Philanthropy News

Nine conversations to be part of

What’s your role?

Women Give
New Zealand’s first fund inspired by women’s giving

Guidelines for good
We launch the Transparency Guidelines for funders

What makes next gen donors tick?
A Q&A with Michael Moody
From the Chief Executive

Kia ora koutou

Welcome to the latest issue of Philanthropy News. Our cover story is an exploration of the crucial conversations Philanthropy New Zealand is hearing across our sector locally and internationally. The conversations look at nine areas where we see philanthropy and grantmaking growing, pushing the boundaries and facing our biggest challenges. There are no simple answers to any of them, and our success will be measured not so much by any solutions we come up with, but our willingness to engage, create and innovate as a sector in response.

We are delighted to launch the final version of Philanthropy New Zealand’s Transparency Guidelines in this issue. I’d like to thank again the architects of this important resource: Kate Frykberg, Lani Evans and Katy Love. The power of these guidelines is not so much as a prescriptive list of dos and don’ts, but in the way they help us think about big issues: accountability to our communities, making our processes easier for fundseekers, and being clear about our values and strategy.

We also look at funding of the arts in Aotearoa New Zealand, and there’s plenty of news from the sector. A highlight for me is the work Dellwyn Stuart (Auckland Foundation) is doing to lead the establishment of New Zealand’s first women’s fund — an important initiative that reminds us of the power of using equity and justice ‘lenses’ to guide our giving. It’s another good example of some of the innovation coming out of New Zealand’s growing community foundation movement.

Enjoy the read!

Ngā mihi mahana

Tony Paine
Members Survey

Thanks to everyone who completed Philanthropy New Zealand’s members survey in September. It was great to see what our members value most, such as the Philanthropy Summit, funder networks, Giving Matters e-newsletter and this magazine, Philanthropy News. Although feedback was generally very positive and endorsed our direction of travel, we’re keen to do more to get our value proposition right. That includes looking at membership fees, and what more we can do to help build a stronger sector.

Impact Investing Network

Philanthropy New Zealand has been chairing a working party to establish an Impact Investing Network in New Zealand. The Network is free and a great opportunity for philanthropics and grantmakers to join New Zealand’s growing ecosystem of impact investors, intermediaries and investment opportunities. The Network will be of particular interest to philanthropics who want to find new ways of creating social and environmental value through more closely aligning their investing activities with the aims of their grantmaking. Among the resources are case studies showing ways grantmakers have successfully used Impact Investing.

A critical next step in growing impact investing in New Zealand is the establishment of a National Advisory Board. By joining the Network you will have a chance to comment on the terms of reference and selection process for the Board.

We encourage you to join the Network, participate in sharing what’s happening around New Zealand and the globe, and take advantage of this connection with your peers and colleagues.

Please see impactinvestingnetwork.nz

MOU with Community Foundations

Philanthropy New Zealand is delighted to have developed a MOU with Community Foundations of New Zealand.

We will support their work promoting the community foundation model and ensuring that the grantmaking managed by community foundations continues to be an exemplar of thoughtful, grassroots generosity.

Read more at bit.ly/CommunityMOU

Arts Foundation Awards

The Arts Foundation annual New Zealand Arts Awards took place in Auckland last month. The event celebrated the nation’s high calibre of artists and their achievements with 15 awards.

Read more at bit.ly/ArtAwardsNZ

Arts Award Recipients: Roberta Thornley, Tiffany Singh, Carl Nixon, Rob Ruha, Dame Robin White, Donovan Bixley, Hera Lindsay Bird, Niki Caro

UPCOMING EVENTS 2018

February

Wed 28 Business Giving Network Event, Auckland

March

Tue 6 Women Give, Auckland
Thu 29 Arts Funders Convening, Wellington

April

Wed 11 & Thu 12 Network Symposium, Auckland

May

Tue 15 Two Sides of the Same Coin, Auckland
Thu 17 Two Sides of the Same Coin, Wellington
Tue 22 Two Sides of the Same Coin, Christchurch

June

Tue 12 & Wed 13 Great Grantmaking, Wellington

Please see philanthropy.org.nz/events for more information and registration.
Tech Support

Innovative ways members are engaging tech to build stronger communities and benefit conservation.

Baby Talk
The NEXT Foundation has helped fund a new initiative with Talking Matters — a community campaign aiming to grow confident young listeners and speakers. As it’s been proven that more interaction and talk with babies hugely benefits their cognitive development, the NEXT Foundation has funded LENA language recording devices to help encourage communication at home. Like a pedometer for talking, the LENA device is worn by a baby or young child to monitor verbal exchange between them and their parent/caregiver over a whole day once a week. Parents get the data back in easily understood graphs. Small groups of parents meet together weekly with a coach to discuss the results and explore strategies and opportunities for talking more and differently with their children. Early results show that parents find it very empowering to have the data themselves and that they are changing when and how they talk at home.

Read more at bit.ly/TalkingMattersNZ

Reality Bytes
In October, the Vodafone New Zealand Foundation launched the inaugural Accelerator Change Programme as part of a ten-year strategy to halve the number of disadvantaged young people in Aotearoa.

Five community organisations from around the country were selected to take part in the programme which supported them to take a technology-based game-changing idea from concept to reality, using technology from the Vodafone xone Innovation Lab.

Read more at bit.ly/VodafoneAccelerator

Conservation Innovation
A winner at the recent WWF-New Zealand’s 2017 Conservation Innovation Awards, Water Action Initiative New Zealand (WAI NZ) is developing a real-time water-borne E. coli contamination sensor that will give community members, regional councils and government a tool to monitor freshwater in real-time, providing immediate detection of increased E. coli levels so that swifter action, including early health warnings, can be taken. WAI NZ received a $25,000 Awards grant to fast-track their idea from concept to development, to maximise impact for conservation.

Read more at bit.ly/ConservationInnovation
The Awards are part funded by The Tindall Foundation and Department of Conservation

Sparking Generosity
Spark have married their core business of communications with their desire to give to and help build stronger communities yet again with the programme, Spark Jump. The programme is helping solve the Digital Divide, by ensuring children have digital access both at school and in the home. The scheme offers 30GB of data for just $10 and a modem at no cost. The pre-paid offer means there’s no contract or credit check required and families have the added flexibility of topping up as they go.

Many of Spark’s own staff love the initiative and are gifting $10 per month via payroll giving to sponsor a family’s digital connection…and the giving just keeps getting better, as part of the programme the Spark Foundation match payroll giving donations and double the generosity.

Read more at bit.ly/SparkJump

Recent Appointments

Congratulations to new appointments in the sector

Gavin Murphy was recently appointed as Chief Executive of the Eastland Community Trust in September.

Georgie Ferrari returned to her hometown of Wellington after over a decade of working with youth in Australia to take up the appointment of Chief Executive of the Wellington Community Trust.

Jackie Flutey has been appointed as General Manager of the Community Trust of Southland.

Leighton Evans has moved from Gisborne and the Eastland Community Trust to Christchurch where he takes the lead at the Rātā Foundation.

Lisa Tumahai has been elected Ngāi Tahu’s kaiwhakahaere — the first wāhine in the role.

Louise Aitken was appointed Chief Executive of the Ākina Foundation. Louise was previously the General Manager of the Foundation.

Michael White has been appointed Chief Executive of Inclusive New Zealand after a decade as a Legal Adviser at the New Zealand Human Rights Commission.
Generous living

With an ear for the doorbell and care for the underdog, philanthropists Murray and Sue Jones have given millions to support the less fortunate in New Zealand and abroad. We spoke to Murray about how and why they give.

For business owner, philanthropist and volunteer Murray Jones, the act of giving started at a young age. Growing up in north-west Auckland in a church-going family with a mum "who always looked out for the underdog", one of his earliest memories was collecting for CORSO as a "wee fellow". An experience in which he says he witnessed that the poorest were the most generous while the wealthy tended not to hear the doorbell.

It is clear those early memories made a lasting impact. After moving to Christchurch in 1976, and later setting up the successful company, Dove Electronics in 1984, he was all ears for the doorbell and established the Dove Charitable Trust. As the company has grown, so have the funds the Trust distributes — with a giving total to date of around $15 million. He says the initial goals behind the Trust were essentially Christian but they have since evolved significantly to “where support for conventional religion has no part unless the recipient organisation is actively involved in the community and poverty alleviation”.

Today, Murray says their grants are focussed mainly on smaller community groups around New Zealand with a few exceptions such as Amnesty International and the Christchurch City Mission. He says there is also a significant chunk going to charitable efforts focussed on women and children in the Pacific region. A region he says “is difficult to fundraise for, difficult to make change happen, and on our doorstep.”

Dove Charitable Trust’s grants are decided by their three Trustees, who Murray says operate on the base criteria of caring for the underdog, and that all recipients are working toward a fairer society. “Without paid staff, we also rely on our relationships with grant recipients, many of which we have developed over the years,” he says.

It’s safe to say Murray has learned a thing or two about good philanthropy. He says, “You’re not out to create dependants and you don’t want people to bow in your honour at your passing. For me, I want people to preserve their dignity and self-esteem while helping, and it sometimes seems to be a tricky balance.” He says being philanthropic is a necessity in New Zealand, “the rich getting richer and the poor getting poorer is a very unhealthy trend. I wish to see that trend reversed, and one way to achieve that is for those with money to help those at the other end of spectrum.”

Along with grantmaking, managing funds, and sitting on the Philanthropy New Zealand board, Murray volunteers across a number of organisations. He is part of the Community Justice Panel and where recommended, he and his wife volunteer as mentors to young offenders. Another group, which he chairs, is the Book Discussion Scheme, a nationwide not-for-profit organisation which runs around 1400 book groups across the country. The focus is a strong social agenda which utilises the many benefits of reading to encourage interaction and understanding, especially in parts of society where reading isn’t so strong. One such group is at a women’s prison, where he joins the Chaplain to host a book club. Murray feels taking part and walking alongside those you are wanting to assist is hugely important, “It’s always been a mantra of mine that we can’t expect to understand, let alone help, those around us if we don’t get among them.”

“[We] operate on the base criteria of caring for the underdog, and that all recipients are working toward a fairer society.”
A New Zealand first

In a country celebrated for women’s leadership and where women were first to win the vote, it’s surprising to find a shortage of philanthropic funds by women, for women. Dellwyn Stuart of the Auckland Foundation is seeking to change that by establishing the first New Zealand Women’s Fund.

She proposes a collective impact model, in which 100 donors will build a fund to fulfil a range of community-focussed initiatives concerning women. We spoke with Dellwyn about what a women’s fund actually is, why it matters right now, and where she sees the fund heading in the future.

“A women’s fund is a community of interest,” says Dellwyn. “This fund will be a community of people focussed to create an impact on issues surrounding women.”

Dellwyn says the idea of establishing New Zealand’s first women’s fund came about after many conversations about generosity and the recurring theme that women are often more generous in their decisions around giving.

“I thought, ‘Well — that’s interesting. If women are more generous, are women more involved in this decision around giving? If they are, are there particular differences in the way they approach their generosity?’”

Research yielded no answers to these questions in New Zealand, so Dellwyn looked to the States for data.

“One study showed that baby boomer and older women gave 89% more to charity than men their age.”

Around women’s giving and women’s generosity. Her research opened up a window on a whole world of women’s funds, including Dallas Women’s Foundation, Central Ohio Women’s Fund, and the Chicago Women’s Foundation, all of which have been operating for over 20–30 years.

“There are about 150 around the world,” says Dellwyn, “all created out of community foundations because the community foundation model offers huge efficiencies in administration cost and effort, which is what people tend to want when pooling funds to make a big impact.”

Women’s funds around the world offered insight into women’s giving and provided access to further research. One study showed that baby boomer and older women gave 89% more to charity than men their age. Another suggested women are more likely to see money as a means to achieve goals and a way to create personal security, while men tend to want to be motivated to support their families and support the status quo.

This isn’t a negative observation — it’s a simple matter of different motivations, and this explains why a women’s fund makes perfect sense, as it provides support for an area that might otherwise be overlooked.

“Research shows women are much more motivated by empathy. When they can relate to a circumstance or an experience, they tend to be focussed on how to help people change things and how to help those who are struggling with a challenge,” Dellwyn explains. They also tend to give to other women and girls because of that strong empathy driver. They want to give to things that they relate to.

“I think there are some contextual things that have been happening in the last 12 months too, with the election of Trump and the women’s marches across the world — there’s a re-energising of the women’s movement.”

The fund’s participatory model reflects the idea of a collective or a movement, in which everyone is involved to make change or face a challenge. Whether donors wish to commit to monthly payment options or a one-off donation, all will get to decide upon where and how the resources are put to use.

“They’ll come together, explore the issues facing women, meet some of the groups involved and make a decision about where that gift goes,” says Dellwyn.

“Many of the overseas women’s funds explored in the research have tended to focus the gifts around the central idea of ‘if a woman is economically independent, then she can weather more storms’.” Variables that determine economic independence are things like prevention of domestic and sexual violence, pay equity, access to health care and safe housing,” says Dellwyn.

“So to help achieve that, there will also be an aspect of promoting and supporting access to education that will help vulnerable girls and women overcome barriers and ensure that they have the chance to live the lives they want to live.”

While taking cues from international research and similar funds from across the globe, Dellwyn acknowledges that the New Zealand model will be unique to us. “While women’s funds are a movement of collective giving, they all have their own structures.” It’s a different environment here in New Zealand than say the US. We do have wonderful institutions like the Māori Women’s Welfare League and the National Council of Women that are active in the advocacy space.

“I’m not so much seeing the
Women’s Fund as being in that advocacy space, rather being a channel for women’s generosity to each other, applying a gender lens to giving and saying “When I give, how does my giving affect girls and women?”

Since the idea of the fund was publicly mooted in July, it’s been met with interest and enthusiasm around its potential. “To be honest,” Dellwyn happily admits, “the interest is more than I anticipated.”

That interest, Dellwyn believes, represents a desire to do something, to make a contribution towards change. “Whether you’ve got $50,000 or $5 to donate, it’s a way to contribute to help another woman or another girl.”

And although the focus of the Women’s Fund is female, it’s not exclusively for women. There has been significant interest from men and organisations about how they might get involved and contribute as well. “I guess that reflects on the fact that many men have daughters,” Dellwyn says. “They look at, say, pay equity issues or the number of women CEOs and think, ‘Is this the world I want my daughter to grow up in?’”

Now that the fund has been socialised, Dellwyn says the Auckland Foundation’s role is enabling people to join, come together and start canvassing issues they want to impact. Following that, she anticipates that the Women’s Fund will likely be in a position to set up an endowment fund and make its first substantial grant before the end of 2018.

“All donations will be split 50/50, with half going into endowment and the other half granted each year. Donors will get the satisfaction of knowing they’re helping women today as well as contributing to a fund that will endure to create opportunities and meet challenges in the future.”

To establish the donors, Dellwyn has organised a series of events aimed at raising awareness of women’s generosity, including a one-day summit as well as contributing to a fund that will endure to create opportunities and meet challenges in the future.”

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in March, Women Give 2018. It will focus on what is unique about women’s giving, review the role of women philanthropists of different ages, and talk about the different ways women like to give collectively.

For more information on the Women’s Fund, visit aucklandfoundation.co.nz/womens-fund

Event: Women Give 2018 | Tuesday 6 March, 2018 | Auckland
Philanthropy New Zealand is proud to be supporting this event.
Nine conversations to be part of...

There are at least nine conversations that Philanthropy New Zealand sees happening internationally and locally as philanthropists and grantmakers think about the challenges of doing more and doing better. What's your take on these crucial conversations?

Philanthropy New Zealand CE Tony Paine and Relationships and Events Manager Yvonne Trask present these in summary here, with an invitation to consider how you are participating and what else you might contribute to these developing features of our landscape.

1. Transformation

Grantmakers are increasingly focussed on tackling the causes as well as the symptoms of social and environmental challenges. Figuring out how to be part of the fence at the top of the cliff as well as the ambulance at the bottom is a critical challenge as we seek to respond to the big ‘wicked’ problems of our age: climate change, poverty, inequality, exclusion, violence, and environmental degradation.

2. The power of venture philanthropy

We have enormous freedom to invest in innovative ideas to tackle social issues. We can take the risks needed to help start and test responses to social need. Some in the sector are suggesting that we need to learn from venture capital as we invest. We’re also recognising the need to enlist the support of other funders, including government, to pick up initiatives that we have helped pilot, bringing them to sustainability and scale.

3. High engagement

We are only as good as the organisations and movements we support. Everything philanthropy funds is implemented by others, so we have a vested interest in helping those groups be the best they can be. High engagement takes us beyond cheque book approaches (‘send the money and leave them to it’) to much more relational, hands-on approaches designed to help organisations become ‘investment ready’ and build capability to deliver.
Participation, transparency and power

For grantseekers, it can seem like funders have all the power. An unequal relationship is inconsistent with our values and creates barriers to crucial conversations about success. Grant recipients may fear that being open about ‘failure’ will lead to a loss of funding. Involving recipients and communities more meaningfully in our work is one solution. We are seeing communities invited to help in funder strategy development and we are seeing recipients participating in funding decision-making. New approaches to accountability — like the transparency movement and round-table reporting — are being tested as we think more about using our power with responsibility and humility.

Aligning investment with mission: impact investing

There is growing evidence that investment activities can be an effective tool for achieving our mission alongside grantmaking. Globally, the scale of impact investing has seen a huge growth in capital that targets social and/or environmental outcomes alongside financial returns. In New Zealand, the uptake in this type of investment by trusts and foundations is increasing but it is still small scale. In our search for sustainable solutions, impact investing can’t be ignored.

Diversity

Philanthropy and grantmaking cannot yet claim that we look like the communities we seek to serve. We are only now starting to hear the leadership, wisdom, and contributions of young people, people with disabilities, people from lower socio-economic communities, Māori, Pasifika, and people from migrant communities. Just as importantly, how can we go from diversity (‘counting heads’) to inclusion (‘heads that count’)? It’s one thing to have, for example, a young person sitting at the board table, another to ensure their contribution is supported, valued, and equal.

Relationships with Mana Whenua

Some grantmakers are responding to the compelling evidence that the system is failing Māori in areas like health, justice, and education. We can focus on powerful examples of Māori self-determination and community development. Research and experience show a rich cultural life and sense of belonging are turning around negative outcomes for whānau, hapū and iwi. The challenge for grantmakers is not to ignore the negative statistics but to use them to inspire relationship building and grantmaking that seeks to give further life to the Treaty guarantee of Māori control of the things they value.

Funder burden and sustainability

Are we eroding or contributing to sustainability? Questions like this are leading grantmakers to consider how their processes impose direct costs on grantseekers, and to simplify and right-size (relative to the size of the grant) application and reporting processes. Two step application systems, single gateways to multiple funders, common application forms and accreditation processes are all on the agenda. Also in play are:

- Multi-year grants
- Unrestricted contributions to trusted organisations
- Reflecting on our expectations about when and how organisations might be able to operate without our support
- Paying what it takes — including a fair share of overheads and/or funding an entire project.

This could help break the cycle of grantseekers routinely asking for more than they need because they expect us to only part fund.

Three growth trends for giving in New Zealand

a. In the next 30 to 40 years, $US30 trillion in financial and non-financial assets is expected to pass from the baby boomers to their heirs in North America alone. This trend will be echoed here and underscores the importance of our work engaging with young people.

b. Community foundations are closing in on nationwide coverage, and experience internationally suggests that funds under management and distributions will scale-up significantly.

c. Corporate giving will continue to rise as the focus on community, meaning, and contribution goes well beyond social enterprise to all parts of the business world.
The real value of art

Building stronger communities and improving well-being through arts funding.

You won’t find many in the philanthropy and not-for-profit sector who would disagree that art and creativity are fundamental in building a healthier society. In fact, across society this view is supported, and here in Aotearoa New Zealand research from Creative New Zealand (2014) shows 82% believe that the arts help improve society; 86% say they learn about different cultures through the arts; 88% that the arts are good for you; 90% of New Zealanders are engaging in the arts and 74% of New Zealanders believe art contributes positively to our economy. Further afield, the Community Development Investment Review (Federal Reserve Bank of San Francisco) has demonstrated that creativity can encourage civic engagement, build resiliency and contribute to quality of life. More and more studies are highlighting the positive outcomes that art and creativity can have on community and well-being.

It’s heartening to see that artists and art groups across the country who focus on such outcomes are getting support from those who recognise that the value of art is well beyond a price tag and that engagement with art and artmaking processes is vital in achieving them.

And it’s even more heartening to see that many artists and art projects are funded in part or fully by Philanthropy New Zealand members. In this article, we highlight two examples of arts funding that are making a positive impact.

Arts Foundation Art Awards

Since 2000, the Arts Foundation has donated over $6 million to New Zealand artists through no-strings-attached monetary awards. The recipients represent a broad spectrum of artistic practices: classical music, popular music, film, theatre, contemporary dance, poetry, photography and illustration.

Artists do not apply for the awards, they are selected by a panel independent of Arts Foundation staff and governance. The recipients are then called out of the blue with the news they have been selected.

“The purpose of the Arts Awards is to assist artists to continue their extraordinary practice to create experiences for us to share and to celebrate artistic achievement in front of the nation,” says Arts Foundation Executive Director, Simon Bowden.

“The Foundation is also increasingly recognising the instrumental value of the arts in society and the role artists are playing in health and well-being, community and social development, political and economic development, entrepreneurial endeavour, scientific discovery and other frontiers that make the world a better place.”

Simon says that in his role he has been fortunate to witness the artist’s creative process and achievements which has provided him “with first-hand experience of how the arts work on many levels in society and are often actively engaged with big issues of our time.”

One example is interdisciplinary artist Tiffany Singh, who received an Arts Foundation New Generation Award (a gift of $25,000) at this year’s ceremony. Tiffany often refers to her work as ‘a tool for social change’. Her practice explores the relationship between engagement in arts, culture and subjective well-being. One of her works, Fly Me Up to Where You Are is a high-engagement project which took her into low decile schools across New Zealand. She worked with students to take their ideas, hopes and dreams for the future and turn them into visual language. She assisted the children to transfer their statements to 15,000 Tibetan flags. The flags were flown in groups around the country, and then finally all together in Wellington for the...
New Zealand Festival. The project received an award in 2013 from the Human Rights Commission for bringing together diverse communities.

“It was a transformational work across education, open discussion, well-being and community integration,” says Simon, “the collaborative process connected participants with their ability to be creative, an essential outcome for learning.”

And it appears there will be many more transformational works to come from Tiffany’s practice. In recognition of the Arts Award, she told media, “This will allow me to focus on my major inquiry into the relationship between arts, health and well-being.”

Rātā Foundation and SCAPE Public Art

Art bringing communities together and building resilience has been witnessed on a big scale in post-quake Christchurch, and it is a move that Christchurch-based Rātā Foundation wholly supports. One of the projects they’ve long supported is SCAPE Public Art which, for 19 years, has been instrumental in strengthening community and cultural engagement through the installation of world-class contemporary artwork across the urban centre. It also runs an arts programme every spring which includes talks, education workshops and walking tours. In the more recent, post-quake times, SCAPE’s installations and programmes have played a big part in bringing confidence, culture and vibrancy back into the city centre.

“SCAPE is among the arts initiatives we’ve funded that have significantly aided the re-build of the City’s social and cultural fabric as well as acting as a signal that the City was back up and running,” says Leighton Evans, Chief Executive of the Rātā Foundation, Arts Centre, Canterbury Museum and Christchurch Art Gallery, in which the history and presence of Pacific Island culture was explored.

“But over the six-week season, ‘ARE PASIFIKA encouraged Pasifika communities and others to return to the central city, sharing the knowledge and experience of their cultures and history, and strengthening their identity and sense of belonging in Ōtautahi-Christchurch.”

which funded over $1.7 million to arts and heritage in the last financial year.

The Foundation, which supports SCAPE annually in its funding round has focussed its support on capacity and capability building to help creativity and communities thrive. And when you refer to the art organisation’s signature, Ka tipu te whaihanga / Creativity will strengthen, it is a mantra that this long-running programme has promised and delivered.

SCAPE’s Executive Director Deborah McCormick says, “Rātā Foundation’s funding has enabled us to undertake projects we believe are genuinely strengthening communities. A great example is ‘ARE PASIFIKA (House Pasifika), a community collaborative arts project which was part of SCAPE Season 2017 Time in Space (territories and flow).”

The community project included workshops and activities including making Lei and body adornment, as well as experimental theatre, performance, Polynesian drumming, and a tour with organiser and artist Nina Oberg Humphries through the central city, sharing the knowledge and experience of their cultures and history, and strengthening their identity and sense of belonging in Ōtautahi-Christchurch,” says Deborah.

Reflecting on the season, Deborah said that the workshops and other activities in the Arts Centre, SCAPE’s Learning Zone and various central city locations (supported by Rātā and others) enabled thousands of children and adults to participate in this year’s programme.

Leighton says the Foundation’s decision to fund such arts initiatives is based on decades of research that points to the powerful contribution of arts to our health and well-being.

“The arts can keep us well, aid recovery and support longer lives. We are seeing this among the groups we fund, in the area of arts education, evidence emerging that suggests arts have an impact on everything, from overall academic achievement to social and emotional development and so much more.”


Funding arts?

Join us at Arts Funders Convening, Wellington, 29 March 2018

At the request of our members, Philanthropy New Zealand will be convening the arts funders of New Zealand to gauge the needs of the sector.

For more information and registration, please visit philanthropy.org.nz/events
Guidelines for good

In philanthropy and grantmaking, being transparent simply means being open and honest about what we do and how we work so we can clearly show how we are serving the public good.

Transparency Guidelines for funders in Aotearoa New Zealand

A funder using these Guidelines agrees that the following information will be publicly available:

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<th>Expected good practice for all funders</th>
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Appendix one

Definitions and criteria

General information

Contact information: Are the following points of contact provided: telephone number, email/online contact form, and mailing address?

Vision / mission / purpose statement: Is a mission or purpose statement available?

Key staff list: Are the names of executives and programme staff available?

Key staff biographies: Are biographies of executives and programme staff available?

Board member details: Is a list of board members with biographies and affiliations available?

Governance and policies

Trust deed / bylaws: Are the foundation’s governing trust deed and other bylaws available?

Committee terms of reference: Are the foundation’s committee terms of reference or charters available?

Code of ethics / conduct: Are policies guiding foundation staff ethics or conduct available, and do they include a procedure for reporting non-compliance?

Conflict of interest policies: Is the conflict of interest policy available?

Board appointment process: Does the foundation clearly specify the process for selecting and appointing board members and does the foundation make available policies around what remuneration (if any) is paid?

Staffing policies and diversity data

Whistle-blower procedures: Is a policy regarding the reporting of financial improprieties or other misconduct available?

Executive compensation process: Is the process used to determine executive compensation described?

Commitment to the Treaty of Waitangi: Does the foundation provide information about its commitment to the Treaty of Waitangi?

Diversity data: Is statistical information provided about the demographics of the foundation’s workforce and board leadership?

Grantmaking information

Grantmaking process: Is there a description provided explaining how the foundation selects its grantees (application process or pre-selection)?

Grantmaking strategy / criteria: Are the foundation’s grantmaking priorities, criteria or strategy outlined?

List or database of past grants: Is there a searchable database of past grants or a grants list categorised by programme area? (Note: A grants list is accepted for foundations with fewer than 200 grants per year. A grants list should include — subject to any confidentiality requirements — recipient name, grant amount, and recipient location information.)

Performance measurement

Assessment of overall foundation performance: Is there a comprehensive assessment of overall foundation performance and effectiveness that measures progress toward institutional mission and goals?

Knowledge centre: Is there a centralised section of the foundation’s website that provides a collection of the foundation’s research, programme evaluations and ‘lessons learned’ reports?

Grantee feedback mechanism: Is there an online mechanism in place so that grantees can regularly provide the foundation with feedback?

Grantee surveys: Has the foundation conducted a periodic survey of its grantees and shared the results publicly?

Strategic plan: Is information readily available that explains how the foundation defines its overall strategy, direction and priority setting?

Financial information

Financial statements: Are the most recent financial statements, compliant with applicable financial reporting standards, available? (Audited for all larger foundations.)

Financial metrics: Does the foundation make key metrics available, particularly grants as a % of capital and operating expenses as a % of total expenses? Also % of applications fully funded, part-funded, declined?

Investment policies: Are policy statements about how the foundation invests its endowment provided?

We invite funders to endorse these guidelines, and hope that all foundations, trusts, and grantmakers will agree to use the framework to guide their approach to transparency.

These guidelines and a self-assessment template are available from philanthropy.org.nz/transparency-guidelines
What makes next gen donors tick?


1. What is *Generation Impact: How Next Gen Donors Are Revolutionizing Giving* about, what motivated you to write it, and why now?

*Generation Impact* is about the most significant philanthropists ever. That’s a bold statement, but my co-author Sharna Goldseker and I believe it’s warranted. The major donors emerging from the Gen X and Millennial generations will have more financial resources to give than any previous generations, and they have big ideas about how to use those financial resources to create real impact in the world. This historic financial largesse comes from both new fortunes created by younger entrepreneurs and an unprecedented transfer of wealth from older generations.

But these “next gen donors” are “most significant” for reasons beyond just their money. They also want to give throughout their lifetimes, to give more than just money, and most important, to give in fundamentally new ways. They want to revolutionise how big donors try to effect change, embracing many of the innovations and experimental new methods that are already starting to shake up the philanthropic world. This book lays out the plans of next gen major donors and talks about what the coming philanthropic revolution means for all of us — wherever we sit around the philanthropic table.

Given how central these donors will be to philanthropy in the future, and across the globe, I felt we needed to know much more about them and had to write this book now!

2. What were your main methods of research and were there any outcomes that you found particularly surprising?

The book is based on data collected over many years from 20–30 year old donors with the capacity for major giving — capacity coming from their own wealth, from inherited wealth, or through their role in a family-giving vehicle.

I think many readers will be surprised by the portrait of these donors that emerges in the book, especially given the somewhat negative depiction of Gen Xers (often seen as “apathetic slackers”) and Millennials (often seen as “entitled selfie-takers”). These next gen donors — even though they sit at the top of their generation’s economic pyramid — are remarkably earnest about doing good in the world. They are driven by values, not valuables. And while they want to shake things up, they want to do so in the name of having bigger impact on causes that many of us hold dear. They genuinely want to use their power for good, and that’s good news, I think.

3. What have you identified as the key characteristics of next gen donors?

*Generation Impact* identifies and explores a whole range of key characteristics of next gen donors and the similarities and differences they see between themselves and the previous generations of donors. Most generally, as the title of the book suggests, they are a generation obsessed with impact. In a way, that underlies all the other characteristics. When they say they want to change the dominant strategies of big giving — doing more research and focussing on systems change or a few organisations vs. many — they do so in the name of impact, not just change for change’s sake. When they say they want to try new vehicles or tools, they do so because they are hoping these innovations will have greater impact than the traditional approaches. And when they say they want to develop much closer, more candid relationships with organisations they support, giving of their time and talent not just their treasure, they do so because this will make them better donors, able to give in ways that are most effective.

I think it’s also important to note that while these next gen donors are, indeed, revolutionaries, they are not bomb-throwers like that name might imply. In fact, we call them “respectful revolutionaries”. They are earnest and committed to living their values and want to do so in ways that respect the past. If they come from families with a giving legacy, they want to steward that legacy and find their place in the family story — even if stewardship means taking the legacy to the next level of impact. And instead of wanting to replace older generations of donors, they want to work alongside older generations, on multi-generational teams.

“They are driven by values, not valuables.”
4. How do we help next gens to succeed?
Speaking directly to how families — and professionals working with families — can help the next gen succeed, our book has two primary lessons: 1) take them seriously and 2) help them launch. A next gen hates being at the kids table. They want to be taken seriously as leaders with something valuable to contribute. So find ways to demonstrate to them that they have a meaningful role in the family giving, and take their suggestions seriously. They will certainly be coming up with new ideas and new strategies they want to try. Don’t ignore or discount those, even if eventually (after consideration that involves the next gen) you decide not to pursue them.

Also, recognise that the next gen is faced with a complex and difficult identity challenge. They are eager to change things for more impact but also want to find their place in the family legacy. In this mix, they are struggling to figure out their own emerging philanthropic identity — and this identity will then guide their giving for decades to come. They are particularly eager to have learning experiences that help them grow and work through this identity process. Give them those opportunities to learn. Encourage them to sit on boards and to pursue their own philanthropic interests outside of the family. And most of all, encourage them to become their own kind of donors and to find their own way.

5. How do next gen donors honour the past as they transform the future?
This is a common challenge in giving families in the US as well and something we talked about with next gen donors in our research. First, they acknowledge that it is indeed a challenge, so requires careful attention rather than just being swept under the rug or left undiscussed (as it often is). That’s the most important first step. When addressed, though, I think older generations in a family will be somewhat surprised by how open the next gen is to finding a resolution — and one that honours and continues donor intent and legacy in the family. For one thing, the next gen in giving families are, usually, very proud of that family legacy and feel it is their role to steward the legacy. They plan to do so by making the giving more effective, and they see this as honouring the legacy by “taking it to the next level”. But it is still done in the context of donor intent, we found.

Second, on the geographic challenge specifically, our data shows that the next gen actually believe very strongly in the importance of local giving, and if they are from a family with a history of place-based giving, they want to continue that local giving even if they themselves do not live in that community. Part of this local giving is about legacy, but it’s also about the next gen’s preference for giving in hands-on ways, building close relationships with organisations they support, and directly seeing the impact of their giving. All of those preferences are more easily met in local giving. Of course, they also want to do this local giving in their new hometown, and they usually do. But they don’t see this as a replacement for giving in the location where their family has traditionally given. They want to do both. So trusts or other institutions facing this challenge would do well to find ways to support and encourage the next gen’s giving in their own local areas — while also continuing the giving in the family’s traditional hometown. This can be done through matching programmes and discretionary giving, for instance, with the trust or foundation providing some designated funds for a next gen to give in their current hometown or matching personal funds that the next gen gives there. And, of course, it is vital that whenever the next gen visits the region where the family vehicle gives, they can “see” the impact of that family giving in a way that keeps them committed to it. They will want to continue a family legacy that they see is significant, even if they don’t see it every day.

6. How might New Zealand next gens differ or be the same to American next gens? Are there global next gen trends?
Our research was limited to donors in the US, but it is an important question, as there are good indications that a cadre of similarly eager and active next gen big donors are emerging around the globe. The same economic dynamics that mean these donors in the US will be the biggest in history are happening in other countries, to a greater or lesser degree, and so Gen X and Millenial donors from places like New Zealand will be the leaders of the philanthropic landscape there in the future. Here’s hoping someone is planning to do this sort of study in New Zealand. I’d love to help them out!
Philanthropy New Zealand

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