”

Young refugee women learn new skills with the Refugee Youth Action Network (RYAN), funded by the Trust – source: Refugees as Survivors



Further strengths are stronger relationships between the funder and grantees, which supports mutual responsiveness and frankness on all sides, as a climate of honesty and trust is developed. There is also a learning focus within the fund which sits across all components. Positive outcomes for young people – such as better connections between youth, families and schools – are starting to emerge, with more anticipated.



Challenges

No funding is provided during the application process – each organisation must have the resources to take part in an intensive process. In the first cohort, a number of smaller organisations indicated that this was difficult.

A key challenge has been getting the organisations to take on the importance of evaluation given other priorities: “Some of the organisations hadn’t done evaluation; some larger ones had evaluation done to them.”

Evaluation

Evaluation is built into all projects, with a focus on self-evaluation. Grantees report that increasing their evaluation capability has been useful, and that it has supported the development of organisational learning cultures.

Lessons and advice to others

- Give thought to funding organisations through the planning phase
- Connect and engage trustees from the funding and grantee organisations through launches, end of year celebrations and other events
- Be clear about the organisations suited to this fund – they need to have the capacity to take part, think strategically and be open to being challenged
- Consider implications if the project or organisation falters
- Given the importance of relationships in this fund, consider how to sustain it if key people leave, from both the funder and provider sides
- Invest appropriately, especially in the right people.

This approach requires significant amounts of funding, investing in capacity development and staff capability to work closely with applicants. As with recipients, fund managers need peer support and opportunities to share and learn, for example through the national Youth Funders Network.

Overall: “It is a challenging road but worth it – people’s lives are affected. Work with those who can leave their egos at the door.”

What next?

The Trust’s next strategic plan is due in August 2012 and the future shape of the fund will be influenced by strategic direction and the global market situation.

“It is a challenging road but worth it – people’s lives are affected. Work with those who can leave their egos at the door.”

5. Investing in community-led change

Bay Trust

Community Development Advisor Terri Eggleton

The practice

- A one-off fund providing significant multi-year funding for up to three community-led projects
- A two stage application process, with experienced consultants providing capacity-building support for shortlisted applicants
- Aims were to make a lasting difference in a local community by addressing an issue or challenge within that community, build capacity and encourage collaborative approaches.



Why and how?

In late 2009, \$500k became available at Bay Trust and trustees decided to try something different. The Henry Duncan Fund was established, named after the Scottish church minister who set up the first savings bank scheme in 1810.

In March 2010, trustees decided to seek high-impact, transformative projects for one or two communities (rather than several smaller grants across sectors and communities) and a subcommittee established basic framework and criteria. Trustees agreed it was up to the communities to define their own issues, across a broad range of categories. Criteria stipulated that initiatives be community-led and supported, address root causes and produce long-term outcomes. Requests for expressions of interest were sent out in September 2010.

Of the 35 applications, seven attended a two day capacity-building workshop on programme logic, theories of change and evaluation. Four proposals were presented to trustees and two were approved for funding in May 2011 – a farm school in the Bay of Plenty and a healthy homes project in Kawerau.

Gems

This approach lets communities determine the priorities and goals, which may not be what the Trust expects or considers priorities.

Providing capacity-building support was seen as particularly valuable, as it enhanced the capabilities of groups and helped develop proposals. Participants reported enjoying the opportunity to come together and learn from each other, being challenged, the opportunity to self-critique with new tools, move past the 'elephant in the room' (that they were competing with each other for funding), share stories and pick up new techniques for planning and evaluating.



Other perceived successes include concentrating funding in one area to make a real difference, gaining in-depth knowledge of specific localities and groups and an appreciation of the complexity and depth of knowledge in a community. The process has allowed BayTrust to develop good relationships and raise its profile and reputation in the process, especially by being honest with groups that they won't all get funded and about the effort required of them to apply to this fund.

Challenges

The approach is demanding on BayTrust staff and applicants in terms of time and energy. A further challenge was getting trustees to agree on the focus and criteria for the fund. Finding the right funding agreement to wrap around the funding was another challenge – ultimately it was adapted from those used by the ASB Community Trust's Māori and Pacific Education Initiative and Youth Health and Development Fund.

Evaluation

The funded projects have an evaluation requirement built in, which either involves self-evaluation or external evaluation, depending on their type and scale.

Lessons and advice to others

Advice to others interested in such an approach is: “Be brave. Be prepared to put the time in. Listen to what the community wants, not what the Trust wants – respect where the community is at. Be upfront about the process and the time and resources involved. Nail the criteria and intent with the trustees – stick to that and induct new trustees well.”

What next?

The Henry Duncan Fund has now been allocated. Trustees have agreed in principle to use \$250k of normal grants funding for a similar process. This is likely to be another high-engagement model, involving calling for expressions of interest, capacity building around a shortlist of proposals and assessing these proposals against clear criteria.

“Be brave. Be prepared to put the time in. Listen to what the community wants, not what the Trust wants – respect where the community is at. Be upfront about the process and the time and resources involved.”

6. Walking together for social change

Todd Foundation's Partnership Fund

Executive Director Kate Frykberg

The practice

- Significant funding is provided for up to five years for any purpose that advances the recipient's vision
- Up to five organisations which have previously been funded by the Todd Foundation are invited to apply annually
- Additional match funding can be provided for professional development
- Recipients come together annually for a two-day hui to share what they are learning
- The aim is social change through supporting groups to realise their vision, strengthen their organisation and connect with others.



Why and how?

The spark for this fund was a speaker at a 2008 Philanthropy New Zealand Funders Forum⁴, who identified three funding practices that hinder positive outcomes: short-term, tightly prescribed funding based on weak relationships. This was considered alongside business investment models that undertake due diligence and fund if they like what they see, without any restrictions on how the money is used.

Each year desk research is undertaken and trustees indicate an area they would like to focus on. Previous Todd Foundation grantees in the chosen focus area are shortlisted and invited to present a proposal to each other and to trustees. Groups are asked in their proposal to identify their vision, plans and dreams, strengths and areas for development. In 2011, the focus of the cohort was on child advocacy, in 2010 on youth transitions and in 2009 on intergenerational learning.

Since 2009, 11 organisations have received Partnership Funding, and the first cohort is now in the fourth year of its five year funding period.

Gems

As an invitation-only fund, to some extent the due diligence around the organisation has been done and a relationship is already in existence.

Through presenting proposals to their peers and regular hui, communities of people with shared goals and peer support networks are created: "Magic is created in getting people together." These hui are now evolving into leadership development retreats, with the Foundation providing the space while recipients run them.

"Magic is created in getting people together."

⁴ Courtney Bourns, Director of Programs at Grantmakers for Effective Organizations

The fund has reportedly created a forum for debate and an environment beyond the usual 'funding game', whereby funders provide money and organisations in turn paint a rosy picture of their work. By forming strong relationships funders and recipients can learn together, be more open and create a community working towards the same ends. "Funders are part of the community – not sitting above, bestowing funding. It feels like we are working together to maximise social change without the stuff that gets in the way in the funding game."

Other perceived positive aspects include reflecting good practice in the funding approach, letting go of control and seeking to balance out the power dynamics between the funder and recipients. The onus is on the goals sought, trusting people and "putting the power back into organisations".

Recipients gain funding security, the ability to experiment, a way to connect with their peers and a vote of confidence: "It allows us to plan ahead and weather storms."; "It makes our organisation feel valued as a whole."⁵ None of the projects or recipient organisations has faltered to date.

Challenges

One challenge is the forward financial commitment required. Other Foundation funding is only for two to three years, due to the size of the financial commitment made through this fund (\$1.2m minimum per year from a total budget of \$4.8m).

Another challenge is how to genuinely measure impact and the extent to which people are realising their vision. While some evidence is being gathered: "We are not at the stage where we can measure impact very well; it is still a work in progress."

Evaluation

A baseline for each organisation is gained from their initial proposal. Six-monthly reporting occurs and every second year organisations are asked to report on progress towards their vision. There are plans to bring in expertise to support the organisations to strengthen their own processes around evaluation.

"It feels like we are working together to maximise social change without the stuff that gets in the way in the funding game."

Lessons and advice to others

A message to other funders from this experience is: "Give it a go. This seems to be a better way of funding for everyone involved."

What next?

The medium-term future of the fund is described as secure. The Partnership Fund is part of ongoing exploration by the Todd Foundation as to how it can respect the uniqueness and autonomy of each organisation, while expecting them to maximise their impact. Work is also currently underway to support the transition of early fund recipients to alternative sustainable funding.

Big Buddy mentoring for fatherless boys – another Partnership Funding recipient



⁵ These quotes are drawn from progress reports to the Todd Foundation

7. Leading system change

Wayne Francis Charitable Trust

Trust Administrator Sally Mountfort

The practice

- Leading a process to identify a need and develop a new response
- The aim was to respond more effectively to an identified need – supporting the successful transition of disabled young people from school to post-school life.



Exploring Futures - resource booklet for families and young people with disabilities preparing to leave school

Why and how?

In 2005, the trust asked six experienced youth workers to identify funding opportunities to address key issues for young people aged 10 to 19 years. This process took 12 months and involved an external facilitator and a range of experts. One of the group's recommendations in 2006 was to support the successful transition of disabled youth from school to post-school life.

Work on this issue began in 2007 and ended in 2010⁶. A stakeholder advisory group was created and research was workshoped intensively with the wider youth sector, including young people and their families. Influential people were engaged, including government policy makers, who were brought around a table with parents, disabled students and other stakeholders to design a solution.

The result is the 2009 Lead School Transition Model⁷, which is currently being piloted in Christchurch over five years in nine schools, to 2014. The model aims to build the capacity of schools to design a clear, tailored pathway for each student from year 10. The pilot is guided by a multi-agency steering group which includes youth and parent representatives. A 10 point best practice framework for disabled youth transition into adulthood has also been developed from this initiative, called the Transitions Toolkit.

Gems

This project has influenced government practice, could lead to national policy and programme change and is potentially creating significantly better outcomes for young disabled people. Those running the programme say students have more involvement in decisions affecting their lives. For example, one student with an intellectual disability ran a meeting about her aspirations using a Powerpoint presentation which outlined her strengths and interests.

A key strength is perceived to be gifted facilitation throughout the process, especially at intersectoral forums, that highlighted shared interests and goals. Further strengths were people seeing how inclusive the process was and the importance of getting key people in the same room.

The project has cost approximately \$180,000 over three years, including some set up costs for the Lead School Transition Model pilot. The return on investment is considered good to date, with nine schools operating differently and 300-400 young disabled people receiving enhanced preparation for life after school. The project focus is on using existing money in the system differently, rather than adding new funding. As such, the principals of nine schools have relinquished a small percentage of Ongoing and Reviewable Resources Scheme (ORRS) funding for this initiative, which can also be applied to non ORRS students.

"Focusing on funding systemic change can be risky, but is hugely rewarding."

Challenges

Key challenges included getting influential government representatives around the table; this was eventually achieved after a ministerial directive for people to get involved.

The power of individuals and an element of luck was made clear:

“One person can lock or unlock doors; at the end of the day it’s one person or moment that can make the difference.”

The process was described as hard work but worth it, requiring significant people skills and leadership: “It’s all about people.”

Lessons and advice to others

- The importance of keeping an open mind as to where the process went and not seeking a particular end result: “I put my toe in the water to see where the ripples took me.” This required trustees to be creative, take a risk and allow staff to lead this process, with appropriate involvement and reporting
- Take time for a good process and bring all stakeholders together, especially those most affected
- Develop a good advisory group but trust your own instincts.

The experience of this project affirms the Trust’s view that it can provide far greater support than funding, in terms of advocacy, leadership, facilitation and advice. A key perceived lesson is that: “Focusing on funding systemic change can be risky, but is hugely rewarding.”

What next?

If evaluation findings are favourable, the aim is for this model to be rolled out to other centres. The Trust aims to promote the process it used as a model of best practice for others to influence policy and effect system change.

*“I put my
toe in the
water to
see where
the ripples
took me.”*

⁶ As described in a case study report on this project called *Creating Long Term Policy Change: The Wayne Francis Charitable Trust*, 2010, unpublished.

⁷ See <http://www.allenvale.school.nz/lead-school-transition/>

8. Facilitating community wishes TSB Community Trust (TSBCT)

Trust Manager Maria Ramsay, Trust Communication, Policy and Research Advisor Danae Etches,
Clifton Park Project group members

The practice

- Facilitating a stakeholder process to achieve community outcomes
- The primary aim is to increase the participation of the Waitara community in sport and recreation, by engaging the Waitara community in the future development of Clifton Park.

Why and how?

In August 2010 the TSB Community Trust (TSBCT) received an application for funding towards the construction of a regional gymnsports facility at Clifton Park, in the Waitara area of Taranaki. The application raised questions and the TSBCT decided instead to fund a \$10,000 feasibility study to explore community needs.

A multi-stakeholder project group developed a project plan and oversaw a community consultation process. Specialist sport and recreation input was jointly funded by TSBCT, Taranaki Electricity Trust (TET) and the New Plymouth District Council.

Project team members visited other multisport facilities and TET and TSBCT jointly submitted on the Council's draft Sports Park Management Plan.

TSBCT's facilitation role in the Clifton Park Project reflects its desire to be more deliberate about making a difference in the community and to try different approaches. Key TSBCT roles in the Clifton Park project include facilitation, coordination, relationship and network building.

Gems

From the TSBCT perspective, positive results to date include better working relationships with the Council, other organisations and community leaders as well as the building of trust and opening the door to future joint planning and collaboration. TSBCT also has a clear sense that this process will lead to greater community benefits.

The creative aspect of the project is considered to be its strategic, high-level partnering approach and the way it models collaboration. Council, TET and TSBCT are also looking at how to support the capacity and sustainability of key existing organisations and any new community organisation that is formed as a result of this project.

The project reportedly shows the value of funders playing a coordinating role, as they can have a less vested interest than others, while their role as funder provides an incentive for people to take part: "Philanthropics are in a good spot to facilitate – if we call a meeting people come."



A true collaboration – some of the funders, community, local authority and regional sports trust representatives working on the Clifton Park project

"Philanthropics are in a good spot to facilitate – if we call a meeting people come."

Challenges

Challenges include balancing different interests, agendas and multiple governance requirements, keeping options open, the significant time required and the pressure that this way of working can place on staff. The joint funding and selection process of consultants by TSBCT, council and TET also involved 'vigorous debate'. Trustees have been engaged through regular reporting and staff members have been transparent about the time and resources involved. A key issue for the TSBCT is when to walk away from a project such as this, yet still ensure that it has the people skills and resources to succeed.

Evaluation

The Clifton Park Project process has been well documented and there are plans to evaluate the initiative further down the track. Measuring the value of collaboration will be one evaluation aim.

Lessons and advice to others

For the TSBCT, lessons for funders considering a similar approach include making sure you identify all stakeholders; be open and don't go in with preconceived ideas; be flexible in order to respond to an unpredictable collaborative process; be persistent; communicate well and give clear messages; be prepared to deal with entrenched views; keep a sense of humour; develop a supportive staff team and always keep an eye on the bigger picture – the outcomes sought. "The lesson is to start – you just have to learn to bite your tongue, listen and sit back a bit. Be prepared to change, to lose, to be challenged."

Another lesson is the need to develop a joint view early on as to what the project aims to achieve, what the relative roles are and the expectations of those involved. "We haven't always been clear on getting a joint view on what the goals and vision are – it's good to surface these early and articulate them." This sets a baseline from which to gauge progress and changes.

The Project Group describes the initiative as a ground up process that is a first for Waitara: "All stakeholders were at the starting line together. The usual model is someone doing a plan and going out to the community."

Further lessons include: involve people early; motivate people to think outside the square; resource community involvement; focus on shared interests; don't make assumptions about people's capacity and ability to deliver (discuss capacity issues); take time to build trust through an inclusive process and start how you mean to continue: "Getting everyone together at the beginning is the best way to start."

A further key message is to focus on sustainable relationship development, not just the end result: "Don't focus on the facility as the only goal, make relationships and capacity building a goal." All parties have learnt that funders and councils are not just about providing money – they have other valuable resources such as administration, advice, connections and influence.

What next?

The Clifton Park Project is likely to result in ongoing work to build the capacity of local organisations and potentially some kind of multi-use facility. TSBCT also aims to evaluate the Clifton Park Project and identify other complex grant making opportunities. The TSBCT will engage expertise to support this; for example consultants who can provide capacity development support, evaluate complex grant making approaches and assist the TSBCT to respond to different opportunities.

Clifton Park is viewed by the TSBCT as a pilot, though staffing has recently increased to allow more of this type of work to continue: "We are changing our mindsets about what we can bring to the table."

"We are changing our mindsets about what we can bring to the table."

9. Being the change you want to see

The Working Together More Fund, He Pūtea Mahi Tahī

Fund Administrator Barbara Edwards, JR McKenzie Trustee Patrick Cummings,
Todd Foundation Executive Director Kate Frykberg

The practice

- A funder collaboration, in which five funders contribute towards one fund
- The fund provides seeding money and expertise to develop collaborative arrangements
- The aim is to support positive outcomes through collaboration.



Why and how?

Early in 2009, representatives from four family trusts – JR McKenzie Trust, Tindall Foundation, Todd Foundation and the Wayne Francis Charitable Trust – met to consider what they could do in response to the 2008 economic recession. A key driver was a concern that there would be increased demand for community and social services, within a tightening funding environment.

The four funders contracted some research to see how they might fund collaboration and in October 2009 launched the Working Together More Fund – He Pūtea Mahi Tahī (WTMF). The fund assists community groups to make a greater difference, through two or more groups working together.

Each of the funding organisations contributes annually to the fund. A consultant was contracted part-time to administer the fund and a committee involving representatives of all funders was formed to make decisions. In October 2011, the Hugh Green Foundation joined the group as the fifth member. Grants range from \$1500 to \$25,000 and in 2012 there are three funding rounds.

Gems

Applicants reportedly like the fact that the fund itself is a collaboration and is modelling the behaviour it seeks to support. Another positive is that it provides basic funding to build the relationships and trust that are required for collaboration to work.

Resourcing people to come together to see what is possible is the perceived virtue of this fund: “Almost without exception, all the groups say that regardless of where the initiative goes, their understanding of others is much better and that getting together with others is valuable.”

Challenges

Challenges include the time it took to set the fund up and to make decisions: “Collaboration doesn’t move quickly, with five organisations making a decision.”

One person noted that some applications to the fund do not fully meet its intent and are either unrealistic or not for collaborative purposes. There are no discernible trends in terms of who is applying to this fund: “All shapes and sizes apply.”



Funders and applicants alike acknowledge the challenges associated with collaboration, including the time and people resource it takes, the skills required, ensuring continuity and commitment if key people leave and issues with sharing or relinquishing control.

Evaluation

The fund was evaluated after a year to identify areas for improvement and assist future decision-making. Most grantees noted that the WTMF had either enabled or improved their collaboration. Around a third of grantees felt that providing funding after the seeding process would be desirable, and there was also support for broadening the funding criteria beyond seeding money.

Lessons and advice to others

- Hire an external contractor to administer the fund, who sits outside the funding bodies and can walk a line among them
- Trust is needed among the funders to give and take
- Multiple levels of communication are needed to keep staff, management and trustees on board
- Try to ensure that an environment of trust, flexibility and support surrounds the fund, and that funders can come and go at will.

Some suggested there was a need to better publicise the fund and be more proactive in channelling groups towards it. Applicants supported the idea of receiving assistance for capacity development and for refining their application, as part of the application process. Providing post-funding support to access alternative funding sources was also suggested.

What next?

While the fund is perceived to be meeting a need, next steps need to be worked out. Seed funding – money which starts a project off or tests an idea – often creates a need for further funding, so supporting groups to find this funding and allowing the funding to be used more broadly than for seeding purposes may be considered in the future.

The experience through this fund is that collaboration tends to be a harder but more rewarding road for those who wish to travel it: “If you want to do things quickly, go it alone. If you want to go far, go together.”

“If you want to do things quickly, go it alone. If you want to go far, go together.”

References

Grantmakers for Effective Organizations (GEO), (2010, second printing), Listen, Learn, Lead: Grantmaker Practices that Support Nonprofit Results, Washington DC, accessible at: www.geofunders.org

Taylor, Alison, Sinclair Taylor Consulting Limited (May 2009), Youth Health and Wellbeing Advice Paper, ASB Community Trust, accessible at: <http://www.asbcommunitytrust.org.nz/research-resources/youth-health-development>

Other Useful Resources

GEO website to help nonprofits' impact, www.scalingwhatworks.org

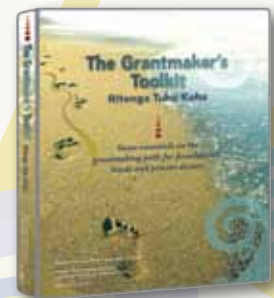
How Do We Build the Capacity of Nonprofits to Evaluate, Learn and Improve? By Kathy Brennan and Dara Major, accessible at: www.geofunders.org

Grantees Report Back: Helpful Reporting and Evaluation Processes, accessible at: www.effectivephilanthropy.org

Do More Than Give: The Six Practices of Donors Who Change the World by Leslie Crutchfield, John Kania and Mark Kramer – a set of “catalytic practices” grantmakers can adopt for greater impact, accessible at: www.domorethangivebook.com (available from Philanthropy New Zealand)

Stanford Social Innovation Review article on the common factors across cross-sector partnerships, accessible at: www.ssireview.org/articles/entry/collective_impact

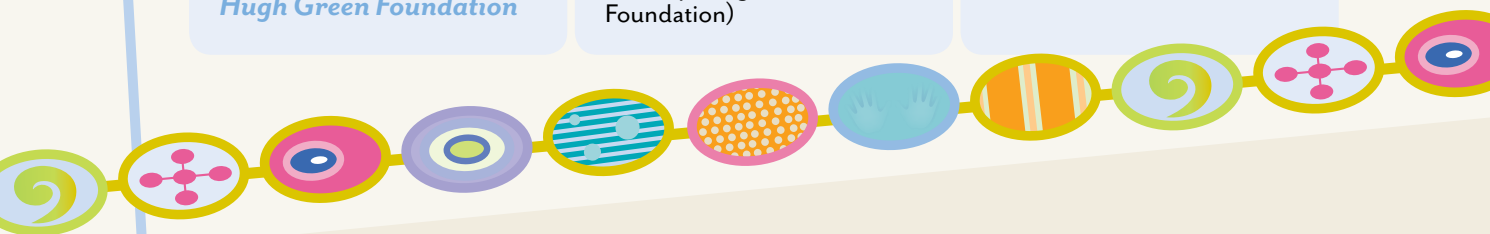
The Grantmaker's Toolkit: Contains ideas, observations and challenges to support any grantmaker, whether a beginner or a seasoned player, whether staff, trustee, personal donor or advisor. Tailor-made for the New Zealand philanthropic sector, you will find practical information, worksheets and checklists, personal perspectives, and selected case studies of promising practices to illustrate successful work of grantmakers in the field. For more information please contact Philanthropy New Zealand, email: info@philanthropy.org.nz



List of participants

This table lists the organisations and individuals who were interviewed for this research, plus the name of the initiative/s involved.

Organisation	Individuals interviewed	Initiative
<i>Bay Trust</i>	Terri Eggleton	Henry Duncan Fund
<i>Vodafone Foundation</i>	Annette Culpan Sum Tran	World of Difference and Youth Health Fellowship Fund
<i>ASB Community Trust</i>	Moi Becroft Shalini Pillai	Māori and Pacific Education Initiative and the Youth Health Development Fund
<i>Todd Foundation</i>	Kate Frykberg	Partnership Fund
<i>Trust Waikato</i>	Bev Gatenby Rongo Kirkwood Alice Anderson, Hauraki Māori Trust Janise Eketone, Maniapoto Māori Trust Muna Wharawhara, Te Hauora o Ngati Haua	Strategic Partnership with Iwi
<i>Wayne Francis Trust</i>	Sally Mountfort	Lead School Transition Model
<i>TSB Community Trust</i>	Danae Etches Maria Ramsay Clifton Park Project group members	Clifton Park Project
<i>Todd Foundation</i> <i>J.R.Mckenzie Trust</i> <i>Tindall Foundation</i> <i>Wayne Francis Trust</i> <i>Hugh Green Foundation</i>	Barbara Edwards (Administrator) Patrick Cummings (JR McKenzie trustee) Kate Frykberg (Todd Foundation)	Working Together More Fund



“Perhaps the key message from this research is that magic can happen when people with shared interests are skillfully brought together and supported to explore what is possible.”

Rachael Trotman, Researcher

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