



# Philanthropy New Zealand

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## **Bulletin No 26 August 2007**

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### **NEWS**

**Philanthropy Matters Keynote speeches to be posted on [www.giving.org.nz](http://www.giving.org.nz)**

In response to numerous requests for recorded material from the Philanthropy Matters Conference, Philanthropy New Zealand has made the keynote speeches available on their website.

This valuable resource can be used in various ways; as a refresher, for trustees, to show at appropriate meetings, as a training resource and as motivation and inspiration.

A web link to the material will be available on [www.giving.org.nz](http://www.giving.org.nz) within two weeks. There will also be instructions on how to download media players if your technology is unable to access the material. We will send members an e-mail with the web link once it becomes available.

### **National Funders Forum announced**

Philanthropy New Zealand is to hold a National Funders Forum on 27 November 2007 in central Wellington.

Keynote speakers are to include The Northern Rock Foundation's Director Fiona Ellis and The Muttart Foundation's Executive Director Bob Wyatt.

Philanthropy New Zealand's Robyn Scott, is also keen to spend time discussing some of the work our members are undertaking. If you have interesting work going on or research you can share please e-mail [robyn@philanthropy.org.nz](mailto:robyn@philanthropy.org.nz)

Philanthropy New Zealand's AGM will be held at the same time. So there are many reasons to **mark your diary now** – November 27 - Numbers will be limited to 100. More details to follow.

### **Regional Funders Forums and Vibrant Communities**

Sherri Torjman, Vice President of Canada's Caledon Institute of Social Policy, spoke to three funders forums recently about her experience with the highly successful Canadian Vibrant Communities project.

The project is a community-driven effort to reduce poverty in Canada. It creates partnerships that make use of a community's most valuable assets – people, organisations, businesses and governments.

Participants in the forums (two were held in Auckland, one in Wellington) gained valuable information on working in partnerships and in accelerating the positive impact within the communities you fund.

A comprehensive report on Vibrant Communities will feature in the winter edition of Philanthropy News, due out in mid August.

### KiwiSaver Tax Credit

The Government has confirmed that Charities and tax-exempt organisations with paid employees will receive the KiwiSaver employer tax credit. The tax credit of \$20 per week per employee is offset against PAYE payments, and therefore charities who are income tax-exempt will still receive the tax credit.

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### ASB Trusts Research programme

ASB Trusts has been looking at where and to whom funding has gone in the past, as it tries to anticipate the needs of Auckland now and in the future. To help them achieve this, they are developing a research programme that will underpin their grantmaking, inform policy and guide decisions.

Where they can, they aim to work in partnership and collaborate with key stakeholders in their region to achieve the widest possible impact.

A good model of this is when ASB Community Trust partnered with Creative New Zealand and Auckland City Council on a major research project into Asian Aucklanders and the arts. This was a truly collaborative project involving a unique partnership of a philanthropic trust working alongside local and central government.

The report makes interesting reading and is available at the [ASB Community Trust Website](#). We will keep you informed as more research is completed.

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### Update from the Charities Commission

#### Restricting public access to your information on the charities register

Once your organisation has been registered, the Charities Register will contain a lot of information about the organisation. The Register is available to the public and they will be able to access it, and the information about your organisation, through the Charity Commission's website or by phoning the free information line 0508 242 748. This will help them understand your organisation and make informed choices about supporting it or using its services.

The Act requires information on the Register to be available to the public. However, it also allows the Charities Commission to prevent the public from seeing information if it is in the "public interest" to do so.

An information sheet explaining the circumstances in which organisations are able to request the Commission to restrict information from the public is available online: [www.charities.govt.nz](http://www.charities.govt.nz)

#### Charities Commission's position on advocacy

A reminder that because many charities are interested in the Charities Commission's position on advocacy, the Commission has published Fact Sheet 19: "Advocacy" and the Charities Act [http://www.charities.govt.nz/news/fact\\_sheets/advocacy.htm](http://www.charities.govt.nz/news/fact_sheets/advocacy.htm)

If you'd like to read the full Charities Commission update on their website, or print it out in its 2-column format, please visit [www.charities.govt.nz](http://www.charities.govt.nz)

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### Dynamic Community Learning Awards

Adult & Community Education Aotearoa (ACE Aotearoa), the McCombs-Rivers Family and Alison Broad are delighted to announce the third year of awards to recognise and celebrate community learning.

The two Dynamic Community Learning Awards carry cash prizes of \$200.

The Awards are to recognise excellence, innovation, 'giving things a go' – and the excitement that comes from Adult and Community Education.

If you are part of, or know of an organisation, which is making a difference in its community in this way, then why not recommend it for this award.

Do get more details and to receive an entry please e-mail Mary-Jane Rivers [awards@delta.net.nz](mailto:awards@delta.net.nz) or ph. 04 385 1415

The winner will be announced as part of Adult Learners' Week Celebrations: 3-9 September 2007.

### Corporate Community Investment in Australia

The Business Council for Australia was commissioned by the Prime Minister's Community Business Roundtable to undertake research into 'Corporate Community Investment' in Australia.

The result is a very significant piece of research which looks at the views and practices of more than 100 Australian Leading Companies.

The results are really interesting. They show clearly a move in Australia from ad hoc grantmaking and philanthropy disconnected from corporate interests and capacities, to Corporate Community Investment - which is increasingly embedded into business policies and strategies. And it is supported by pre-established criteria and pro-active decision making.

Just the executive summary makes a good read - and given that there is now so much Australian ownership of NZ businesses, this is a good embedded value basis for CCI in NZ. You can download a PDF of the full report at <http://www.bca.com.au>

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### World Wealth Report 2007

Merrill Lynch and Cap Gemini have released their 11th annual World Wealth Report. The Report reveals that 2006 showed "accelerated growth in terms of both GDP and market capitalisation — the two key drivers of wealth creation.

"That growth led to an increase in the number of high net worth individuals (HNWIs) around the world, and an increase in the value of their assets."

This year's report also takes an in-depth look at HNWIs' investments of passion and finds that "although art continues to be a favourite investment of this kind, luxury collectibles account for the largest spend."

The Report also discusses the philanthropy of HNWI. It states, "Led by the ranks of the ultra-wealthy, HNWIs are increasing the financial resources, time and thought that they donate to philanthropic causes.

"Philanthropy is increasingly being used to provide HNWIs with a social return on their investments, rather than to just leave a legacy for future generations.

"The way in which HNWIs give also is evolving due to an increasingly global perspective combined with an increase in the availability of investment approaches that enable support of a broader range of causes."

Furthermore, the Report indicates that HNWI worldwide contributed 7% of their wealth to philanthropic causes, which equates to more than US\$285 billion. The way this money is being contributed is being influenced by the means through which a new wave of HNWIs has created their wealth (in business and through personal investing). The Report is available at - [www.ml.com](http://www.ml.com)

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### Stories about the work of Nonprofit leadership

For compelling storytelling about the non-profit leaders supported by foundations, take a look at two 2006 Annual Reports from Canada - the [Maytree Foundation](#) and from the U.S. [the Meyer Foundation](#).

Both Foundations invest in leadership in different ways and both chose to tell stories in their reports about the remarkable people who serve their communities in extraordinary ways.

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### EDUCATION AND PROFESSIONAL DEVELOPMENT

#### Accelerating our Impact: Philanthropy, Innovation and Social Change

The J.W. McConnell Family Foundation commissioned this paper to contribute to an emerging body of knowledge and reflective practice on the role of funders in supporting innovation and social change.

They wanted to:

- Encourage funders of all sizes to accelerate their impact;
- Provide practical insights and examples of some of the opportunities and pitfalls of funding for durable social change;
- Refine their own foundation's performance through feedback and engagement with our readers and fellow grantmakers.

You can download a PDF of this report from our website: [www.giving.org.nz/research](http://www.giving.org.nz/research)  
Scroll down to leadership.

### Evaluation and Impact

In the continuing search for how to have more impact, learning from experience is a much-mentioned cliché. How does a foundation learn from experience? Evaluation is the answer and the practice that philanthropic advisors have recommended the most. In another effort to create tools for evaluation that will be truly helpful to a foundation. FSG Social Impact Advisors in the US has produced a new report [From Insight to Action: new Directions in Foundation Evaluation](#).

This is a report that highlights new approaches to gathering “forward-looking information that enables both funders and grantees to make ongoing improvements.”

As the author (Mark Krammer) points out, the question driving evaluation broadened from: What as the impact of our grants? to: What do we need to know to increase our effectiveness?

It is a weighty document but it is well worth the time it takes to download!

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### From Grantcraft – Participatory Action Research

It's been called a “bottom up” and “inside out” evaluation technique. In this [guide](#), contributors explore the benefits of participatory action research, a method of bringing applied research and evaluation skills to those closest to the issues involved. It is part of their series on [evaluation techniques](#).

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### The future of philanthropy

Senior foundation leaders have much wisdom to share about the changes that they have seen over years in the field of philanthropy and what lies ahead.

One very effective way to tap and share that wisdom was explored this year by the U.S. Foundation Centre, which marked its 50th anniversary by holding a symposium on the future of philanthropy and by asking five long time philanthropic leaders to reflect on key issues that will have an impact on that future.

The discussion of these leaders was captured on tape and in text shared freely through [The Foundation Center](#).

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### Sharing Knowledge in the world of philanthropy

The US Council on Foundations has just released videos of various sessions from their 2007 Conference held recently in Seattle. Melinda Gates, Co-Director of the Bill and Melinda Gates Foundation gave a really inspiring presentation.

Melinda captures the essence of much of what's so important in, and to our work in philanthropy. She canvasses a number of themes with some lovely examples of each. Including:

- All lives in the world being of equal value - and how that value underpins the work of their foundation.
- Connecting - the need to engage with government and business
- The value of learning from grant recipients
- Understanding what you are good at
- Learning as you go - reflecting and growing better practice
- Collaborating with other funders

The presentation takes about 35 minutes - a very, very good investment of time.  
<http://www.cof.org/confvideo.cfm?ItemNumber=9999&navItemNumber=10010>

Other addresses from the COF Conference are on their website [www.cof.org](http://www.cof.org).

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### UPCOMING EVENTS

#### Family Foundations Lunch

**Date:** Tuesday August 14

**Time:** 12 - 2pm

**Hosts:** The Tindall Foundation

**Venue:** 1 Blomfield Spa, Takapuna

This get together is an informal network of people involved with Family Foundations (either as Family Members, Staff or Volunteers) mainly in Auckland. The invitation is also open to other Trustees or Staff of your Trust or Foundation whom you may wish to invite along.

The August event, in addition to lunch and the usual networking opportunities will feature a couple of additional things.

Jenny Gill, PNZ Chair has recently attended a wonderful course at Stanford University and will give us a summary of her leanings in relation to family foundations. Chloe Harwood, who is the Community Research and Policy Adviser for ASB Community Trust, will give a short presentation on Auckland and New Zealand Trends and Demographics. These characteristics and trends are often discussed by us with relevance to making investments in the community and Chloe's presentation will form the basis of a discussion about what this means for us in the Family Foundation world.

So it will be a full and interesting meeting.  
**RSVP's to the Philanthropy NZ office by Thursday Aug 9 to [info@philanthropy.org.nz](mailto:info@philanthropy.org.nz)**

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#### Canterbury Funders Network

**Date:** Thursday 23<sup>rd</sup> August  
**Time:** Beginning with afternoon tea from 3.45 with the meeting running 4.00 - 6.00. Drinks and nibbles and more discussions probably from 5.45!  
**Venue:** The Arts Centre - the Lovell Smith Room

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#### Waikato Funders Forum

**Date:** Thursday 23 August  
**Time:** 12pm – 3.30pm  
 (Lunch 12 – 12.30pm)  
**Venue:** The Chartwell Room  
 Hamilton Gardens Pavilion

Staff from Perry's will be providing updated information on the recent merger with Scottwood Trust. And three Councils will present a summary of information gathered through Community consultation processes identified to be of interest to potential funders.

This is an opportunity for networking and information sharing and we would love to have as many people involved in funding as possible.

**RSVP:** [helen.paki@hcc.govt.nz](mailto:helen.paki@hcc.govt.nz)

#### National Funders Forum

**Date:** 27 November 2007  
**Venue:** Central Wellington

Keynote speakers are to include The Northern Rock Foundation's director Fiona Ellis and The Muttart Foundation's Executive Director Boy Wyatt.

More details to follow. **Mark your diaries now.**

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#### Any other Regional Funders meetings?

As a result of the successful series of regional funders forums held over the past year, a number of regional funders are now meeting on a regular basis. If you would like more people from your region to know about them, feel free to drop us a line with dates, times and any additional information to [rachel@philanthropy.org.nz](mailto:rachel@philanthropy.org.nz)

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#### Philanthropic Foundations Canada Conference – At the Heart of Philanthropy

The conference programme features concurrent sessions and speakers from Canada and the U.S. as well as other parts of the world. Themes and topics will address the personal engagement of donors and the strategic challenges facing Canadian and global philanthropy.

Speakers include;  
 Guy Laliberté, founder and CEO of Cirque du Soleil. He has created two foundations: the Guy Laliberté Foundation and the One Drop Foundation.  
 Bharat Mehta, City Parochial Foundation (UK), and Gerry Salole from European Foundation Centre.

More details and registration can be found on the [Conference Website](#).

*Noho ora mai  
 Robyn Scott  
 Executive Director  
 Philanthropy NZ*