

Collaboration at Work: Todd Foundation Partnership Funding

A conversation held at the Philanthropy NZ conference, April 2011

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1. **Kate: Intro to Todd Foundation and Partnership Funding:**
 - a. Private family funder, grant budget around 4m
 - b. Deeply committed to funders and community organisations working together – eg one of our principles is "working together to change lives for the better"
 - c. Todd's Partnership Funding is a specific example of working together closely
 - d. Genesis = research in 2008 stating that to maximise community impact, funders need to:
 - i. Impose fewer restriction on how funding is used
 - ii. Provide more multi-year funding
 - iii. Build better relationships with grantees
 - e. So why not:
 - i. Provide substantial 5 year funding to selected recipients whom we already have good relationships with and trust
 - ii. Tell them they can use it for any purpose that helps achieve their vision
 - iii. Get them together annually to share what they are learning
 - iv. Provide additional match-funding for PD
 - v. Assist with research and evaluation frameworks

2. **Corrina: Introduction to WestREAP and the Early Literacy Project**
 - a. Westland Rural Education Activities Programme based in Hokitika with a satellite office in Greymouth and Outreach services in South Westland and Grey Valley districts.
 - b. Early Literacy Project involves tutors working in homes with whanau to help parents read to their pre-schoolers and develop preschool literacy skills, previously funded by Todd Foundation.
 - c. Met with 3 other related Todd Foundation grantees in a workshop to discuss Early Childhood Education
 - d. Together formed a vision of "*Families Love to Learn*" to describe successful ECE.

3. **Kate: How we set up Partnership Funding and selection process:**
 - a. Put in a business case to trustees, comparing grant-making to business investment. You don't buy shares in Telecom then tell the CE you can only spend my money on buying photocopiers – why do we treat the community sector differently?

- b. Pool of 300k per year was set aside, 3 – 4 recipients per year, maximum grant 100k, reducing amounts in years 4 and 5. Creates a forward commitment of 1.2m
- c. Selection process = pre-qualify through desk research, invitation to selected and related previous recipients, proposal and presentations to trustee sub-committee – with all applicants in the room together

4. **Corrina: Selection process**

- a. what was it like applying, eg coming together in same room to present proposal
- b. Competitive? Collaborative? Elements of both.
- c. Process of engagement – how can we work together? Includes establishing common ground, eg vision and goals
- d. Funding was shared between the four organisations invited to apply – no-one missed out due to Todd Foundation having done research prior to inviting. Some of us predicted this outcome, others didn't.
- e. The whole premise is relationship based, focus is on collaboration rather than compliance. Eg:

Relationship based	vs	Compliance/Accountability Mandate
- Unstructured		- Structured, binding, little room to move
- Flexibility		- Inflexible
- Trust		- Level of bureaucratic control
- Outcome focused (qualitative)		- Target driven (quantitative)
- Discussions, learnings		- Reports, no feedback or feed forward
- Responsive		- Reactive

5. **Kate: How it is Partnership Funding working two years down the track?**

- a. Still very much a work in progress
- b. Two active cohorts: 2009 “Families love to learn” group of 4 and 2010 “Youth transitions” group of 3.
- c. Quarterly telehuis, annual face-to-face hui
- d. Everyone keen and engaged, and recipients taking the lead in things like organising the annual hui
- e. Still experimenting with things like the best way to report and evaluate success
- f. Have not yet had any concerns with any recipients, but it could happen and we need to be ready for this

6. **Corrina: How it is working two years down the track:**

- a. Face-face meetings annually – can learn about each other's initiatives as well as the bigger picture of what each provider does; narrative report annually.
- b. Excellent opportunities to share practice when meeting annually, can learn from each other (peer review), use info for developmental purposes.

- c. Works when everyone pulls their weight
- d. We are operating as a family
- e. More interaction and flexibility with this model
- f. Even though traditional models of funding require up to six-twelve reports annually, doesn't necessarily translate for automatic quality outcomes.
- g. Relationship based funding investment and management allows for innovation and real learning- ie: having a relationship based model is likely to generate a better quality outcome overall because it's developmentally, future focused, not backward looking. Process is fluid and flexible.
- h. Need to guard against complacency

7. SUMMARY – 2 Key Learnings

Kate:

- Larger time commitment than originally thought – changes from up-front time selecting who to fund to ongoing time walking alongside.
- Trustees like this way of working/funding because they can be much more engaged eg attending the hui, presentations etc.

Corrina:

- From a community organisation perspective, now we can make a long term investment in what we do by having a long term funding stream/commitment. (Makes it easier for strategic planning, recruitment/retention, making changes etc).
- Provides confidence and continuity.
- Long term funding commitment can provide an excellent leveraging opportunity to source Government or other funding for long term sustainability of worthwhile initiative.

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