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News

Greetings from the Philanthropy New Zealand office!

Last week I attended the Council on Foundations Leadership summit in Washington DC themed on 'Leadership, Partnership and Impact.' The meeting was billed as a Global Summit with several thousand participants from the US (over 3000) and several hundred attending from outside the US. It was an attempt to have a global 'conversation' - with a global diversity of views expressed at the opening and also at many of the plenary sessions. There were certainly many 'big words' and encouragement to be reflective on issues such as: the unique opportunities of philanthropy - how philanthropy has the opportunity to do so many things that governments and others cannot. Much of the thrust was aimed at '**are we making a difference**' - what are the areas to make a difference in and how best to make the difference and know we are doing this. It was interesting to hear there was caution at times, about thinking that suggests that we can 'measure all that's important'. There was some comment that the philanthropic sector may have become overly concerned in recent years with 'measurement and impact', 'cause and effect.' However; this discussion was constantly overlaid with questions in presentations such as 'are we making a difference' and 'how do we know?' Is the private tax benefit resulting in a large enough, sound public benefit? There was comment on many occasions about philanthropy not being able to 'do it alone' - the scale of the resource does not allow it - on our own we may not necessarily achieve all we hope we will - moving from co operation to collaboration - with all sorts of possible partners was discussed or referenced often." *To achieve deeper impact we must take active leadership roles and partner with each other across silos, philosophical differences and borders.*" Partnering was a strong reoccurring theme - though not for the sake of it but to deepen impact.

Some of the major questions addressed included:

- What is our vision for philanthropy in the 21st century?
- How do we meet standards for leadership and partnership - across borders - in partnership with the private or public sector (this issue was addressed often - the notion of the need for all sorts of partnerships, sometimes with those we might not naturally partner with).
- How do we enhance the impact of philanthropy, so that we are making philanthropic investments that change society for the better?

I found the sessions illuminating, rich in content and often highly participatory - with excellent content and well informed discussions and dialogue following the presentations.

As an overall comment on reflection much of what was being addressed, in many different ways, was about being **deeply intentional** in our work - thinking deeply - sharing information in manner that

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~ Email: info@philanthropy.co.nz ~ Website: www.giving.org.nz ~

Events

He koha manaaki i te Ao Māori - Philanthropy in te Ao Māori

Thursday June 12, 2008
Te Papa Tongarewa,
Wellington

Regional Funders Forums
24th June - 4th July
Nationwide



facilitates growth and learning for all partners (and therefore feeds back into learning about granting or other support) and being sure about what it is we are trying to achieve, committing to this and then developing work that reflects that strategic vision. Critical reflection and working on multiple fronts (with grants as one of those fronts, but not the sole one) were interesting/ challenging discussions. There was certainly some excellent presentations and discussion of about global issues such as climate change/the environment, poverty, human rights, inequities, improving the lives of others and diversity.

There will be a fuller write up of some of this summit in the Winter edition of the Philanthropy News.

GEO's Courtney Bourns to attend Regional Funders Forums

Philanthropy New Zealand will host Courtney Bourns, Director of Programs for Grantmakers for Effective Organisations (GEO), at a number of Funders Forums around New Zealand. Building on last year's success Philanthropy New Zealand has organised a series of Regional Funders Forums between 24 June and 4 July 2008.

The focus of the forums is to hear about the GEO's Change Agent Project and its findings of how grantmakers can be more responsive to grantseekers. This is an opportunity share our own knowledge and experience about such issues, as well as learning from innovative examples and looking at opportunities for improving practices.

We are delighted to be able to host Courtney. GEO is highly regarded for its action learning approach, leadership development and commitment to supporting not for profits to be effective organisations. Last year, Kathleen Enright, GEO Executive Director, gave a stimulating keynote presentation at our Philanthropy Matters Conference.

We are able to host Courtney with support from the Office for the Community and Voluntary Sector and the Department of Internal Affairs.

The following dates and locations are planned - though several have yet to be confirmed.

Monday June 23	Whangarei -TBC
Tuesday 24 June (10 - 12.30)	Hamilton - Confirmed
Wednesday 25 June	Auckland TBC
Thursday 26 June (10 - 2.00pm)	Rotorua - Confirmed
Friday June 27	Auckland - alternate date TBC
Tuesday 1 July (Noon - 4pm)	Dunedin - Confirmed
Wednesday 2 July (PM)	Wellington - Confirmed
Thursday 3 July (PM)	Christchurch - - Confirmed

We will be updating our [website](#) with further information on times, SSVP details and venues. Invitations are being sent out regionally but if you are interested please [contact us](#) and we will add you to the mailing list for invitations. For further information about GEO see www.geofunders.org

Law Changes to Provide Tax Certainty in Lead-up to Charities Registration Deadline

The government has announced it will introduce legislation to ensure that state-funded tertiary education institutions, state and integrated schools, and non-resident charities do not have to register with the Charities Commission to retain their tax-exempt status. They will also introduce a transitional measure, to be used in limited circumstances, to protect the tax-exempt status of organisations that run into difficulty with completing their registration applications before the Charities Commission deadline of 1 July 2008.

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Tertiary education institutions

The Income Tax Act and the Estate and Gift Duties Act will be amended to clarify that tertiary education institutions are exempt from income tax and from gift duty. It will apply to institutions set out in the Education Act: universities, polytechnics, specialist colleges and wananga.

State and state integrated schools

The Estate and Gift Duties Act will be amended to provide that gifts to state and state integrated schools are exempt from gift duty. They will also have automatic IRD-approved donee status, so that people who make cash donations to them will continue to qualify for tax rebates.

State and state integrated schools do not need to register with the Charities Commission to be exempt from income tax because they already have a specific exemption in the Education Act.

Transitional matters

The proposed legislation will also amend the Income Tax Act to provide a limited discretion for the Commissioner of Inland Revenue to preserve the tax-exempt status of charities that were not able to register with the Charities Commission within the deadline but can prove they began the process of preparing their application before deadline.

That measure is to provide greater tax certainty to organisations that run into difficulty in preparing their applications, owing to circumstances that may be beyond their control. It is intended to be used on a limited basis and will not apply to organisations that merely have not got round to applying for registration before the deadline. More details of these changes can be found at www.beehive.govt.nz

Payroll Giving given the go-ahead

The Government will proceed with the introduction of a voluntary payroll giving system next year. This will enable people to donate to charitable and philanthropic causes through work-based payroll deductions.

Complementary changes will clarify and simplify the law on how reimbursements and honoraria paid to volunteers in the non-profit sector are to be treated for tax purposes, thus removing long-standing problems and associated compliance costs for volunteers.

Philanthropy New Zealand says putting payroll-giving into action in New Zealand workplaces should bring about a stronger culture of giving and generosity. Executive Director, Robyn Scott, says giving in a planned manner will now be much easier. "Payroll Giving means many working New Zealanders will be able to give money to their chosen causes and receive an immediate tax benefit by way of a PAYE credit.

Philanthropy New Zealand is also pleased to see the government has put the review of imputation credits to charities - a long standing anomaly - firmly back on the agenda.

"These initiatives are vital to building better communities. Anything that means New Zealanders are thinking more about their giving and making regular contributions to an organisation doing great work benefits society as a whole."

Robyn says that internationally, payroll-giving schemes have shown to be a simple, convenient and effective way of supporting charities. "Australia and the United Kingdom have introduced payroll-giving schemes, which have created benefits for the businesses involved as well as the charitable organisations receiving funding," she says.

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Robyn points to overseas research, which shows payroll-giving benefits business by:

- Boosting their social responsibility profile
- Enhancing community involvement programmes
- Improving staff recruitment and retention

Another plus is the clarification of law relating to the taxation of honoraria for voluntary work and the reimbursement of volunteers' expenses. Robyn Scott says volunteers are an integral part of New Zealand society, "so it's great to see the Government working to make life easier for them and the organisations they assist."

SPARC Appoints New Chief Executive

Peter Miskimmin has been appointed head of Sport and Recreation New Zealand (SPARC). Miskimmin joined SPARC in November 2006 as general manager sector development after 17 years at New Zealand Post. Miskimmin brings a wealth of experience as an athlete, administrator and coach. A former captain of the New Zealand hockey team, he played 150 test matches for New Zealand. He is a New Zealand Academy of Sport carded coach and has coached the Wellington Men's National League Hockey Team since 2003.

He's been a Board member of the New Zealand Olympic Committee, the New Zealand Sports Foundation and SPARC as well as Chairperson of the Athletes Commission. He has also been President of the Olympian Club of New Zealand since 2000.

In the media release announcing his appointment, Miskimmin identified forming new partnerships with other investors in the sports sector, such as community trusts, gaming trusts, and local councils, as a critical area of work, "to ensure we are collectively investing resources into the appropriate areas." SPARC is the Crown entity responsible for promoting, encouraging and supporting sport and physical recreation in New Zealand. For more details, visit www.sparc.org.nz.

Growing Up in New Zealand

A new longitudinal study focusing on children growing up in New Zealand in the context of their families has been launched. The study called, Growing up in New Zealand, is designed to get high quality information about children and their families. It will provide non-identifiable data to help government and other agencies develop evidence-based policies to improve the lives of children. It will begin work in February next year with the recruitment of 7,800 pregnant women and their partners from the Auckland, Counties-Manakau and Waikato District Health Board areas.

Growing up is the first New Zealand long study to recruit participants from before birth and include children from all ethnic groups. It will involve people from rural and urban areas, and across the full socio-economic range. Researchers will interview women and their partners in a variety of traditional and non-traditional family situations - a contemporary reflection of modern New Zealand families.

The Growing Up in New Zealand team is a multidisciplinary group of researchers lead by Dr Susan Morton of the University of Auckland, in collaboration with Otago, Massey and Victoria Universities. They say they are very fortunate to be able to build on the internationally respected Christchurch and Dunedin longitudinal studies begun in the 1970s. Their groundbreaking work is an invaluable legacy to this project, as it provides the Growing Up team with the opportunity to compare child development between the two generations.

Growing Up says they will gather the most complete set of information to date about being a 21st century New Zealand child. For more information visit www.growingup.co.nz



Guidelines for Working with Refugee Background Communities Released

A set of guidelines, Standards for Engagement, has been produced by the ChangeMakers Refugee Forum to help NGOs, Government agencies and communities work well together. These standards are intended as a practical guide that can be used to assist the relationships, discussions and actions of people working in this area.

Refugee background communities no longer want to be treated as the passive subjects and receivers of policy development and services. They are becoming more involved in the development and delivery of the policies and services that affect them.

The standards for Engagement are divided into three parts:

- Principles and Common understandings
- Standards
- Indicators of Success

One of the purposes of the Standards for Engagement is to draw attention to the potential “power” relationships that exist when the various groups work together, to recognise the imbalance and, if possible, to address it in an appropriate way. You can get a copy of this document in electronically at <http://www.goodpracticeparticipate.govt.nz/key-sectors/engaging-ethnic-communities.html>.

Hard Copies can also be ordered by emailing changemakers@crf.org.nz or ph the ChangeMakers office, 04 801 5812. ChangeMakers is happy for it to be distributed widely but request you cite them as the author if you pass it on.

Update from the Charities Commission

Registration Update 29 April

Charities registered: 4,990

Processing time - registration analysts are currently reviewing applications received from 30 January 2008.

Directly from the Commission: If you don't hear from us straightaway after receiving confirmation that we have received your application, don't be concerned. We are concentrating all our efforts on processing applications as they reach the front of the queue, so you may not hear from us until you are registered.

If we need further information from you, or when we have processed your application, we will be in touch.

Beyond Registration - Wider role of the Commission

At the Charities Commission we are tasked with two separate but interlinked fields of work. The first is to provide a registration and monitoring system for charities in New Zealand. The second is to provide support and education for charities.

In our first two years of establishment, it has been the first field of work that has necessarily occupied the majority of our time and resources. This is because charities need to be able to access charitable tax exemptions from Inland Revenue after 1 July 2008 and because registration collects the information needed to identify and provide relevant services and assistance in the future.

We are now starting to shape the Commission's future role and functions. As a part of this process, a range of developmental work is underway. This includes developing a strategic plan with a view longer than that outlined in our 2007- 2010 Statement of Intent. It also includes preliminary work to guide the development of education strategies to assist the charitable sector's governance and management; developing a focus for our ongoing role of monitoring charities; and initiating research against which public trust and confidence in the sector can be benchmarked.

If you'd like to read The Charities Commission's full update please visit www.charities.govt.nz.

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Education and Professional Development

Geo Change Agent Project Producing Valuable, Practical Resources for Funders

Grantmakers can only succeed when the not for profits they support achieve meaningful results. Today, pioneering grantmakers are breaking down the barriers standing in the way of not for profit 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 not for profits they invest in. They are producing a series of reports through their change agent project.

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 instil 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.

Both publications can be downloaded free from their website, www.geofunders.org. Geo's Courtney Bourns will be discussing this project at regional funders forums nationwide in June & July. Venue details in the Events section of this In Touch.

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.

Joel Orosz 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.



Events

He koha manaaki i te Ao Māori - Philanthropy in te Ao Māori

Nau mai tauti mai, ki tēnei hui ki te whiriwhiri whakaaro mō **Te Koha Manaaki i te Ao Māori**, me te ara ā muri ake nei.

What does philanthropy mean to Māori? What is Philanthropy New Zealand's role in supporting this? Philanthropy New Zealand and Te Rūnanga o Ngāi Tahu, The Ngāi Tahu Fund invite all those associated with Philanthropy New Zealand to this hui to share views, and hear the views of others on Philanthropy in the Māori world. Speakers include; Sir Tipene O'Regan, Linda Smith, Moana Jackson, Kevin Prime and Jennifer Gill.

Date: 9:00am - 4.30pm, Thursday June 12, 2008

Venue: Te Papa Tongarewa, Wellington

Hosts: Te Rūnanga o Ngāi Tahu, The Ngāi Tahu Fund and Philanthropy New Zealand

Please RSVP: Philanthropy New Zealand before Friday May 23, 2008 by: e-mail: info@philanthropy.org.nz or ph: 04 499 4090

Please note: Catering and venue costs will be covered by Philanthropy New Zealand. Your advance registration is important to us and an indication of your commitment to attending the hui. Nō reira, tēnā koutou, tēnā koutou, nāu mai, tauti mai.

Canterbury Funder Network

Date: Thursday May 22

Time: 3.30 - 6pm

Venue: Latimer Hotel.

RSVP: info@philanthropy.org.nz

We will begin with tea and coffee and complete the meeting with a glass of wine and nibbles at 5.30pm.

The meeting will be facilitated by Garth Nowland Foreman and we will be focussing on '**Some Major Changes in the Funding Landscape for Canterbury**' - an great opportunity to reconnect with other funders and catch up with developments and changes that have happened since our last meeting in 2007, and talk through implications of some of these changes for the future.

Please feel free to pass this on to others (trustees or staff) that you know in the grants funding area in Christchurch who might be interested in meeting with other community funders.



Regional Funders Forums

The following dates and locations are planned - though several have yet to be confirmed.

Monday June 23	Whangarei - TBC
Tuesday 24 June (10 - 12.30)	Hamilton - Confirmed
Wednesday 25 June	Auckland TBC
Thursday 26 June (10 - 2.00pm)	Rotorua - Confirmed
Friday June 27	Auckland - alternate date TBC
Tuesday 1 July (Noon - 4pm)	Dunedin - Confirmed
Wednesday 2 July (PM)	Wellington - Confirmed
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Courtney Bourns, Director of Programs at Grantmakers for Effective Organisations (GEO) will discuss GEO's Change Agent Project and its findings on how grantmakers can be more responsive to grantseekers. There will be an opportunity share knowledge and experience as well as learning from innovative examples and looking at options for improving practices.

We will be updating our [website](#) with further information on times and venues. Invitations are being sent out regionally but if you are interested contact us and we will add you to the list. For further information about GEO see www.geofunders.org

Charities Commission Workshops

21 May, 9.30-11.30am or 1-3pm, Onehunga Community Centre, 83 Church Road, Onehunga.

22 May, 10am-Midday or 2pm-4 pm, Western Springs Garden Community Hall, 956 Great North Road.

23 May, 10am-Midday (followed at 12.30pm by online application "lab", facilitated by the Auckland City Council), Wesley Community Centre, 740 Sandringham Road, Mt Roskill.

To book any of these workshops, contact Jan Ziegler- Peri at Auckland City Council on (09) 354 2033

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 18th and 19th 2009

Venue: Te Papa, Wellington

Leading author and educator Joel J. Orosz has agreed to present a keynote speech 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