



# Philanthropy New Zealand

Topūtanga Tuku Aroha o Aotearoa

PO Box 1521 - Wellington - New Zealand - Phone: (04) 499 4090 - Fax: (04) 472 5367  
Email: [info@philanthropy.org.nz](mailto:info@philanthropy.org.nz) - Website: [www.philanthropy.org.nz](http://www.philanthropy.org.nz)

## **Bulletin No 27 September 26<sup>th</sup> 2007**

### **NEWS**

**Farewell to a Great New Zealand Philanthropist and Leader**

**Economic value of Non Profit Institutions Measured**

**Simplifying the Grant Process and more ...**

### **EDUCATION AND PROFESSIONAL DEVELOPMENT**

**Philanthropy Matters Conference Proceedings Available Online**

**2008 Emerging Leaders International Fellows**

### **UPCOMING EVENTS**

**National Funders Forum**

**Sustaining Social Innovation Forums and more**

### **NEWS**

#### **Farewell to a Great New Zealand Philanthropist and Leader**

It is with great sadness that Philanthropy New Zealand marks the passing of one of New Zealand's most remarkable philanthropic leaders and our patron, Sir Roy McKenzie.

Sir Roy, 84, died in Wellington after a long illness.

Sir Roy spent his life giving to the New Zealand community, not just in terms of grant making activity but also in the personal support and guidance that he provided to countless Community and Voluntary Sector organisations.

Sir Roy truly embodied philanthropy – believing it is not just about giving, it is also about a generosity of spirit. New Zealand is much better off as a result of Sir Roy's philanthropy.

Sir Roy served on the J R McKenzie Trust Board for over 40 years and set up two other grant making bodies: the McKenzie Education Foundation and the Roy McKenzie Foundation, both of which were renowned for their innovative approaches to supporting community activities.

His support, both grants and personal support, were often directed at issues that were before their time or even unpopular. He could see beyond the immediate towards what would be good for the future of our communities.

He was prominent in developing and supporting organisations, such as the Outward Bound Trust, Women's Refuge, NZ Council for Educational Research, Birthright, Te Omanga Hospice, and others.

He was also credited with working towards professionalising philanthropy in New Zealand, with the Roy McKenzie Foundation becoming the first grantmaking trust to employ professional staff and to send both staff and trustees on sabbaticals. He helped establish Philanthropy New Zealand and was our patron for many years.

Sir Roy was knighted in 1989 for his services to education and the community.

He will be greatly missed by the philanthropic sector and the community and voluntary sector. But his life's work will carry on in our communities every day and for that we will always be grateful.

### Economic value of Non-Profit Institutions Measured

For the first time, comprehensive information about the economic contribution of non-profit institutions in New Zealand is available, in a recently report released by Statistics New Zealand. The Non-profit Institutions Satellite Account: 2004 also features information on the income and expenditure of non-profit institutions, the economic value of volunteering for these institutions, and profiles of each of the twelve activity groups that non-profit institutions are classified by.

Non-profit institutions contributed \$3.64 billion or 2.6 percent to New Zealand's gross domestic product (GDP) in 2004. Over one million (1,011,600) volunteers gave more than 270 million hours of unpaid labour to non-profit institutions in 2004. When valued at a market wage, the value of this voluntary labour increases the economic contribution of non-profit institutions to \$6.95 billion or 4.9 percent of GDP. This is similar to the contribution of the entire construction industry.

The largest economic contribution from non-profit institutions was from the social services group, which includes services for the disabled, food banks and counselling services. Private education and research such as kindergartens, private schools or industry training organisations also made a large contribution, as did grant makers and fundraisers such as the community trusts and gaming trusts operating poker machines.

Australian non-profit institutions reported a similar economic contribution to New Zealand institutions, at 4.7 percent. Similar information has been released internationally for only seven other countries. This international work was initiated by the United Nations Statistics Division and Johns Hopkins University (Baltimore).

Statistics New Zealand has also released an abridged publication, QuickStats About Non-profit Institutions in New Zealand, which presents the highlights of the main report. Both publications are available from the [Statistics NZ website](#).

### Financial Reporting Standards Update

The Ministry of Economic Development have still not released their discussion document on appropriate financial reporting levels and the Financial Reporting Act requirements, although a certain amount of work has been done on this document.

There has however, been an announcement that there will be no mandatory requirement for small and medium sized charities and other not-for-profit entities to comply with NZ IFRS.

This will be a temporary (2-3 year) relief until the MED review can be completed during which time there will be the chance to contribute to the development of appropriate financial reporting standards for the sector. We will try to keep you updated with developments as they occur.

---

### Update from the Charities Commission

#### Reappointment of charities commission board members

We are pleased to announce that the Minister for the Community and Voluntary Sector Hon Luamanuvao Winnie Laban has reappointed three of the Charities Commission's board members for a second term of three years.

Appointees are Frank Claridge, Ian Calder and deputy chair Judith Timpany (also a Philanthropy New Zealand board member), who between them have a wealth of professional and volunteer experience in the community and the charitable sector.

The appointments of the other four board members will be reviewed at different times to ensure we always have experienced people on our Board. To view the profiles of our board members visit <http://www.charities.govt.nz/about/board.htm>.

#### Tips from our registration analysts

Incorrect or incomplete applications cause delays and re-work. To ensure your application gets through the process as quickly and easily as possible, we urge you to check your application carefully before sending it in or submitting it online to us.

Here are some issues our registration analysts would like applicants to be aware of:  
*Only approved, final versions of the forms are acceptable* – some people are sending in draft copies of the application forms or designing their own versions. These will not be accepted by the Commission.

*If you are already registered with the Companies Office your “legal name” is the full name you are already registered under* – The “legal name” of your organisation that you write on your application form must match the full name you are registered under with the Companies Office if you are already an incorporated society, incorporated as a board under the Charitable Trusts Act, or a company.

If you're not sure about anything, check our online help (i.e. FAQs and 'Tips for applying', and 'Fact sheets' – all links from [www.charities.govt.nz](http://www.charities.govt.nz)), or email [info@charities.govt.nz](mailto:info@charities.govt.nz) or call our free information line 0508 242 748.

For the fuller version of this update go to the [Charities commission website](http://www.charities.govt.nz)

### Simplifying the Grant Process

In March, funders, researchers, and practitioners in the U.S. non profit sector met at Harvard to examine initiatives that support organisational capacity building, financial health and enhanced programme performance among nonprofits. The target audience was funders and the outcome of the symposium (which has been captured in a recently released report), included a set of funding principles to improve delivery support to nonprofits.

A survey of symposium participants and of members of Grantmakers for Effective Organisations (GEO) yielded six areas of strong agreement:

1. 90% of respondents see the need to simplify grant applications and reporting in order to make grantee effort commensurate with grant size and scope.
2. 79% said that most grants should have fewer line items and other restrictions.
3. 83% said that foundations should increase the size and length of grants, even if that means fewer nonprofits are supported.

4. 70% agreed standardisation with other funders of grant applications and reporting is advisable.
5. 94% said that foundation relationships with grantees should change from oversight to partnership.
6. 89% said that foundations should jointly decide with grantees on evaluation tools and metrics.

The survey shows that many in the funding community – at private foundations, intermediaries, and government – are increasingly embracing new ways to fund an effective social sector.

The symposium report, [Capital Ideas: Moving from Short Term Engagement to Long Term Sustainability](#), highlights promising practices that are well within the reach of most funders. Ideas such as sharing data and existing metrics, streamlining reporting or sustaining and pooling funding for longer term impact.

---

## EDUCATION AND PROFESSIONAL DEVELOPMENT

### Philanthropy Matters Conference on the Web

The proceedings from Philanthropy New Zealand's Philanthropy Matters conference is now available for viewing via an internet website, free of charge.

Over 300 people attended the conference earlier this year. They benefited from the wisdom and experience of some of the world's foremost philanthropic thinkers and other sector leaders, from New Zealand and overseas. As promised they tackled the pertinent questions facing our sector from their perspectives. You can now watch these presentations at your leisure.

Click on this link to take you directly to the Philanthropy Matters conference page.  
<http://www.presentationcentral.co.nz/mediasite/viewer/?cid=6cc4f5fb-c14f-4be4-bf01-870c20235390>

You will need to use Internet Explorer. The site may ask for a password and user name. You should be able to use the same password and user name you use to log in to your computer network.

**2008 Emerging Leaders International Fellows**

The Center on Philanthropy and Civil Society is accepting applications to the spring 2008 Emerging Leaders International Fellows Program through to October 2, 2007.

This is a rare opportunity for Third-Sector practitioners from overseas to spend 3 months in New York City to network, study and reflect!

The program provides leadership training through applied research and professional mentorships for young scholar-practitioners in the nonprofit sector.

This year's program will focus on the topics of community foundations, as well as corporate social responsibility and diaspora philanthropy.

Apply Now !! Visit the Center's website [http://philanthropy.org/programs/intnl\\_fellows\\_program.html](http://philanthropy.org/programs/intnl_fellows_program.html) for more information and an application form.

---

**UPCOMING EVENTS**
**National Funders Forum – Sharing the Learning**

**Date :** Tuesday 27th November 2007

**Venue:** Telstra Centre, Te Papa, Wellington

**Time:** 9.00am – 4.30pm (coffee from 8.30am)

The Philanthropy New Zealand AGM will follow the forum. The theme is "sharing the learning". We've brought together an inspiring group of presenters to share their expertise, experience and knowledge, including:

Fiona Ellis from the Northern Rock Foundation, Bob Wyatt from the Muttart Foundation, Canada Cindy Kiro, the Children's Commissioner Fay Freeman, Rochana Sheward and Zarleen Blakely about the SCOPE project

A wide range of topics will be covered in concurrent workshops, including funding for youth, refugees and migrants, and parenting programmes; understanding consumers' attitudes to giving; and assurance options.

The National Funders Forum provides an excellent opportunity for funders to get together and network both regionally and nationally. There's time to share examples of best practice and hear about what's happening around New Zealand in the grantmaking and philanthropic sector.

We will be sending out more detailed information about the forum in the next few weeks, including the programme for the day. Interest for this event is high and numbers are limited. Early registration is encouraged. The cost for this event is \$75 per person.

**Register now!**

Contact Philanthropy New Zealand by email: [info@philanthropy.org.nz](mailto:info@philanthropy.org.nz) or ph: 04 499 4090 .

**Sustaining Social Innovation Forums**

More and more changemakers want to get at the roots of social problems. They are frustrated by our limited success at dealing with long term social problems. They realise that making poverty, abuse, homelessness or exclusion, history will require strategic thinking and acting.

The JW McConnell Family Foundation; DuPont of Canada and the PLAN Institute have launched a two year exploration to learn from social change initiatives that are leading or have led to profound change.

Led by the PLAN Institute and Vickie Cammack; JW McConnell's Katharine Pearson and PLAN's Al Etmanski have been consulting with changemakers in Canada and the US.

These changemakers are very strategic and intentional about large scale social change. They realise that sustainability is bigger than the viability or sustainability of any one organisation, enterprise or innovation. More information on sustaining social innovation can be found on [PLAN's website](#)

Vickie and Al will be speak the following forums in November:

**Auckland Funders Forum****Date:** Tuesday November 13**Time:** 3.30 - 5.30 ( Beginning with Tea and Coffee and time for networking).**Venue:** Barrycourt Conference Centre, Gladstone Rd, Parnell

RSVPS please e-mail Serena at

[StandardsPlus@imaginebetter.co.nz](mailto:StandardsPlus@imaginebetter.co.nz) stating which region you are from.**Rotorua Regional Funders Forum****Date:** Wednesday 14 November**Time:** 1- 4 pm**Venue:** Rotorua District Council

Vickie and Al will be speak from 1 – 2pm.

Questions from 2-2.30, refreshments for 30 mins, and then just a general discussion between Rotorua regional funders from 3-4pm, as to where we want to go from there, what next, topics for future forums etc.

Any enquiries phone Alison Perrin from the Rotorua Energy Trust on 07 347 6239 or

[Alison@rotoruatrust.org.nz](mailto:Alison@rotoruatrust.org.nz)**Canterbury Funders Network****Date:** Thursday 15 November

Details to follow but any enquiries or rsvps please e-mail Serena at

[StandardsPlus@imaginebetter.co.nz](mailto:StandardsPlus@imaginebetter.co.nz) stating which region you are from.**COMVOICE Parliamentary Breakfast****Date:** Tuesday 20<sup>th</sup> November**Venue:** Parliament

More details to follow but any enquiries or rsvps please e-mail Serena at

[StandardsPlus@imaginebetter.co.nz](mailto:StandardsPlus@imaginebetter.co.nz) stating which region you are from.**Charities Commission Annual Meeting Venues**

Details about the programme will be provided closer to the dates.

**Wellington**

Monday 19 November, 2pm - 4.30pm

National Library of New Zealand Auditorium

Corner of Molesworth and Aitken Streets (street level entrance on Aitken Street)

**Christchurch**

Wednesday 28 November, 2pm - 4.30pm

Canterbury Horticultural Hall

Hagley Park South, Riccarton Ave

**Dunedin**

Thursday 29 November, 2pm - 4.30pm

Dunedin Public Art Gallery Conference Room

30 The Octagon

**Auckland**

Monday 3 December, 2pm - 4.30pm

Fickling Centre

546 Mt Albert Road, Three Kings

**Tauranga**

Tuesday 4 December, 2pm - 4.30pm

Bureta Park Motor Inn, Redwood Room

Vale Street, Otumoetai

**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  
Philanthropy New Zealand*