

In Touch

News

Tax rebate cap removed today
Regional roundup

Professional Development

Assessing effectiveness
Supporting next generation leadership

Events

Engage your community: using blogs etc

News

Tax Rebate Cap removed today

Philanthropy New Zealand predicts an increase in giving will result from a tax change that comes into effect today.

The change means the tax rebate cap for individuals, companies and Maori authorities has been removed. Philanthropy New Zealand's Executive Director Robyn Scott says removing the cap means New Zealanders have a greater opportunity to be more generous, as they receive a larger rebate.

Robyn says business giving has a lot to gain from this law change as well. "They no longer need to be tied to sponsorship arrangements. Businesses can now give up to the limit of their income bringing them into line with individual giving. The Giving New Zealand research shows only 7% of businesses gave in the 2005/2006 financial year, so there is room for improvement there."

Robyn adds today's law change recognises the great value the community and voluntary sector returns to New Zealand communities on a daily basis. "Today is a good day to be generous," she says. (A copy of the full media release is attached with this edition of In Touch).

Regional Roundup

There's a lot going on around the country. Since the regional funders forums last year some new networks have emerged and others are continuing to build on and consolidate their membership. We've been talking to some of these networks about what they have been doing.

Bay of Plenty and Central North Island

The network had a successful meeting in November in Rotorua. Around 25 attended the meeting with a good mix of funders, including funders that had not previously been part of the network or were from outside the Rotorua area.

The meeting hosted speakers from the Canadian PLAN initiative, followed by a group discussion on options and models for local collaboration. The network is collaborating on an informal basis and at this stage focusing on developing knowledge of and relationships with other funders. Details for the next meeting are still to be confirmed.

Hawkes Bay

A steering group has been set up it's working on terms of reference for the group and developing an event in the first half of 2008. They are working on expanding the network and learning about funders in their region.

Events

Maori in Philanthropy Hui
Date: Thursday June 12 2008

Philanthropy New Zealand Conference '09
Date: March 18/19 2009
Mark your diaries now!
Details in Events section.



Otago and Southland

The network has led a number of successful activities. They held a forum at which Dunedin Council of Social Services (DCSS) presented results of a survey of not for profits, which examined their issues and challenges with funders. Funders at the forum responded with their views. DCSS will present a final report at a joint meeting of funder and funded representatives. The network also hosted Judge Andrew Beacroft.

Members of the network are updating their brochure for funding applicants, including items such as: 10 tips for a good application, how to do a budget, what funders look for and how to find out about funders.

Waikato

The Waikato network held a successful forum with around 25 attendees. A speaker from the Ministry of Social Development presented on sustainable funding. The network has now set up a working group on sustainable funding and collaboration in the region. Their first task is producing a matrix of funders. The network intends to hold its next meeting in June.

South Canterbury

The network has focused on combined funder meetings to raise funding for specific projects, such as the Timaru hospice, rather than networking meetings. They are keen to build the network, but as a small group are happy to attend regional forums in Dunedin or Christchurch, rather than specifically for South Canterbury.

Whanganui

The network has continued their informal meetings and relationships.

West Coast of South Island

Funders on the West Coast met in mid-March to share information about their organisation's goals and funding criteria. A number of collaborative funding opportunities arose from those discussions. The group intends to meet once or twice a year.

Important information for funders has been released by the Charities Commission as the deadline for registering charities rapidly approaches

Backdating of organisations' charitable entity status

"The Commission is working hard to process all applications by July 1 2008 so applicants can be sure about their tax commitments. However, with the number of new applications continuing to increase (currently around 360 per week), it is unlikely all charities will be registered until later in the year.

"Applications are processed in the order we receive them. The Commission has the power to backdate an organisation's charitable entity status to the date it received its properly-completed application. This means an organisation that complies with the Act during the period which its application is being processed can claim the tax benefits of a registered charity for that period. A properly-completed application includes a set of rules, at least one Officer Certification form, and a certified application form. For more information on backdating visit:
http://www.charities.govt.nz/news/fact_sheets/backdating.html

"The Commission reminds funders that the Charities Register is unlikely to be fully populated until later this year, after the initial registration period is over. For that reason, we suggest that it is too early for funders to be fully reliant on the Register for making decisions about the distribution of funding.



“Funders may wish to consider whether it is practical to require evidence of registration with the Commission from recently-formed charities as part of their decision-making processes, before the Register is more fully populated. After 1 February 2007, when the Register opened, Inland Revenue stopped issuing charities with a letter confirming their charitable-purpose tax exemptions.

Processing time

“Our registration analysts are currently reviewing applications received from early November 2007.”

OCVS Director moves on

Brenda Ratcliff has left her position at OCVS to move to a new role in the Ministry of Social Development's (MSD) Human Resources group - as Lead Organisational Development Advisor. Brenda joined the OCVS as Director in July 2004. While in her role at OCVS Brenda has been responsible for a number of significant ventures with the Community and Voluntary sector - including the Regional Funders Forums with Philanthropy New Zealand and the Dept. of Internal Affairs in 2007. Brenda is a passionate advocate for the sector and her enthusiasm and commitment to this will be much missed. The recruitment process for a new Director has begun. In the meantime Ruth Harrison has been appointed as interim Director to lead and support the office through the next few months. Ruth will be known through a number of former roles. Most recently she has been the Chair Commissioner of the Mental Health Commission.

Survey of Government Funding of Non-profit Organisations report available online

The Survey of Government Funding of Non-profit Organisations gives a broad view of central government's funding of non-profit organisations (NPOs).

In June 2006, a questionnaire was sent to government departments seeking information on the size of government funding flows to NPOs. The results of the survey provide a broad overview of central government's funding of non-profit organisations. The survey has highlighted (among other things) that in 2005/06: the largest amounts of departmental payments were made to NPOs in the social services, education and health activity sectors; contract payments for services dominate over grant funding; and there are difficulties tracking payment and funding arrangements through more than one agency to NPOs.

This was the first time that a comprehensive survey has tested information about government payments to this sector, and is the result of discussions that Philanthropy New Zealand and others from the sector had with the Minister for the Community and Voluntary Sector - at the time of Philanthropy New Zealand planning to undertake Giving New Zealand in order to quantify non government funding. Although exploratory, the survey has provided useful benchmark information about the Government's interactions with the non-profit sector. Together with Statistics NZ's Non-profit Institutions Satellite Account: 2004, and Philanthropy NZ's Giving NZ 2006 report on philanthropic funding, we are beginning to build a clearer picture how the community and voluntary sector is resourced in New Zealand. See the Survey of Government Funding report on the DIA website.

Five-year study will support troubled youth

The most comprehensive ever study on troubled young New Zealanders is to be led by Massey University, with a focus on support and interventions for struggling youth. The Foundation for Research, Science and Technology today announced the latest funding in the Building an Inclusive Society portfolio, with the Massey Pathways to Resilience project receiving \$3.75 million of the total \$8.1 million. Principal investigator Dr Jackie Sanders says the Resilience project will run for five years, following 480 troubled young people - those known to Government agencies including Child, Youth and Family - to find what works to overcome adversity and turn their lives around. More information at: <http://www.scoop.co.nz/stories/ED0803/S00070.htm>

~ PO Box 1521 ~ Wellington ~ New Zealand ~ Phone: (04) 499 4090 ~ Fax: (04) 472 5367 ~
~ Email: info@philanthropy.co.nz ~ Website: www.giving.org.nz ~



Paul Newman charity donates NZ\$100,000

Movie star Paul Newman's 2008 charity campaign will see NZ\$100,000 donated to New Zealand charities. The Newman's Own Foundation was formed in 1984 with the purpose of allocating the profits from sales of Paul Newman's products to charity groups worldwide. This year the Newman's Own Foundation will allocate up to NZ\$20,000 to each successful charity and submissions for funding can be made from today. Go to <http://www.scoop.co.nz/stories/CU0803/S00233.htm> for more information.

League Club distances itself from pokie harm

In an era where many sports clubs are struggling to survive, one league club is trying innovative ways of regaining community support. The Mt Wellington Rugby League Club has been home to many league greats in its 60 year history. In more recent times it fell into a severe decline but is steadily rebuilding itself by reaching out to its local community with a message of encouragement to get involved in healthy activities. And it's backing up this healthy message with plans to free itself of pokie funding.

Club president Dean Kini says the club wants to become a centre of healthy activities for the whole family and relying heavily on funding from the sale of alcohol or gambling grants is not compatible with this. <http://www.scoop.co.nz/stories/PO0803/S00250.htm>

CIVICUS new Secretary General appointed

Ingrid Srinath, currently Chief Executive of Child Rights and You (CRY) in Mumbai, India, will take over from Kumi Naidoo and assume the position of Secretary General-Elect of CIVICUS on 1 May 2008. "The CIVICUS Board believes that Ingrid possesses all the right skills to develop the organisation in the years to come. She brings valuable experience and a fresh perspective to this global family of civil society and I am convinced she will energise the movement we began," said Annabel Cruz, CIVICUS Board Chair. Kumi Naidoo, who has served as Secretary General since 1998, will step down as Secretary General at the end of July following a 3 month hand over period. Kumi will remain highly involved in the work of CIVICUS as the new Honorary President. With the arrival of Ingrid Srinath, the CIVICUS Board is convinced that they have found a leader with the experience to ensure the continued growth of CIVICUS. For more information go to [Civicus website](#).

Education and Professional Development

Assessing Effectiveness - the "Metrics" Debate

One of the questions that funders often ask is "how do we better assess our impact? Should we measure our results and if so, how?" An extremely thoughtful set of commentaries on the so-called "metrics debate" in philanthropy can be found in the current issue of [Alliance Magazine](#)

The introductory article by David Bonbright (which is reprinted in our Philanthropy News Summer Edition) suggests that one of the difficulties in choosing how to measure impact is the lack of a public marketplace for sharing information about effective philanthropic decision-making.

By this he means that there is relatively little infrastructure that enables funders to share their evaluation results and learnings easily and widely. There is no database, no website, no directory; nothing that interested third parties can rely on to identify the best performers.

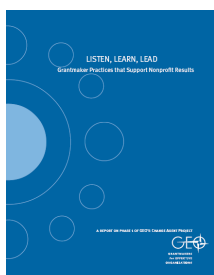
Geo Change Agent project producing valuable, practical resources for Funders

Grantmakers can only succeed when the nonprofits they support achieve meaningful results. Today, pioneering grantmakers are breaking down the barriers standing in the way of nonprofit success. Dissatisfied with the status quo, these change agents are revolutionising grantmaking practice.



Geo's aim is to provide more grantmakers with the resources, ideas and connections they need to make the greatest contribution to the nonprofits they invest in. They are producing a series of reports through their change agent project.

Here are details of their first two publications, both of which can be downloaded free from their website, www.geofunders.org



Listen, Learn, Lead:

Grantmaker practices that support nonprofit results. This report on Phase 1 of GEO's Change Agent Project delves deeper into what is necessary to instill change in grantmaking practices to ensure nonprofit success. Profiles of individuals and their foundations that are exemplars are also included.



Imagine, Involve, Implement:

The findings from Phase 2 of GEO's Change Agent project, which outline and examine the necessary steps to change the approach of grantmakers and their organisations. A compilation and analysis of 25 interviews, which draw conclusions and synthesize them in four crucial steps for grantmakers looking to transform their practices.

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 maximise 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, and An Insiders Guide to Grantmaking are available from Philanthropy New Zealand for \$40.00 each including GST and postage. Orders can be sent to info@philanthropy.org.nz

Joel will also be a keynote speaker at Philanthropy New Zealand's 2009 Conference, Te Papa, March 18/19 2009.

How can the nonprofit Board Chair and the CEO work together productively?

The relationship between the nonprofit Board Chair and the CEO is arguably the most important relationship in the organisation. There have been many instances, both public and anecdotal, where this relationship has broken down, usually with either the CEO resigning (literally or "euphemistically"), or the Chair resigning or not being re-elected. In turn, this whole issue can be debilitating for the organisation, its reputation, and the loss of focus at a strategic and operational level. This issue is discussed in The Conscious Chief Executives e-zine latest edition. The E-zine provides chief executives and senior leaders of nonprofit organisations with regular updates on issues and insights related to leadership, governance, strategy and risk. For more information about senior level relationships visit

http://www.conscious-governance.com/Conscious_Chief_Executives_ezine-Feb08.html

GEO action guide examines grantmakers role in supporting next generation leadership

A perception that nonprofit work is often underpaid and extremely demanding on personal time makes it an unattractive option for many. Perhaps the outcomes would be more positive if individuals didn't have to choose between financial security, work-life balance and their passion for social change.

GEO's recent work in the area, condensed in the form of an action guide "Supporting Next Generation Leadership", suggests that grantmakers seriously take such concerns on board and ask themselves what might they do so nonprofits have flexible, sustainable resources to make this issue a priority? One way could be providing increased levels of general operating support, or capacity building grants that will enable nonprofits to support the development needs of second tier leaders. Promoting workforce diversity is another strategy by which grantmakers can help grantees scour talent as well as create a more attractive work place.

For more recommendations, and to find out about what some of your peers may be doing to overcome the leadership challenge, download Supporting Next Generation Leadership.

EVENTS

Maori in Philanthropy Hui

Date: Thursday June 12 2008

Venue: Te Papa

Hosts: Ngai Tahu

More details to follow. Mark your diaries.

Engage Your Community: Using Blogs, YouTube & Other Cool Tools to Achieve Your Group's Goals
Waikato 2020 Communications Trust, a voluntary organisation dedicated to helping the community benefit from computer technologies, will hold this one-day conference, on **Tuesday April 22 2008**.

Engage Your Community is to be held in the Waikato Management School of the University of Waikato, Hamilton. It will include a series of practical workshops led by experts and community group leaders



who are currently using these tools.

Sample topics include:

- building a basic website or blog (and having it online by the end of the day!)
- how to get ongoing support and ideas for improvement
- how to collaborate with members using a “virtual office”
- case studies of how model community groups are using wikis, blogs and/ other tools.

You can also help shape the conference and make sure it meets your organisation’s needs by completing a quick online survey. Go to:

http://www.surveymonkey.com/s.aspx?sm=mHPRzISOKz76dk1_2fhIMKzg_3d_3d.

By completing the survey, you can also go into the draw for two \$50 Farmer’s vouchers. For more information please visit the website: www.webguide.net.nz/engage-your-community. You can also contact Ted Zorn, chair of Waikato 2020 Communications Trust, at (07) 838-4776 or email at tzorn@mngt.waikato.ac.nz

Philanthropy Australia Conference

Date: 16/17 October 2008

Venue: Sofitel, Wentworth, Sydney

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

Philanthropy New Zealand Conference ‘09

Date: March 18 and 19 2009

Venue: Te Papa, Wellington

Philanthropy New Zealand can confirm leading author and educator Joel J. Orosz as a keynote speaker at the ’09 Conference. Joel is the author of 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

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