

# In Touch

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Joel Orosz's Latest Book Available from Philanthropy New Zealand

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The Supply and Demand of Philanthropy in the 21<sup>st</sup> Century conference

## Events

**Evaluation, more than a tick box**

Date: Tuesday July 22  
Venue: Highwic, 40 Gillies Ave, Epsom, Auckland  
Register now

[info@philanthropy.org.nz](mailto:info@philanthropy.org.nz)

## News

### Successful regional funders forums

About 200 people attended the Regional Funders Forums we ran with the Office for the Community and Voluntary Sector in June and July, over 90% rating them very highly.

GEO's Director of Programs, Courtney Bourns, spoke to participants about their Change Agent Project which has been underway for three years in the United States. The project's goal is to promote strategies and practices that contribute to grantee success, recognising that grantmakers are only as effective as their grantees.

Courtney's presentation had many practical examples for grantmakers. One aspect that resonated around the rooms across the country, was the barriers to effective Grantmaking that GEO has identified, and the promising practices to address these. All seven forums were alive with discussion, many people sharing their experience and ideas.

The forums provided a wealth of information and ideas for future work. The feedback from the seven forums is being compiled and will be available on the website in the near future. Over 90% of the respondents said they want to attend more forums. The format of the events with an international dimension, and smaller group discussions worked very well for the attendees. The cry of "not long enough"; "we need more of these events" was heard from the top of the North Island to the bottom of the South. The feedback has given us lots of ideas for the future - we will keep you informed as we progress these ideas.

A Couple of websites Courtney mentioned that you may want to check out are:

[www.philafound.org](http://www.philafound.org) - an example of an organisation funding

[www.rjweanfdn.org](http://www.rjweanfdn.org) - an example of stakeholder engagement

Download GEO's Change Agent report Listen, Learn, Lead, and their action guide Imagine, Involve, Implement from [www.geofunders.org](http://www.geofunders.org).

Courtney's funders forums presentation can also be found on our website: [www.giving.org.nz](http://www.giving.org.nz)

### The devil lies in the detail...really

Courtney also talked about not for profit leaders' frustrations with existing reporting and application systems. They talk of excessive and extremely variable information sought in grant applications, high overhead costs, a feeling of mistrust about the nonprofit's work on part of the grantmakers, and time wasted in compiling grant reports that aren't really put to any use.

The newly released report, *Drowning in Paperwork, Distracted from Purpose*, is an attempt to help a growing movement of funders reduce the burden that grant seeking places on public-serving organisations, while still practicing responsible grantmaking.



It examines grant application and reporting practices, their impact on grantmakers and nonprofits and ways these can be improved. The report released by Project Streamline, presents field wide data compiled through surveys, interviews and focus groups conducted with foundations and their grantees across United States.

It recommends four core principles and a range of ways that grantmakers can adopt those principles into practice to relieve the burden on nonprofits. You can download the full report at: <http://foundationcenter.org>

### **Philanthropy New Zealand welcomes new team member**

We are very pleased to welcome Donna Gardner to our small staff team. Donna has experience in research, education and communications and the not for profit sector, most recently working with environmental organisations at the Ministry for the Environment. Her skills and knowledge are a welcome addition to our organisation.

Donna will be responsible for membership services and research. She is looking forward to meeting many of our members over the coming months through a range of projects. Contact Donna on email [donna@philanthropy.org.nz](mailto:donna@philanthropy.org.nz) or phone on 04 471 8911.

### **Research shows that 80% of volunteers also give**

A summary of the new research “How do New Zealanders give?” produced by Nick Jones & Associates Ltd and the OCVS, has been released. The report draws on data collected in 2007 through the “Consumer who Cares” service, as part of Nielsen Media Research Panorama, one of New Zealand's largest consumer surveys, engaging 12,000 people annually.

The report estimates that in the previous 12 months:  
1.2 million people volunteered (33.8% of all people 10 years and over)  
2.2 million people gave money or goods (60.3%)  
829,000 people supported in other ways, such as purchasing products (23%)

The research will inform the work of the Promoting Generosity project, a collaborative initiative, involving many organisations and individuals with an interest in generosity. Its role is to explore ways individuals and businesses can be encouraged to participate in their communities and local community organisations by giving time, money or in-kind donations.

The summary report can be found in the research section of Philanthropy New Zealand's website: [www.giving.org.nz](http://www.giving.org.nz) - it is placed under ‘sector’.

### **Information sheet on the Tax changes available online**

A one page information sheet has been developed by ComVoices outlining the changes to the way charitable donations are taxed. Called “Tax changes making giving easier”, it has a number of scenarios and examples aimed at helping philanthropists, grantmakers and the wider community understand the new tax environment. Here's a sample of the text.

- **What it means for individuals?** - Individuals are now able to claim a rebate of one-third (33.33%) of all donations they make, up to the limit of their taxable income.
- **What it means for companies?** - Companies and Māori authorities can now get deductions for all donations (up to the company's income) made to donee organisations.
- **What it means for the community?** - The changes will benefit all New Zealanders and the work organisations do in our communities.



Tax changes making giving easier can be found in the taxation section of Philanthropy New Zealand's website: [www.giving.org.nz](http://www.giving.org.nz)

## Arts Foundation Award for Patronage 2008

Long-time supporters of the arts, Roderick and Gillian Deane, have received the 2008 Arts Foundation Award for Patronage, for the substantial and sustained generosity they have provided to the arts.

Gillian and Roderick created the Deane Endowment Trust in memory of their daughter Kristen, to assist and benefit the community and individuals in the fields of the arts and culture, scientific research, education, the environment, disability, and the work of charitable voluntary organisations.

The Trust's focus on the arts and culture is by way of sponsorship of a number of exhibitions and publications by a range of Art Galleries and Museums; by the use of scholarships and grants, especially for educational purposes for young singers, musicians, dancers and artists exhibiting outstanding potential; and through donations to a number of classical music and opera organisations particularly those centred in Wellington.

The annual Award honours philanthropists who actively contribute to the arts in New Zealand. Previous recipients are Denis and Verna Adam and Jenny Gibbs. [www.artsfoundation.org.nz](http://www.artsfoundation.org.nz)

## Update from the Charities Commission

Our early estimates of there being around 25,000 charitable organisations in New Zealand appear to have been reasonably accurate - in total, we have received almost 24,000 applications

### Registration Update

Charities registered: 8,146

Processing time: Our registration analysts are currently making initial reviews of applications received from: 14 April 2008.

### Snapshot - Charities registered at 30 June 2008

Areas of operation were as follows (note: the total is greater than the total number of registered charities, as some organisations tick two or more categories on their application):

#### New Zealand

Auckland - 1,341	Northland - 422
Bay of Plenty - 551	Otago - 536
Canterbury - 986	Southland - 273
Chatham Islands - 16	Taranaki - 281
Gisborne -50	Waikato - 643
Hawkes Bay - 377	Wellington - Wairarapa - 887
Manawatu - Wanganui - 460	West Coast - 169
Nelson - Marlborough - Tasman - 360	Nationwide - 2,078

For the full update visit [www.charities.govt.nz](http://www.charities.govt.nz)

## Vodafone NZ Foundation opens applications for 2009 World of Difference programme

Philanthropy New Zealand member, Vodafone NZ Foundation, make grants for salaries available to youth organisations or projects as part of its annual World of Difference programme. World of Difference awards pay the salary (up to \$60k) and expenses (up to \$30k) of individuals for 12 months. 32 people have received these awards over the last 6 years. They are now calling for 2009 applications which close August 15 2008. For more info visit: [www.worldofdifference.co.nz](http://www.worldofdifference.co.nz)

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## **Centre for Social Impact to strengthen Australia's non-profit sector**

A Centre for Social Impact is to be established in Australia to stimulate the country's philanthropic climate and build the capacity of its non-profit sector. The Centre will bring together three universities, the University of New South Wales (at which it will be based), Swinburne University through the Asia-Pacific Centre for Philanthropy and Social Investment, and the University of Melbourne through its Business School.

Government funding for the Centre to the tune of A\$12.5million will be augmented from other sources. The Centre is to be headed by Dr Peter Shergold, former Secretary of the Department of Prime Minister and Cabinet. For more information: [www.swinburnephilanthropy.net](http://www.swinburnephilanthropy.net)

## **EFC takes first step towards European foundation database**

European Foundation Center (EFC) and GuideStar International have begun cooperating on a three-month study to determine the feasibility of creating a European foundation database. The project, which began in early February, will be divided into two phases.

In the first phase, GuideStar will research potential sources of data in ten European countries, including Estonia, Germany, Hungary, Italy, Spain and the UK. Phase 2 will include the development of more specific requirements for a European foundation database, such as the reporting framework, web functionality, and a business plan for future implementation.

For more information: [www.efc.be](http://www.efc.be)

## **Women & Philanthropy: Inspiring women, inspired giving**

Many women are becoming involved in philanthropy, establishing charitable foundations, and having a significant impact on major philanthropy, but they are largely unknown outside of those they help, according to this, the first comprehensive study of women and philanthropy in the UK. They lack both the profile and the recognition achieved by many male donors.

Consequently they are under-represented in giving statistics, and their approach to, and involvement in, philanthropy goes unreported, says the study. The report also features profiles of J K Rowling, Sigrid Rausing, Darcey Bussell and Renu Mehta; historical and global perspectives of women's philanthropy; and a look at the growing trend in giving circles and networks.

To download: [www.philanthropyuk.org/Newsletter/SPECIALREPORTWomenPhilanthropy](http://www.philanthropyuk.org/Newsletter/SPECIALREPORTWomenPhilanthropy)

## **Giving by US family foundations up 21% in 2006**

US family foundations paid out \$17 billion in grants in 2006, a 21% increase from the previous year, according to the 2008 edition of the Foundation Center's Key Facts on Family Foundations. Giving by family foundations has more than doubled since 1998, says the report, and accounts for 59% of giving by independent foundations overall. The largest of such foundations, the Bill & Melinda Gates Foundation, is hardly typical of the class. Many family foundations in the Center's survey were small, with almost half awarding less than \$50,000 annually. For more information:

<http://fconline.foundationcenter.org>

## **Over three-quarters of giving to developing world comes from private sources**

According to the Hudson Institute's Index of Global Philanthropy, private giving and investment accounted for over 75% of donor countries' entire economic dealings with developing nations in 2006. As a result, argues the Index, government aid agencies are rapidly changing the way they operate to leverage official aid, with activities launched and run by private businesses, foundations, charities, religious groups and universities.



In addition, the new 2008 edition of the Index announces the results of a survey which found that US religious giving to help poor nations abroad, amounted to \$8.8 billion in disaster and development assistance abroad from religious congregations in the US. The report also highlights the growth of individual giving, the rise of internet-based philanthropy, and what it describes as the blurring of the lines between business and philanthropy.

To download the report go to: [www.hudson.org/files/documents](http://www.hudson.org/files/documents)

## EDUCATION AND PROFESSIONAL DEVELOPMENT

### Evaluation, more than a tick box

The inaugural meeting of Philanthropy New Zealand's Evaluation Affinity Group is set for 22 July. We've been working with several partners including the ASB Community Trust to promote evaluation as a means to foster continuous improvement and development. We want to grow evaluation learning and capacity in an organic way that supports existing grantmaker practices to:

- build learning and understanding of evaluation amongst New Zealand grantmakers
- contribute to building the capacity of the philanthropic and community and voluntary sectors
- develop resources and knowledge of evaluation for sharing within the sectors.

The Evaluation Affinity Group will meet regularly, work together and utilise external expertise, to learn more about evaluation. This is a great initiative for members wanting to understand evaluation, in the search for greater impact. Time and venue details are in the events section of this In Touch.

### Online forum to support NGO governance

The Global Forum on NGO Governance is a worldwide online forum that supports resource sharing and idea exchange for all who work with, or serve on, NGO boards. Launched in 2007 by BoardSource, the Forum's website serves as a forum for discussions and exchange of advice on NGO governance issues, and as a place to share governance-related documents. The site also includes a member directory, a listing of governance technical assistance providers around the world, and a listing of NGO governance-related events. For more information: <http://ngoboards.org>

### New from Grantcraft - Supporting Individuals

Can foundations extend their impact more directly through grants or expenditures that support individuals? Examples would be scholarships, prizes and awards programmes. What do such grants accomplish?

Investing in People and their Communities, a new guide in the grant-making practice series from Grantcraft, features the elements of a well-crafted programme and explains why scholarships, prizes, and other such grants can have a profound influence on organisations, fields, or communities.

The guide aims to help grantmakers design and manage a grants-to-individuals programme, including developing a theory of change, using the right funding mechanism, and finding the right people to support. Please note this guide is aimed at an American audience: [www.grantcraft.org](http://www.grantcraft.org)

### Community engagement and community cohesion

This Joseph Rowntree Foundation, paper explores the challenges to be addressed if government policies to promote community engagement are to be genuinely inclusive of newcomers, as well as more established communities. Read the key points or download the findings at: [www.jrf.org.uk](http://www.jrf.org.uk).



## **Effective Foundation Management**

This is the latest publication from Joel Orosz, author of the very accessible and practical book “An Insiders Guide to Grantmaking.” His latest effort; “Effective Foundation Management: 14 Challenges of Philanthropic Leadership and How to Outfox Them”, is also receiving rave reviews.

There is no science to the management of charitable foundations, and even the art of managing them is poorly understood. The foundation field is relatively young, university centres for the study of philanthropy arrived only recently, and foundation leaders typically had little experience in the foundation field before taking their posts. Consequently, both seasoned and aspiring CEOs fall into traps that make them less effective leaders.

These traps arise from the highly idiosyncratic nature of the foundation field, and thus are not fully understood by leaders whose training and experience generally lie elsewhere.

But there are predictable challenges and recognisable dilemmas, and a hard-won knowledge base does exist. In *Effective Foundation Management*, Joel Orosz, a seasoned philanthropy professional and educator, introduces the new foundation board member CEO, vice president, programme officer, and other foundation staff members to seven vexing challenges and seven inescapable tradeoffs, along with strategies for meeting and resolving them.

In simple and engaging terms, Orosz describes the steps foundation leaders need to take to maximize positive social impact and avoid poor outcomes - in other words, to become fully effective in their consequential roles.

*“Effective Foundation Management: 14 Challenges of Philanthropic Leadership and How to Outfox Them”* - available from Philanthropy New Zealand for \$40.00 including gst and postage. Orders can be sent to [info@philanthropy.org.nz](mailto:info@philanthropy.org.nz)

Joel will also be a keynote speaker at Philanthropy New Zealand’s 2009 Conference, Te Papa, 18<sup>th</sup> and 19<sup>th</sup> March, 2009.

## **EVENTS**

### **Evaluation, more than a tick box**

Date: Tuesday July 22

Venue: Highwic, 40 Gillies Ave, Epsom, Auckland

Time: 9:30 am coffee/tea for a 10:00am start

This is the inaugural meeting of the Evaluation Affinity Group. Join fellow Philanthropy New Zealand members to grow evaluation learning and capacity within the philanthropic and community and voluntary sectors. Share and develop knowledge that will assist you and the sectors as a whole to foster continuous improvement and development.

To register please contact Jolly Fernandes: [info@philanthropy.org.nz](mailto:info@philanthropy.org.nz) or ph: 04 499 4090



## **The Supply and Demand of Philanthropy in the 21st Century: Strategies for Fundraisers and Financial Professionals**

Date: October 7th & 8th 2008

Venue: Boston College, Chestnut Hill, MA, USA

The Center on Wealth and Philanthropy at Boston College and the Association of Fundraising Professionals (AFP) are pleased to offer a conference at Boston College specially designed for wealth advisers, estate planners, fundraising professionals, directors of planned giving, vice presidents of development, and CEOs and board members of nonprofit organisations.

This conference will explore the new dynamics of philanthropy—the idea that donors desire, rather than resist, greater charitable involvement, and that philanthropy is becoming a large part of people’s “financial morality.” By understanding the implications of these new dynamics, fundraisers and financial professionals can implement new strategies that will make their counsel more fulfilling for their clients and more rewarding for themselves. For more details and to register go to the The Center on Wealth and Philanthropy at Boston College website.

## **Philanthropy New Zealand Conference ‘09**

DATE: March 18th and 19th 2009

VENUE: Te Papa, Wellington

Keynote speaker Joel J. Orosz is a leading author and educator. He’s written two books on philanthropic practice; “An Insiders Guide to Grantmaking,” which explored the complex role that grantmakers play, and “Effective Foundation Management: 14 Challenges of Philanthropic Leadership and How to Outfox Them”.

The 2009 conference will once again combine with the Community Trusts conference and will build on the achievements of last year’s Philanthropy Matters Conference also held at Te Papa in Wellington.

**Mark your Diaries now - MARCH 18 & 19 2009 - Te Papa Wellington**

## **Philanthropy Australia Conference**

Date: 16 - 17 October 2008

Venue: Sofitel, Wentworth, Sydney

Keep an eye on Philanthropy Australia’s [Conference Website](#) for more details.

*Noho ora mai  
Robyn Scott  
Executive Director  
Philanthropy New Zealand*