

# Philanthropy News

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## Drivers of change

The case for change in driver licensing

### Jane Goodall's reasons for hope

Philanthropy Summit  
2019 keynote speaker

### The Whitman Institute's trust-based approach

Adding trust to  
grantmaking

### Investing to make a difference

Making social change  
through investment



**Philanthropy  
New Zealand**

*Tōpūtanga Tuku Aroha o Aotearoa*

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## From the CE

Kia ora koutou

On the eve of sending this magazine to print, the 15 March terrorist attack had just taken place. Our hearts go out to you all, particularly those connected to the Christchurch families affected and the Muslim community nationwide.

We also acknowledge that this is yet another tragic event for Cantabrians to cope with, and it's highlighted the everyday discrimination many people in Aotearoa experience.

We're now looking at how we can support the philanthropic sector to respond to this tragedy—in both the short-term to assist those affected, and the longer-term to support peacebuilding and address discrimination.

We are adapting the Summit programme to support attendees as to how to respond to the event and build an inclusive society.

The content in this magazine was written prior to this attack, however parts of it—like The Whitman Institute's approach to trust-based philanthropy—feel very relevant.

### **Philanthropy's biggest event is nearly here**

The biggest event in Philanthropy New Zealand's calendar—the Philanthropy Summit 2019: The Future of Trust—is now merely two blinks away.

The Summit is a chance to take a break from the day-to-day doing, undertake some blue sky thinking, explore the issues we face, get inspired and take away new tools and ideas to put into practice.

I also feel assured that it will live up to its whakataukī: Te pono, te tika, te māramatanga me te aroha anō o tētehi ki tētehi (in truth, and with integrity, understanding the impact of giving and receiving from one toward another). This is due to the powerful topics that members and stakeholders have suggested for its content, and because of the membership's huge appetite for the philanthropic dollar to do even more good.

Dr Jane Goodall, one of our Summit keynotes, has been quoted as saying: "The greatest danger for our future is apathy." After four months in the job, I know that thankfully, apathy is not a problem in the philanthropic sector. I look forward to meeting more of you at the Summit.

Ngā mihi

**Sue McCabe**

## News

### Board update

Since our last edition of *Philanthropy News*, **Sandra Kai Fong** has indicated her wish to resign as the Chair of Philanthropy New Zealand due to other commitments, but continues as a valued Board member.



The Board elected **Ken Whitney** as the new Chair of Philanthropy New Zealand. Ken has been on the PNZ board since December 2016.

*Read more about Ken, and his thoughts on this role and the future of philanthropy on page 15*



At the Philanthropy New Zealand AGM on 6 December, PNZ members also elected **Christina Howard**, Executive Director of the Todd Foundation, to fill the one PNZ board vacancy this year. Christina has spent 20 years working in community, academic and government roles before joining the Todd Foundation in 2010. She holds a PhD in social psychology.



### Welcome to our new members

Simplicity  
 Tauranga Energy Consumer Trust  
 Lindsay Foundation  
 Ryan Eagan  
 John McLeod  
 Gregg Brown Family Trust  
 Te Pūtea Whakatupu Trust

#### Community Members

The Wellington City Mission  
 Salvation Army



### Sector appointments and departures

We welcome **Mark Longbottom**, who takes the helm at **Auckland Foundation**.

We farewell **Carol Melville**, who after 30 years at **Otago Community Trust** has retired. She was appointed as the first Chairwoman in 1988, when the Trust was established. After leaving the Trust's Chair role, she took on the role of Grants Manager.

Farewell also to **Simon Bowden**, who has been the Executive Director at the **Arts Foundation** for the past 17 years, **Louise Parkin** at the **Nikau Foundation**, who has headed to the UK with her family, and **Wei Siew Leong** at **Top of the South Foundation**.

Congrats to **Melissa Gibson**, the Chair of the **Len Reynolds Trust**, who gave birth to baby Estelle in September 2018. One of the several 'philanthrobabies' we're expecting within the next six months!

### Youth Giving network pilot in Queenstown



A group of Queenstown teenagers have banded together to develop the Generation Give youth philanthropy programme in partnership with the Wakatipu Community Foundation. The aim is to teach students at Wakatipu High School how to be philanthropists, and the next generation of community and not-for-profit leaders.

Twenty students will be selected for a high-engagement seven month programme. Students will be forming, leading, and governing their own mini-foundation, all led and directed by youth. The curriculum will include meeting with guest speakers and organisations including Sir Eion and Lady Jan Edgar, Dick and Diana Hubbard, Mayor Jim Boulton, Community Trust South and Central Lakes Trust.

The students will have \$10,000 to grant to local charities at the end of the course, with generous donations collected by the Wakatipu Community Foundation from local residents, corporate sponsors, as well as support from a national foundation.

This is a pilot for a Generation Give national programme to be rolled out.

Follow the progress on the Youth Philanthropy New Zealand Facebook page [facebook.com/ypnz.org](https://www.facebook.com/ypnz.org) or website [YPNZ.org](http://YPNZ.org)

## Events

### Philanthropy Summit 2019

15-17 MAY WELLINGTON

Join Kiwi and international philanthropic thought leaders, innovators and experienced practitioners at the New Zealand Philanthropy Summit at Te Papa in May.

It's a unique opportunity to hear from: **Vu Le** of NonprofitAF.com; **Dr Jane Goodall** of The Jane Goodall Institute; **Sir Stephen Tindall** of The Tindall Foundation; **Jennifer Gill**, CEO of Foundation North; and **Ani Mikaere**, Co-director of Te Kāhui Whakatupu Mātauranga. A keynote panel focussed on the future also includes economist **Shamubeel Eaqub**, demographer **Dr Tahu Kukutai**, journalist **Rod Oram** and entrepreneur **Matthew Monahan**.

For the full programme including all keynote speakers and breakout sessions visit [philanthropysummit.org.nz](http://philanthropysummit.org.nz)

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### Other events in 2019

20-21 AUGUST GREAT GRANTMAKING!  
WELLINGTON

Copthorne Hotel, Oriental Bay, Wellington

New Zealand's only training specifically created for grants advisors and other 'philanthocrats' working in trusts and foundations, local and central government and corporate philanthropy.

This professional development programme increases knowledge and proficiency and provides resources to address ongoing professional challenges. An emphasis on peer learning, guest presenters and breakout sessions will ensure the programme is relevant for staff in the sector, regardless of time in the role.

11-12 SEPTEMBER GOVERNANCE AND INVESTMENT, WELLINGTON

For more information on upcoming events please visit [philanthropy.org.nz/events](http://philanthropy.org.nz/events)

### Future and Trust Whakataukī and quotes



Te pono, te tika, te  
māramatanga me te aroha  
anō o tētehi ki tētehi  
In truth, and with integrity,  
understanding the impact of  
giving and receiving from  
one toward another

Philanthropy Summit 2019 whakataukī

The greatest danger  
for our future is apathy

Dr Jane Goodall

We are, after all, only trustees  
of the wealth we possess.  
Without the community and  
its resources... there would  
be little wealth for anyone

John Ruskin

The past cannot be  
changed. The future is  
yet in your power

Mary Pickford

# Dr Jane Goodall: Opening hearts and minds



*Dr Jane Goodall beside  
a waterfall in Gombe National Park  
Photo credit: The Jane Goodall  
Institute / Bill Wallauer*

In July 1960, equipped with little more than a notebook, binoculars, and her fascination with wildlife, Jane Goodall travelled from England to what is now Tanzania, Africa. She braved a realm of unknowns to give the world a remarkable window into humankind’s closest living relatives—wild chimpanzees.

The revolutionary discoveries that Dr Goodall made at the now Gombe National Park in Tanzania, suggested that many behaviours once thought to be exclusively human may have been inherited from common ancestors that we shared with chimpanzees millions of years ago.

Today, Dr Jane Goodall is an iconic figure and one of the most prominent female scientists of the 20th century. She has authored dozens of books and mentored new generations of scientists and changemakers. Her awards for her humanitarian and environmental work are numerous, and include the United Nations Messenger of Peace, and Dame of the British Empire.

## Story-teller and activist

Now 84, Jane travels 300 days a year to share her story, opening hearts and minds to tackle the challenges we face. She lobbies governments, visits students, and gives speeches to raise awareness of the harm we are inflicting on other species and the natural world, and provides solutions for protecting wildlife and its habitats.

Dr Goodall discovered that when we put local communities at the heart of conservation we improve the lives of people, animals and the environment. With this knowledge, in 1977, she founded **The Jane Goodall Institute (JGI)**. Its vision: A healthy planet where people live sustainably and in harmony with animals and our shared environment.

The work the Institute undertakes includes: sustainable development initiatives, conservation research, protecting biodiversity and providing education on sustainability issues. In 1991, Dr Goodall also founded The Jane Goodall Institute’s global education programme **Roots & Shoots**, now in almost 100 countries. The programme empowers younger generations to implement projects that make a difference for animals, people and the environments in their communities.

At the World Economic Forum in Davos earlier this year, she launched the **Jane Goodall Legacy Foundation** to ensure her lifetime’s work continues in perpetuity. “I hope that we can create an endowment that will enable the programmes I have developed to continue, new ones to be initiated, and so that the fight for the good of the natural world will continue beyond my lifetime.”

## The New Zealand Connection

In 2014, Dr Melanie Vivian co-founded a chapter of **The Jane Goodall Institute in New Zealand (JGINZ)**, joining 27 other chapters around the globe. JGINZ is committed to community-centred conservation and inspiring individual action. Alongside JGI’s international sustainability projects, they also work on projects specific to New Zealand, such as climate/tree planting initiatives, threatened species and sustainable resource campaigns, alongside

delivering the Roots & Shoots programme in New Zealand schools and communities.

## Reasons for hope

In spite of the tremendous challenges facing humanity, Dr Goodall’s reasons for hope are, in her words, “simple”:

- The energy and commitment of youth
- The human brain’s ability to develop innovative solutions
- The resilience of nature
- The indomitable human spirit to tackle seemingly impossible tasks and not give up
- The power of social media to create change.

## Philanthropy Summit 2019

Dr Goodall is a keynote speaker at the Philanthropy Summit 2019: The Future of Trust. This is a unique opportunity to hear her talk specifically on the role philanthropy can play in the challenges we face, along with reasons for hope.

“I want everybody to understand that as an individual each one of us makes a difference. We make some impact on the planet every single day. We have a choice what sort of impact we will make, and we need to start thinking about the consequences of the small choices we make.”

*Don’t miss Dr Jane Goodall at the **Philanthropy Summit 2019, Wellington, 15–17 May***



Philanthropy  
Summit 2019

The Future of Trust

*Te pono, te tika, te māramatanga  
me te aroha anō o tēhī ki tēhī*

# Your Summit

This May, at the Philanthropy Summit 2019: The Future of Trust, a variety of internationally recognised speakers, innovators and game-changers will share their first-hand stories of trust in philanthropy, and predictions for the future of this sector. We look forward to hearing your voices in this remarkable mix of knowledge.

## The Summit content has been created by you, for you

The vision for this Summit was to build a balanced conference programme that provided a mix of perspectives, and provided space for the Philanthropy New Zealand community to put forward their big, bold ideas, to inform, challenge, question, debate and discuss.

In September 2018, we asked the community to submit ideas for content in the form of expressions of interest (EOIs). We were blown away to receive over 70 submissions. These EOIs then went through multiple rounds of consultation with both the Summit planning committee, and various advisory boards, to select and shape this content into a highly interactive conference that represents our membership, our nation and the global community we live in.

## Breakout sessions

There are four sets of breakouts that run throughout the Summit, with eight to 10 concurrent sessions in each that cater to the diverse range of attendees.

Each of the four sets of breakouts will focus on a specific theme:

## Highlights

### 1 The Future of Philanthropy

The changing political, social, economic, and natural world, the rapid creation of new wealth, and a greater awareness of how philanthropy can create social change is likely to lead to exciting innovation

and new thinking. This breakout identifies the current and upcoming changes relevant to philanthropy with concurrent sessions focussed on key areas including environment, education, technology, economy, and youth.

### 2 Relationships and engagement

This breakout looks at building and sustaining the relationships and community engagement we need to support good giving. It looks beyond just cheque book approaches to relational, hands-on methods and ways that embrace Te Ao Māori, to help organisations and build capability to deliver change.

### 3 The work we do

This stream will dive into the how-tos in philanthropy and grantmaking, including governance and operational practices, and other ways of working that might enable us to make bigger differences to social and environmental challenges.

### 4 Impact

What difference are we making and how do we know? This breakout focusses on how we tackle complex problems, measure the results and adapt, and philanthropy's role in advocating for change.

Some of the 30+ breakout sessions developed from the expressions of interest include:

**Community-Led Development 3.0 (Donating Power)** Megan Courtney (Inspiring Communities) and Seumas Fantham (Todd Foundation) will co-present this interactive workshop where participants can unpack and discuss opportunities and challenges for funders wanting to support more community-led development.

**The many strands of evaluation** PechaKucha sessions with a handful of evaluation professionals covering a mix of 'high level' thinking and practical skills around designing for, and evaluating impact—facilitated by Annette Culpan (Torokaha).

**Navigating complexity: future philanthropy** Our waka navigators were the boldest adventurers of their time, crossing the greatest expanse on the planet using only the sun, stars and wind. The challenge facing philanthropy is how to navigate complexity and adapt to change—with intent—to arrive at a new Hawaiki. This session looks at principles of wayfinding leadership, understanding our current course and plotting how philanthropy could chart a new direction into the future.

**The Advocacy Chain** Genevieve Timmons (Philanthropic Executive), Sarah Wickham (Research and Policy Manager, Philanthropy Australia) and Eileen Kelly (J R McKenzie Trust) discuss how some grantmakers can be part of supporting systems change, without directly funding advocacy activities, by supporting the links in the advocacy chain.

*To see a list of all of the keynote speakers and breakout sessions, visit [philanthropysummit.org.nz](http://philanthropysummit.org.nz)*

# Driving change: A case for change in driver licensing

For many New Zealanders, a licence to drive is a rite of passage and a significant milestone. Gaining our first licence not only gives us the right to drive, but offers a sense of freedom and confidence.

*But what of those who for a variety of reasons miss out on the opportunity? How do they fare in a society heavily dependent on having a driver licence—an environment where 70% of jobs require the applicant to have one?*

*A working group of Philanthropy New Zealand members have come together to see if there is a better, more strategic way to advocate or provide funding that tackles the many challenges of driver licensing.*

## Background

Local authorities began issuing licences in 1925, and when the Ministry of Transport took over in 1953, a simple 5-year renewal process was introduced. Since 1986, a graduated driver licensing system (GDLS) has been in place, consisting of three phases, each with varying conditions.

This system has improved road safety, but we no longer live in the New Zealand of 1986, and today there are far more acute reasons why people either have no licence or do not progress through the system.



*Alison Black from Youth Inspire with one of their driving students*

The Case for Change report was produced in 2016 by the Auckland Co-Design Lab, supported by a multi-agency team including the Accident Compensation Corporation (ACC) and the New Zealand Transport Agency (NZTA).

The report shows around **70,000–90,000 young people currently face major barriers while progressing towards their full licence**, a situation that requires a rethink if we are to tackle these challenges and develop a new generation of safe, competent drivers.

While the current system works for most people, it doesn't work for all. Sadly, the people who fall through the cracks are often those who are most at risk—not having a licence further perpetuates this, with a future of limited employment opportunities, significant fines (or incarceration) from illegal driving, and a raft of other issues which make it difficult to change their situation.

## Licensing issues

### Family-led model

Many Kiwis learn to drive in their teens, with early lessons typically coming from family members. While this family-led model is suitable for most of us, it's not always appropriate. Not all families can provide the skills, guidance and resources required to turn a young driver into a safe, adult driver with a full licence.

### Breaching restrictions

Nearly 50% of new drivers sit on their learner or restricted licence for up to 5 years, with 84% of young people breaching the conditions of their licence.

This means that illegal driving is normalised, particularly amongst young people, and when you consider that this group are also 6–8 times more likely to crash, it makes for frightening reading.



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The research showcases that 70% of all New Zealand jobs require the applicant to have a driver licence even if it is not used directly in their work environment.

*Alison Black from Youth Inspire with one of their driving students*

Seemingly, there appears to be no great sense of urgency to progress through the current system. A widespread acceptance of breaching the rules is partly to blame. Providing incentives to complete a full licence may be a better option.

#### **A short-cut to jail**

Mike Williams of the Howard League requested information from the former Minister of Corrections Office which highlighted that 9% of the prison population (about 900 prisoners) and 25% of community-based offenders (about 28,000) have convictions for licence/regulatory offences. Of these, approximately 40% are Māori males aged 20–29 years.

They also highlighted that 65% of Māori who go to jail commit a driving offence as at least part of the conviction which led to a first jail sentence.

#### **Costs**

Many believe the current ‘user-pays’ model is outdated. It costs around \$340 for the tests, assuming each is passed on the first attempt. Professional lessons will add anywhere from \$50 to \$75 per lesson to the bill, with NZTA recommending around 120 hours of practice before sitting a restricted test. For many people, this is a substantial investment, and they might think it is better spent elsewhere.

#### **Accessibility**

Accessibility is another issue, as time away from school or work is required to sit the test, and there are very few testing stations outside of the main centres. Learners in rural areas often face a long journey, in a registered and warranted car, and must be accompanied by a licensed driver—who often also needs to take leave from work or study—to access the licensing services.

In an increasingly multicultural New Zealand, the lack of translations is also a hindrance, excluding many migrant communities—another sign that the flexibility of the licensing system requires an update.

#### **Employment**

Besides the anecdotal evidence, further figures support investing in a modified driver licensing system to support employment. The research showcases that 70% of all New Zealand jobs require the applicant to have a driver licence, even if it is not used directly in their work environment. More people in work means happier local communities and a boost to the wider economy.

While there is no easy fix, the broader social and economic benefits to New Zealand when uptake of licensing is high is worth an investment in change, because conversely, we all bear significant costs when people opt out.

#### **Perspectives**

Youth Inspire is an organisation that would like to see all young people under 25 engaged in meaningful education, training or employment. They’ve found that having a licence is a key employment skill identified by businesses.

“The biggest hurdle for many of our students is actually getting ID to sit their learner licence. The costs involved in obtaining these documents are often costly. They also need access to support to help learn the Road Code in order to become safe road users—for me this is really important as we all want safe drivers on our roads,” says Alison Black, Youth Inspire’s Manager.

Alison suggests that accessibility is another major hindrance that could be drastically improved.

“When our young people go to sit their learner licence test there are limited places to do this and the capacity of these places means that the wait can be a couple of hours.”

Another study produced by Synergia for NZTA aimed to develop an understanding of the social norms around driving. They focussed on interviewing high-risk young drivers to get a sense of why they were breaking GDLS restrictions. One young parent on a learner licence explained why they breach conditions, while a student listed time and expense as major hurdles.

*"I should have my partner with me at all times, but then we need someone to look after the kids. I can't do both. What would be the point of both of us loading up the car with the kids, just to go and do a one-person job when he can stay home while I go out?"*

*"I don't have that 90 dollars right now [to sit the learner test]. And then I don't have the time to go off and study. I fall into that category of, 'okay if I get the fine I'll do the time'. I don't choose to deliberately go against the law. It's like I have no other option... it's a whole range of factors that contribute to why I'm driving without a licence, why my daughter's driving without a licence, why people continue to get fines here [in Mangere]."*

Across most of the interviewees there was a consistent theme—the GDLS in its current form is getting in the way of them becoming fully licensed, safe adult drivers.

## Get on Track, Stay on Track, Back on Track, Fast Track

The *Case for Change* report offers a compelling strategy for addressing these issues, with the motto: Get on Track, Stay on Track, Back on Track, Fast Track.



### Get on track

The report identifies a need to capture young Kiwis early, helping them see the value of having a full licence and providing wraparound support for those who need it.



### Stay on track

Providing encouragement and guidance to help those who struggle with the process, and to incentivise them to keep developing their safe driving skills.



### Back on track

Extra help and alternative methods may need to be employed to help those who struggle with the process, and to avoid a costly and destructive spiral.



### Fast track

Finally, there's a strong case for helping Kiwis to get their licence faster, which can be achieved without compromising driver competence and road safety.

But how is this achievable without charging users even more than they currently pay—one of the main reported issues with the current system?

There is hope. New Zealand was one of the first countries in the world to adopt a graduated approach to licensing, and the innovations suggested in the *Case for Change* report offer a chance for us to be leaders in any new methodology.

## Grantmakers' working group

Many within the philanthropic sector certainly appreciate the need for change and innovation, and a working group has been set up to get a better understanding of the driver licensing issues, and how they can be addressed.

"We [the Vodafone NZ Foundation] noticed a trend in our funding applications, with more and more localised driver licensing programmes and community driving schools seeking our funding. Communities around the country were identifying the same need for their communities and rangatahi—a need for access to education and resources for their young people to obtain driver licences. We realised that if we fund one group here, and one group there, it wouldn't be a strategic use of our funds," explains Helen Anderson from the Vodafone NZ Foundation. "We brought together a group of funders who were seeing similar patterns in their funding applications for an initial hui in late 2018 to see if there was a better way to approach this challenge."

So far, the group includes the Todd Foundation, J R McKenzie Trust, Vodafone NZ Foundation, Wayne Francis Charitable Trust, Philanthropy New Zealand and the Mayors Taskforce for Jobs.

"It's very early days regarding what we will do as a group. As a starting point we want to get a better picture of what, and how much, philanthropy in New Zealand is providing towards the challenges of driver licensing, and how we can be more strategic to create systems change," says Helen.

The working group have begun to hold discussions with different government groups working in this space to see what is already being done in this area, and have developed a one-pager for grantmakers which is based on the existing research, to highlight the key issues.

## Get involved

The working group welcome other funders to join this group to contribute ideas for the next steps, or to share data.

*If you want to get involved contact Helen Anderson, Grants Lead at Vodafone NZ Foundation:*  
[helen.anderson@vodafone.com](mailto:helen.anderson@vodafone.com)

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**"We noticed a trend in our funding applications, with more and more localised driver licensing programmes and community driving schools seeking our funding ... We realised that if we fund one group here, and one group there, it wouldn't be a strategic use of our funds. We brought together a group of funders who were seeing similar patterns in their funding applications for an initial hui in late 2018 to see if there was a better way to approach this challenge."**

**Helen Anderson**  
Vodafone NZ Foundation

# Trust-based philanthropy: Grantmaking with a lens of trust

## The not-for-profit perspective

Read **Vu Le's** straight-talking take from a not-for-profit perspective on trust-based philanthropy at [bit.ly/2XIJmxE](https://bit.ly/2XIJmxE)

*Look out for Vu's talk as a keynote speaker at the Philanthropy Summit 2019!*



Over the past decade, San Francisco based foundation The Whitman Institute (TWI) has been—in their words—mildly obsessed with the concept of ‘trust-based philanthropy’. Their approach recognises that often the traditional approach of a grantmaker to a potential grantee is one of suspicion—asking the not-for-profit to prove it is worthy of funds. TWI’s model attempts, to the extent possible, to mitigate power imbalances between funders and not-for-profits.

## About The Whitman Institute

Founded in 1985, TWI’s focus and approach has evolved extensively. Today, their multi-issue funding portfolio includes civic and community engagement, leadership development, human rights, movement building and media and journalism. It seeks to leverage the power of trust-centred investing to promote more equitable practices in resourcing social good.

For over a decade, they’ve made a point of making sure trust is embodied in their overall practice. At the heart of their trust-based framework is multi-year unrestricted funding, streamlined paperwork, and relationships and dialogue over hefty applications and reporting. They’ve gone beyond the cheque, which has included sitting on advisory boards, providing non-judgemental support during challenging transitions, and hosting retreats for grantees to unwind and unplug.

“What we hear from our grantee partners is that this approach helps them build and sustain healthier, more adaptive, and more effective organisations that result in stronger work and greater impact over time,” says TWI Co-executive Director John Esterle.

Not-for-profits are applauding their model. Vu Le, Philanthropy Summit 2019 keynote speaker, and past recipient of a TWI grant summarises this model in his blog NonprofitAF. “It saves us tonnes of time. It makes us more honest. It strengthens partnerships and improves morale. It makes us more effective.”

In 2011, TWI announced their plans to spend down their assets by 2022. Their six practices of trust-based grantmaking were developed after asking grantees for feedback on where they should focus their energies in the remaining decade. Overwhelmingly, partners wanted TWI to persuade other funders and donors at any scale towards trust-based practices. TWI are now focussing a portion of their remaining funds and energy to advocating, developing resources and spreading this message.

## The six principles

Over the years, TWI has distilled their practice into six key principles which embody partnering in a spirit of service with grantee partners. The idea is that entering into collaborations from a place of humility and listening enhances mutual learning and enables funders to respond more directly to the needs of partners.

Universally, these principles recognise that those on the ground have much more knowledge of their work, fields, and challenges than funders do:

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## 1 Providing unrestricted, multi-year funding

Relying on grantees to determine the best use of their resources demonstrates trust. Unrestricted funding is critical in supporting an organisation's sustainability and effectiveness.

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## 2 Funders do the homework

The footwork and due diligence should be done by the funder before inviting leaders to invest their time and attention—this frees up not-for-profits to concentrate on their mission.

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## 3 Transparent and responsive communication

Open, honest and transparent communications minimise power imbalances and help move the work forward.

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## 4 Solicit and act on feedback

Partner with leaders and organisations whose work models relationships, dialogue, and equity in ways that inspire and inform your own. Regularly solicit, reflect on, and take action on grantees' feedback.

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## 5 Simplify and streamline paperwork

Minimise the digital and paper footprint with grantees. Proposals and reports crafted for other funders are usually satisfactory. Look for ways to consolidate due diligence efforts.

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## 6 Support beyond the cheque

Offer support beyond money: open doors, highlight grantees' leadership and work, be a sounding board and provide spaces for reflection.

## The benefits of trust-based philanthropy

The overarching benefit of this trust-based approach is improved relationships between funders and grantees, which results in more honest conversations and more opportunities for thought partnership and shared problem-solving. TWI also identify distinct benefits for both funders and grantees:

### For Funders

- New insights about the challenges facing not-for-profits
- Less grantee paperwork allows for more time to evaluate the big picture and provide support 'beyond the cheque'
- A deeper sense of connection to the philanthropic mission
- An ability to exercise power more effectively, in a way that better resonates with grantees

### For Grantees

- More time to work on advancing mission-driven outcomes
- Less stress for not-for-profit executive directors and senior management, resulting in greater overall effectiveness
- More opportunities for brainstorming and outcome mapping with funder partners

## The trend towards trust-based practice

TWI's website is full of funder spotlights on grantmakers who have adopted this trust-based philosophy, and what this looks like in their organisation. From new funders, such as Headwaters Foundation in Montana, whose commitment to trust-based philanthropy has led to a number of innovations—including GO! Grants that are designed to be approved in under 24 hours; to older, established foundations, like the General Service Foundation, who have reassessed their grantmaking process and removed many steps that no longer had a purpose.

Adding in trust is a journey for many grantmakers who are adopting some, but not all, of those six steps. "We recognize there are often internal constraints that affect a funder's capacity to fully practice trust-based philanthropy, but even in those cases organisations are learning that they can tailor aspects of this model to strengthen their work," says John Esterle. "Steps can include simply soliciting feedback and being transparent in processes. Some foundations are unable to make the leap to multi-year funding, but can change their project grants into unrestricted grants and assess how that works. Streamlining paperwork is another area we've seen some foundations take steps to practice in a trust-based way—and in doing so realising that it eliminates their own burdens, and they then have more time to work on relationships with their grantees."

In response to the growing demand, The Whitman Institute has teamed up with trust-based leaders at the Robert Sterling Clark Foundation in New York and the Headwaters Foundation in Montana to establish a decentralised network dedicated to spreading the message and lessons of trust-based philanthropy. The Trust-Based Philanthropy Network, currently in its early stages, is designed to incorporate trust-based principles and resources into existing funder convenings, cohorts, and affinity groups. There will also be a hub website that houses a number of resources, expected to launch later this year.

### Learn more

Over the coming years TWI will be developing more resources and a trust-based philanthropy network to support grantmakers.

Visit [thewhitmaninstitute.org](http://thewhitmaninstitute.org) for case studies, resources and to learn more about applying trust-based philanthropy in the context of your organisation.

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The overarching benefit of this trust-based approach is improved relationships between funders and grantees, which results in more honest conversations and more opportunities for thought partnership and shared problem-solving.

I take my kids to the LIBRARY. We sit OUTSIDE because we've got NO WIFI at home... It could be LATE AT NIGHT and we'd be sitting there while he does his HOMEWORK



# Combining forces to amplify voices on digital exclusion

We've come a long way from the early days of dial-up Internet in New Zealand. With the roll-out of ultra-fast and rural broadband, New Zealand is considered one of the most digitally advanced nations in the world. Today, the Internet has become an essential tool for everyday life.

## The divides

Digital divides are the different ways in which people are included or excluded from meaningful use of the Internet and digital technologies. While these divides are shrinking as more people find their way online, the impacts for those who remain excluded is growing, and this is affecting our most vulnerable people and communities. A variety of New Zealand statistics and research highlight that:

- 93% of New Zealanders can use or access the Internet, but only 80% have a home connection. That's roughly one out of 10 New Zealanders being left behind online.<sup>1</sup>

- An estimated 100,000 school-aged children are without Internet access at home.<sup>2</sup>
- 16,000 rural households will not have access to fibre by the time the government supported fibre roll-out is complete.<sup>2</sup>

## Collaboration for change

In 2018, InternetNZ and Vodafone NZ Foundation joined forces to fund research into New Zealand's Digital Divide. While both organisations seek to improve the lives of New Zealanders in different ways, both believe digital inclusion improves social inclusion.

- **Vodafone NZ Foundation** is committed to providing young people with the resources and opportunities they need to thrive. Their goal is to halve the number of excluded and disadvantaged young people in Aotearoa New Zealand by 2027. Digital inclusion plays an important role in supporting that goal.
- **InternetNZ** is the home and guardian of .nz domains. They also help New Zealanders harness the power of the Internet through research, policy and their community programme of \$800,000 each year. They want to see universal access to the Internet for all New Zealanders.

Vanisa Dhuru, Community Manager at InternetNZ says, "Vodafone Foundation approached us with the idea of a project to raise visibility of digitally excluded people in New Zealand, and their experiences. It's a topic close to our hearts, so together we worked on the best approach, and reached out to Marianne Elliott from The Workshop to lead this work."

<sup>1</sup> State of the Internet Survey 2017, InternetNZ.

<sup>2</sup> Pulse of the Nation report, Digital inclusion Research Group report for MBIE and DIA, May 2017.

## Out of the maze

While various other reports have created a baseline for what digital inclusion looks like for New Zealand, *Out of the Maze* takes a qualitative approach to examine what it means to live offline. It explores digital inclusion from the perspective of people and caregivers who have first-hand, lived experiences with access issues.

For both organisations, an important part of the qualitative research method included members of the InternetNZ and Vodafone NZ Foundation teams joining The Workshop at meetings in Ngāio, Kawerau, Mangere, and Westport to listen to the groups considered at risk of missing out on connectivity. These groups included young people (16–24), people with disabilities, migrant and former refugees, Māori and Pasifika, and parents and caregivers of school-aged children.

“We got to meet the people who were being interviewed, and it really enriched our own experiences and gave us an invaluable understanding of how these communities are using the Internet and how it fits into their lives,” says Nicola Brown, Policy Advisor at InternetNZ.

## Research highlights

### 1 Barriers: it's not just about access

The research identified six broad barriers to Internet access. Barriers were different for everybody, with some facing multiple barriers.

1. **Financial** The cost of devices, including adaptive devices for people with disabilities, the cost of getting connected, and ongoing contracts or data plans.
2. **Physical** This was broken into three areas:
  - a. infrastructure and availability
  - b. physical location and accessibility of free Internet services
  - c. accessible devices, platforms, software and websites to suit the needs of users with disabilities.
3. **Motivational** Low motivation and self-esteem undermined motivation to learn new skills, including digital skills.

4. **Trust and safety** Concern about the potential risks or harmful results of being online including physical safety, scams, pranks, and cyberbullying.

5. **Skills** Low levels of literacy were identified as a barrier, rather than specific digital skills.

6. **Capacity** Having the time, energy or resilience to persevere when faced with technical difficulties, or to keep up with new forms of communication and digital platforms.



### 2 Harming the most vulnerable

The effects of digital exclusion are impacting some of our most vulnerable people. The research showed that:

- **Digital exclusion is not static**  
People are most vulnerable during transition points, with examples including when leaving an abusive relationship or moving out of home.
- For a small number of people, removing specific barriers to digital access may be sufficient. However, overall the research pointed to a need to **remove broader social and economic barriers**, to create more conducive conditions for interventions to increase digital inclusion.

### 3 Co-design

A common theme in all the research was the need to consult with excluded people, and to work in partnership with trusted community groups to build capacity to solve their own problems.

“We need to value the voices of those with lived experience, or we risk further imbedding social and digital inequalities, and creating solutions that don’t adequately remove barriers to participation,” says Lani Evans, Foundation Manager at Vodafone NZ Foundation. “Co-design, community-centred solutions and participatory practice can help us do this well.”

## Next steps

*Out of the Maze* provided participant-sourced solutions aimed at various sectors, including funders. Three takeaways specific to funders included:

- Funding free Wi-Fi, devices and—where needed—training to groups and communities facing economic and other barriers to digital inclusion.
- Funding the creation of custom-made mobile digital access portals specially designed to ensure that people in times of transition or heightened need can access ‘essential services’ to communicate with friends and family.
- Funding safe, welcoming spaces where people can access digital devices and services, and develop the skills, motivation and confidence to use them.

“Through this report we hope that more grantmakers will recognise the significance of digital divides in NZ and the impact that digital exclusion can have in terms of isolation, powerlessness and limited opportunities,” says Lani.

The research and collaboration has changed the way InternetNZ is thinking about its future research and funding too. “This collaboration was such a positive experience. We need to know what other funders are doing in this space and we are open to more collaboration,” says Vanisa. “Collaboration fits with our whakataukī, that was gifted to us too: ‘Kua raranga tahi tātou he whāriki ipurangi mo āpōpō’: together we weave the map, in terms of the Internet, for future generations. To make progress on this issue, we need to be weaving this map together, as we can’t continue to let Kiwis facing digital exclusion slip through the net.”

## More information

Read the report at: [report.digitaldivides.nz](https://report.digitaldivides.nz)

# Driving social change through investment



## A growing field of investment which is capturing the attention of mainstream investors is impact investing.

In the past, responsible or ethical investing focussed on avoiding investments that have a negative impact on society or our environment. Impact investing goes a step further by investing into organisations, projects or funds with the intention of generating measurable social and environmental outcomes, in addition to a financial return.

In simple terms, impact investing is putting your money to work in a way that helps to achieve positive benefits for society.

For many years, philanthropy and investing have been thought of as separate disciplines—one championing social change, the other financial gain. The idea that the two approaches could be integrated—in essence, delivering a financial return while doing good—is a relatively new concept.

The continuum of responsible and ethical investing developed by the Responsible Investment Association Australasia helps put the different types of investing into context. Traditional investments, with limited or no regard for environmental, social and governance (ESG) factors, sit at one end,

and at the other end is philanthropy which targets positive social and environmental impact with no financial return.

Impact investing sits at the philanthropic end of the spectrum, but is different from philanthropy because a financial return is expected. It's different from mainstream finance because measurable social and environmental benefits are sought. The intention to generate a 'positive' social or environmental impact also distinguishes the practice from the 'negative screening' used in socially responsible investing.

Impact investing came about in response to a growing awareness that the challenges facing society are too large and complex to be solved by governments, philanthropy and not-for-profit organisations alone. Impact investment can play a key role in addressing these challenges.

### How do impact investments perform financially relative to other investments?

Many investors assume that this type of investment means they will make a lower financial return, or that returns are 'sacrificed' in order to have impact. Other investors reject the trade-off between social impact and financial return, and expect a market rate return while delivering the intended impact. Positive impact does not always mean lower returns, and in practice impact investing covers

the spectrum—from below-market returns to market-beating performance.

For investors, impact investing provides greater choice and opportunities to put capital to use in ways that make a financial return and align with their values. It encompasses a diverse range of investment opportunities—for example, investment in community infrastructure, sustainable forestry, or clean technology—and a growing list of activities, including renewable energy, conservation, microfinance, and access to affordable housing and education. Each has a different balance of risk, return and social impact, as well as investor expectations.

Impact investing is here to stay and can be seen as a key driver for positive change. It challenges the long-held view that social and environmental issues should be addressed only by philanthropic donations, and that market investments should focus exclusively on achieving financial returns. It has particular appeal for younger generations, such as millennials, who want to give back to society, and is a trend which is set to grow as these investors gain more influence in the market.

#### Article by

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### RIAA's responsible and ethical investment spectrum

Traditional investment	Responsible and ethical investment					Philanthropy	
	ESG integration (including shareholder engagement and voting)	Negative screening (industry sectors or companies excluded)	Positive or best-in-class screening (target companies with better ESG performance)	Thematic/ sustainability themed investments	Impact investing (target social and environmental impact)		
No regard for environmental, social and governance factors					Market rate	Concessionary rate	Grants to social and environmental impact. No financial return
Impact intention	Avoids harm		Benefits stakeholders			Contributes to solutions	
Agnostic							



## From the Chair

**In December, Ken Whitney was elected as the new Chair of Philanthropy New Zealand.**

**A born-and-bred Aucklander, Ken was a lawyer for over 30 years before retiring to set up a private trust and superannuation fund management company. He was a trustee of Foundation North for over seven years and recently retired as Chair. At the other end of the grantmaking scale, he is also a trustee of family trust, the Chisholm Whitney Charitable Trust, as well as the Auckland Foundation and the Auckland Health Foundation.**

**In line with the Philanthropy Summit 2019 theme of the Future of Trust, Ken shares his insights into the future of philanthropy and the things he is most looking forward to in his new role as Chair.**

Philanthropy is an exciting place to be in contemporary Aotearoa New Zealand. I am immensely pleased to have taken on the role of Chair of Philanthropy New Zealand, which has an important role to play in promoting a thoughtfully generous Aotearoa.

Philanthropists are uniquely placed to think profoundly about a long-term vision for the kind of country we want to be, based on a deep understanding of communities and the issues that challenge them. Philanthropy is all

about enabling and empowering people to make a difference whether at a neighbourhood level, right up to whole system changes. It is an extraordinarily broad canvas and one whose boundaries are not fixed or limited.

In recent years, philanthropy has moved from a palliative approach to thinking more broadly about causes and outcomes, digging deeper into entrenched failings and seeking to understand the root causes of the issues we continue to face. Creative new initiatives are being developed, applied and evaluated everywhere to find better and sustainable solutions. A growing body of research and evidence-based approaches is informing this work, and it is a key role of Philanthropy New Zealand to help disseminate these resources through our special interest groups, biennial conference and the new member hub on our website.

Another emerging trend, which I am proud of, is the leading role philanthropy is playing in engaging more meaningfully with Māori. I believe we have a great opportunity to demonstrate how a genuine Treaty-based relationship can work positively to address social and environmental issues for the benefit of all New Zealanders, and also dispel many of the myths and fears that can too often hinder progress. I am

pleased that our conference planning team is aiming to take the lead by weaving Te Āo Māori through our conference sessions in May. Our theme is 'The Future of Trust' because trust is at the heart of philanthropy, and indeed civil society, with its essential elements of inclusiveness, responsibility and fairness.

Traditionally philanthropy in New Zealand has been somewhat fragmented, which can lead to limited impact. Encouraging collaboration within a well-thought-out strategic vision would enable us to lift our sights and achieve something of far greater scale and effect. Facilitating this kind of collaboration is something which Philanthropy New Zealand is well placed to offer and which we will be focussing on in the near future.

We are lucky that Aotearoa New Zealand is a small country with few layers of government and a well-connected, well-educated and engaged population. I believe passionately that we have it within our power to solve many of the serious social and environmental issues that confront us if we marshal our collective resources with determination and vision. I have no doubt that the philanthropic sector is up to the challenge, and I look forward to working with you to support the vital contribution the philanthropic sector makes to the well-being of our nation.



# Philanthropy New Zealand

*Tōpūtanga Tuku Aroha o Aotearoa*

## **Philanthropy New Zealand is the hub of philanthropy in Aotearoa New Zealand.**

We provide thought leadership and practical help for everyone with an interest in giving to make the world a better place. Our members include private philanthropists; family, community and corporate foundations; and iwi and community trusts.

We also have a community membership category for not-for-profit organisations that deliver services into the community.

### **Join now**

To become a grantmaker, individual or community member or to find out more, go to [www.giving.org.nz](http://www.giving.org.nz)

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