



Philanthropy New Zealand

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Sherri Torjman to speak at Auckland regional funders forums and Wellington funders network

NEWS

Government to Remove Tax Rebate Threshold

Dr Cullen's May budget delivered some very good news for the philanthropic, community and voluntary sectors. The Government will remove the tax rebate threshold for individuals, companies and Maori authorities donating to charities.

This more conducive tax environment should encourage greater giving among New Zealanders seeking better opportunities for their communities. The Government will also set up ongoing work to investigate further issues, such as workplace giving, volunteers' reimbursement payments and honoraria.

From Dr Cullen's speech.....

"As a consequence of the submissions on the discussion document (outlining options in relation to the taxation of charitable donations) the Government has decided to remove the current rebate threshold on individuals' charitable donations.

In future, all such donations to organisations with charitable donee status will qualify for the 33 per cent rebate. The deduction limit on charitable donations made by companies and Maori authorities will also be removed. The company deduction will also be extended to small-unlisted companies.

In November this year the Government will issue a further discussion document on proposals for a system of payroll charitable giving. This, if approved, would provide a mechanism for employees to donate to their charity of choice and receive a deduction immediately."

The closing date for submissions on the Taxation (Annual Rates, Business Taxation, KiwiSaver, and Remedial Matters) Bill is 12 July. The bill was introduced on 17 May, received its first reading on the same day, and was referred to Parliament's Finance and Expenditure Committee for consideration. Information on how to make a submission to a select committee is available at: www.parliament.nz

Philanthropy New Zealand will be making a submission, but it is important members with an interest in this work also make a submission.

We will keep you fully informed on this and any other progress and will seek members' view and input as necessary.

Funders Forums held throughout New Zealand

There has been a flurry of meeting, greeting, and heavy weight discussion as around 200 philanthropists and grantmakers, from both the private and public sectors, took up the opportunity to connect with each other at the 10 Regional funders forums held around the country.

The forums have been organised by Philanthropy New Zealand, the Office for the Community and Voluntary Sector and the Department of Internal Affairs to help funders share information and good practice on grantmaking.

Private philanthropists, corporates, government grantmakers and representatives from various trusts who fund activities in certain regions have all attended the meetings.

Anne Burleigh from Britain's Northern Rock Foundation proved a very popular keynote speaker. She spoke on a variety of topics around collaboration, training and development.

Anne explored many practical ways of working together, and discussed the Northern Rock Foundation's Training and Development Programme for Not for Profit organisations.

Another popular feature of the forums were the regional snapshots. They are filled with information about all facets of the region including material on funders and access points to facts and figures helpful in the grantmaking process.

It was very pleasing to see a high turnout of Philanthropy New Zealand members and it became very apparent that engaging with other funders in their region is becoming a more important part of philanthropists' work.

The profiles of the 8 regions are now available to anyone who has an interest in learning more about a specific region. Copies of Anne Burleigh's presentations are also available. You'll find all these resources on Philanthropy New Zealand's website - www.giving.org.nz

Two more forums are planned for Auckland on the 5th and 6th July. Participants can attend either one or both forums depending on their areas of funding or interests. More details of these forums can be found in the Upcoming Events section of this In Touch.

Congratulations Stephen Tindall!

Philanthropy New Zealand member Stephen Tindall has received further recognition of his business, philanthropic, and social work by being made a Distinguished Companion of the New Zealand Order of Merit.

This is the second official recognition of his achievements. He was made an Officer of the New Zealand Order of Merit in 1997. Stephen and his wife Margaret founded the Tindall Foundation in 1995.

They are driven by a desire to support initiatives in New Zealand which assist communities to help themselves and to heal problems rather than manage them.

New Appointment

AllianceBernstein has appointed Mel Hewitson as Manager, Institutional Relationships.

For the past 12 years Mel has been an integral part of Tower Assets Management's NZ sales and client relations effort. She has almost 20 years experience in the asset management industry. Mel took up her new position on June 4 relocating from Auckland to Wellington.

Update from the Charities Commission

Avoid uncertainty and apply now
As many of you would have read in our Newsflash of 15 May, the Charities Commission is expecting to receive a very large number of applications for registration between September 2007 and July 2008 (when the tax laws relating to charities change). This may affect processing times and could lead to uncertainty for applicants surrounding tax exemptions. It could also cause a delay in having your organisation's details publicly available on the Charities Register. With this in mind, we are encouraging all charitable organisations considering registration to beat the rush, avoid any uncertainty and apply now.

Charitable purpose and sport

Many readers expressed an interest last month in receiving a copy of the paper that will set out our view of the law of charitable purpose as it applies to amateur sporting bodies.

The Commission is currently seeking external legal opinion on its approach to ensure it is as thorough as possible.

If you would like to receive a copy of this paper when it becomes available, please send your contact details, outlining your request, to info@charities.govt.nz or call us on freephone 0508 242 748. We'll also post it on our website. If you would like copy of the full update e-mail update@charities.govt.nz

Tough is not Enough

About 10% of offenders do the vast majority of offending. This is the group that programmes and services should target first, according to Kaye McLaren author of "Tough is not Enough – Getting Smart about Youth Crime".

This literature review was carried for the Ministry of Youth Affairs in 2000. As well as describing the interventions, which the best research shows, are effective; the review identifies the broad principles that underpin successful interventions.

Research shows that crime is one of the results when young people fail to do well in the four environments of positive development. These involve success in family, school/work, positive peer group and community development. One of the clearest characteristics of interventions that work is that they help young people to succeed in one of more of these areas.

This review is a valuable resource for people working on solving the problem of youth crime, from policy analysts to programme providers.

Tough is not Enough is no longer available in print, however, It can be downloaded from the [Ministry of Youth Development website](#)

A Collaborative Working Unit set up in Britain

The Baring Foundation, together with Bridge House Trust and Lloyds TSB Foundation, is supporting a new and interesting project called the Collaborative Working Unit (CWU) at the National Council for Voluntary Organisations.

The unit aims to promote the range of collaborative working options available to voluntary and community organisations, enabling them to make informed decisions about whether and how to collaborate and to provide support and information to enable them to pursue these options.

Funders are in a key position to help promote collaborative working – in order to ensure that funds are used to greatest effect and reduce unnecessary duplication of products and services.

The CWU carried out some baseline research into funders' awareness of collaborative working.

About one third demonstrated wide general awareness of collaborative working and its possible functions. The research reveals that 75% of funders recognise they have an important role to play in collaborative working and 65% said they would fund collaborative working in the future.

A copy of the full report or executive summary is available from the CWU's new website www.ncvo-vol.org.uk/collaborate or by e-mailing collaborate@ncvo-vol.org.uk

If you would like further information about the unit or to join its mailing list, please use the above contact details.

EDUCATION AND PROFESSIONAL DEVELOPMENT

Foundations for Organisational Development

Research into practice in the UK and USA – 2007.

Today, both grantmakers and their beneficiaries are faced with the same important questions: how can we make the best uses of limited resources in the face of ever growing need? And how can we develop and sustain high quality services in an ever more challenging environment? In response more funders are considering supporting organisational development (as opposed to grants for the delivery of particular services).

This study funded by Northern Rock Foundation and the Baring Foundation focuses on those specific programmes set up to support organisational development. It is based on an extensive literature review, supplemented by a series of expert interviews from both sides of the Atlantic.

To illustrate the findings the report focuses on ten case study organisations (including the Northern Rock Foundation). The case studies follow the spectrum of significant investments of money and effort to promote far-reaching organisational and cultural changes to carefully timed and targeted small grants that can have a significant impact or alternatively to funding shared services, aimed at a cluster of organisations that can make limited funds go much further.

The report suggests a framework for analysing organisational development, poses questions to consider when setting up an organisational development programme and asks where next for organisational development.

This study has much to offer in terms of the experience that it reports and the conclusions that it draws. It deserves to be widely read and can be downloaded from the [Northern Rock Foundation website](http://www.northernrockfoundation.org/)

Articles of interest to small trusts and foundations

Garth Nowland-Foreman discovered this series of articles on capacity building and collaboration from the Human Interaction Research Institute.

Although they have a US focus, the material provides practical and interesting information relevant to smaller trusts and foundations. Here's an excerpt from "Capacity Building for Smaller Foundations"

"Defining Smaller Foundation Capacities.

The field of philanthropy has yet to reach consensus about the core competencies or capacities smaller foundations need to fulfil their missions effectively. In fact, this is still a subject of debate for the entire nonprofit sector, though there seems to be reasonable agreement on strong management and sound governance as core attributes of effective nonprofits, along with organisational stability, financial stability and programme quality.

This paper defines four core capacities smaller foundations need to be effective: Legal, Financial Governance and Philanthropic.

In addition, smaller foundations need to develop a generalised learning capacity in all four areas - the ability to observe, seek information and guidance, and absorb what's learned into their philanthropic strategy and operations".

"Capacity building for smaller foundations: Shoes for the cobbler's children".
<http://www.humaninteract.org/images/Cobblerscas-ey-fdncbppr.pdf>

"Collaboration approaches for smaller foundations: Partnering to focus on results for

communities".

<http://www.humaninteract.org/images/finalrep137.pdf>

"The psychology of philanthropy and community change".

<http://www.humaninteract.org/images/seniorfellow-UCLAsph.pdf>

"Donor perspectives on nonprofit capacity building".

<http://www.humaninteract.org/images/finalrep138-1-donor.pdf>

Donor perspectives on place-based philanthropy.

<http://www.humaninteract.org/images/finalrep138-5-donor2.pdf>

"Who comes to the table? Stakeholder interactions in philanthropy". - An excerpt from this paper:

"Bringing stakeholders to the table and promoting their interactions with decision makers in philanthropy (foundation staffs or boards) is important to the success of philanthropy for a number of reasons. Eight of them will be discussed here.

- 1 - Improving grantmaking and other aspects of the basic philanthropic process
- 2 - Increasing leverage
- 3 - Increasing accountability
- 4 - Improving transparency
- 5 - Facilitating decision involvement
- 6 - Improving access to information
- 7 - Increasing access to partnerships
- 8 - Empowering communities

The paper discusses these ideas in detail and goes on to explore the modes of interaction that bring stakeholders together".

<http://www.humaninteract.org/images/insp-paper.rtf.pdf>

Capacity building for smaller foundations: Making an investment in ourselves.

<http://www.humaninteract.org/images/casey-fdncbppr2.pdf>

Hard lessons about Philanthropy and Community Change

This is the story of a philanthropic initiative that did not meet the expectations of its many stakeholders.

Given the challenging social problems that foundations and our grantees try to solve, we should expect that we will often fail to achieve our shared aspirations. When this happens, we should seize the opportunity to understand the causes in order to improve our own performance and benefit others working in the field.

In 1996 the Hewlett Foundation launched a US\$20 million Neighbourhood Improvement Initiative. It is an acknowledged disappointment whose impact did not reflect the large investments of financial and human resources.

A new report, "Hard Lessons about Philanthropy and Community Change from the Neighbourhood Improvement Initiative", talks to some two dozen individuals inside and outside the Foundation about what went right and what went wrong, and what lessons both Hewlett and others contemplating or involved in similar initiatives can learn.

It constitutes a reminder, say Paul Brest, Hewlett Foundation President, of "what happens when a foundation and its partners fail to achieve clarity about goals, strategies and how to measure progress".

For more info or to read the report go the [Hewlett Foundation website](#).

UPCOMING EVENTS

Sherri Torjman – keynote speaker at meetings in Auckland and Wellington

Sherri Torjman is Vice-President of the Caledon Institute of Social Policy in Canada. The Caledon Institute is an independent social policy think tank that conducts vigorous high-quality research and analysis to develop social policy alternatives in a range of areas.

Ms. Torjman is author of many Caledon reports, including: *Strategies for a Caring Society*, *Innovation and Community Economic Development*, and *Proposal for a National Personal Supports Fund*. In addition, Ms. Torjman authored the welfare series of reports for the National Council of Welfare; four books on disability policy and, most recently, *Shared Space: The Communities Agenda*.

Ms. Torjman has worked for the House of Commons Committee on the Disabled, and the House of Commons Committee on Child Care.

She was also co-Chair of the Technical Advisory Committee on Tax Measures for Persons with Disabilities.

For more information on the Caledon Institute go to www.caledoninst.org

Auckland Regional Funders Forums

Date: Thursday 5 July 2007

Time: 10:00am – 3.00pm

Venue: The Waikowhai Room, Fickling Convention Centre, 546 Mount Albert Road

And/OR

Date: Friday 6 July 2007

Time: 10:00am – 3.00pm

Venue: Lincoln Green Conference Centre, 159 Lincoln Road, Henderson

The day will focus on information exchange, exploring locality-based collaboration, sharing local examples and networking on opportunities for collaboration on common issues of interest in Auckland communities.

Sherri Torjman, will explore "Vibrant communities". She will present case studies about community partnerships and how community collaboration with the help of philanthropic funding has contributed to creating vibrant communities.

Invitations will be mailed in the next week.

Wellington Funders Network

Date: July 19

Time: 9.45am – 12 (followed by a light lunch)

Venue: Turnbull House
11 Bowen St. Wellington

Philanthropy New Zealand is hosting this opportunity for funders in Wellington hear from the Caledon Institute's Sherri Torjman. (bio above) She will explore the issue of "Vibrant communities", and how community collaboration with the help of philanthropic funding has contributed to creating vibrant communities.

There will be time for networking also - an important part of the meetings!

You can register now at info@philanthropy.org.nz

Noho ora mai

Robyn Scott

Executive Director

Philanthropy New Zealand