

## **Grantmaking with Integrity**

**Kevin Prime and Bev Gatenby**

### **Presentation by Bev Gatenby**

When I first took up my current role of Chief Executive for Trust Waikato, now just over 5 years ago, a couple of things happened early on, which encouraged or challenged me to think about how I would see myself as a “funder” and how I might be in the position in a way that felt both safe for me and safe for the communities we serve through the Trust.

The first was that my then chair, Hori Awa, told me that being a funder was like being a “walking dollar sign”. The second was that as I walked in to a meeting of other funders and community development workers one day, the facilitator at the front said to the whole group “oh, the big money’s arrived”.

I was shocked and dismayed at being positioned not as a person, but as “money”. In various paid and voluntary roles I had worked with a range of funders, some of whom I had found terrific conversation partners, others of whom I had possibly stereotyped as too powerful and in need of “schmoozing” to get their support for the work I believed needed doing in the community. Like many people in these roles, I also came in with some ideas about how the Trust might be more responsive to community groups and communities. I knew there were some different possibilities for how I might “be a funder”. (I note that most people call both me and Trust Waikato a “funder” so that is the term I am using.)

I have also drawn on earlier learnings as a middle class Pakeha woman, with an academic background, committed to social justice in this country, including honouring the promises of the Treaty of Waitangi. Some of those learnings I have drawn forward to my current role to articulate what it means to have integrity as a funder here and now.

I am advocating for an ethics of funding which is part of who and where we are in Aotearoa New Zealand. Like Bruce Sievers, I see our role in philanthropy as “part of the give and take of social agenda-setting”. We are “civic actors among other civic actors” (Bruce Sievers, “The holy grail of impact”, *Alliance*, March 2010, 15:1). This is a personal think piece offered as part of the conversation about how we think about integrity as funders.

Some years ago I completed a doctorate in which I had the opportunity to work alongside a group of staff in Anglican Action in Hamilton, as they established Cross Rose Centre, a residential service for women and children rebuilding their lives. The method of my research was based on principles learned from feminist, participatory and action researchers – a commitment to researching with people, rather than on people, a commitment to improving the lives of women, a valuing of community knowledge, an agreement that through our conversations, reflections, analysis of power and relationships we might work towards a more just world.

One of the places I arrived at personally was a commitment to “living my life as inquiry”. This commitment is now part of how I think about integrity in this role. So what does it mean to live life, or to live funding as inquiry?

Being an inquiring funder means **not** being an expert. It means being informed and thoughtful. It means listening and asking questions. It means working with communities and community groups to figure out together how we want our world to be and what work we might do towards that.

Part of living my life as inquiry, is a commitment to “holding knowledge lightly”. I am not a great believer in truths, facts or proof. I am suspicious of any current orthodoxy or taken for granted “truth” about how we should do philanthropy. It is always worth remembering that we will believe a new orthodoxy, a new “truth” in 5 or 10 or 20 years time and worth remembering that most orthodoxies are too simple and tend to be coopted to preserve current injustices.

For example, I have noticed over several years now that we are urged repeatedly not to “just respond to what comes through the letterbox” but to be “more strategic” often by funding fewer, larger projects. Of course, we all believe we are being strategic whatever it is that we are funding – it’s just that our strategy might be different than that of others. And what comes through our letterbox in the shape of donation applications is in itself part of the conversation we are constantly engaged in in figuring out what we mean our communities to be. At their best, those applications tell us what it is that local people think is important in their local communities, and what they have energy and passion for. Being responsive is in itself an intentional strategy. **And** at the same time, we ought also to be seeking other information and conversations, beyond what is in application forms, about our communities and the world we want to live in.

I worry that the current focus we have on evaluation is leading to an overreliance on the knowledge of researchers and experts, sometimes at the expense of the knowledge of local communities.

I am thinking carefully about our current focus on impact and outcomes. Like Sievers in a recent *Alliance* article, I suspect the concept of “impact” to be an “empty shell”. I think the idea that we can attribute “outcomes” to our funding often oversimplifies the complex social, cultural, political and economic world in to which we place what are actually relatively small sums of money. The philanthropic dollar we distribute does not in and of itself create social change. People exhort us to focus on outcomes as if we have all just been going to our offices each day, vaguely puttering around hoping that something might change, though we were never really sure what that might be. Of course, the conversations about outcomes may also be very important and meaning-full conversations.

Living life and funding as an inquiry also requires reflexivity. Reflexivity involves both working in cycles of reflection and action and always analysing how power is operating. Power happens in funding through the everyday systems we operate. It happens in the way that we talk and don’t talk, in the systems we establish for inviting, receiving, assessing, recommending, approving or declining applications, in how we think about accountability, in every day and every way we work. Sometimes our systems exclude people.

To be reflexive, we need to think more about the historical and political context in which we work. We need to talk more about what it means to be involved in philanthropy, what Bruce Bonyhady

calls “the child of great inequality”, an inequality embedded through individual, corporate and nation-based wealth.

We need to think about our relationship to government. How do we think about philanthropy in a time of growing inequality in a modern democratic country, a democracy which is different to that of the US, UK and Australia? How do we be more than an amelioration of poverty, inequality and injustice? How can we contribute to policy, advocacy, social change and action that shifts injustice? We need to maintain a healthy tension with government and the community and voluntary sector – a plurality of voices sometimes in support, sometimes raising questions.

Currently, I am deeply concerned that community groups are being expected to solve complex, issues in our communities (an example would be child abuse) which have arisen out of decades, even centuries of political, social and economic systems. And when community groups don't provide the solutions, they are then also identified as the problem.

Reflexivity also requires that we acknowledge who we are and where we come from, both as individuals and organisations. What are our identities and how do they underpin our work?

In my case, I am Pakeha with all the privileges and challenges that brings. Some of the best (and probably the worst) things in this country happen in the negotiated space between Maori and Pakeha. As a funder I try always to be mindful of that space. I have been taught to be neither too proud nor too deferential as Pakeha. It's a lesson I take with me as a funder – be neither too proud nor too deferential with community groups and communities, but be an intentional and respectful participant in community conversations and relationships as together we create our world.

Trust Waikato is one of the 12 community trusts created out of a community banking movement. I have thought a great deal about our whakapapa as a source of community-based (as opposed to family or corporate) philanthropy. The capital fund for which we are the caretakers, or kaitiaki, came from the savings of the people of our communities. Their families, whanau, descendants and forthcoming generations are the people we continue to serve through the donations of the Trust and our care of that capital fund.

Philanthropy is a creative act; with others, we are part of the social act of creating our communities. For me, having integrity as a funder means a commitment to inquiry, to reflexivity, to intentional conversations about what we mean by and want for communities in this wonderful country. I am interested in the conversations we might continue to have about our integrity as funders.