



Lifting our aspirations

Stories of strategic philanthropy
in Aotearoa and beyond

The potential of strategic philanthropy

We asked the leaders we interviewed, what is the potential of strategic or thoughtful generosity? Here is what they shared.

'Being strategic gives greater chance of success - there is urgent need and we need the **system level change**.'

Gael Surgenor, The Southern Initiative

'When thinking about the tool of **impact investment**, this has the potential to shift the dial on intractable issues.'

Terri Eggleton, BayTrust

'Strategic philanthropy offers a flexible, long-term, **collective model** and that is crucial when addressing the problems we are trying to solve.'

Jenn Chowaniec, Wayne Francis Charitable Trust

'I fundamentally believe being **strategic** is how we are going to make change.'

Lani Evans, Vodafone NZ Foundation

'To really make a difference requires us to **move beyond our role as grant maker** and use every tool we have access to.'

Fred Blackwell, San Francisco Foundation

'We tend to not use the word philanthropy in our engagement with whānau and that is intentional - the potential is for a **new paradigm** to emerge.'

Porsha London, Tokona te Raki

'A more **targeted approach** enables focus on a particular issue - with GIFT the aim is to improve the mauri or life force of the Hauraki Gulf.'

Peter Tynan, Foundation North

'We are putting the majority of our resources into this way of operating and see huge potential in this approach. That said, I believe you need all **different types of philanthropy**.'

Teya Dusseldorp, Dusseldorp Forum

‘A more **thoughtful approach** has the potential to tackle some of these complex issues; that includes holding up the mirror to the system we are part of - philanthropy.’

Iain Hines, Peter McKenzie Project

‘Strategic philanthropy can look at the core root and **work alongside community** to find it’s own solutions.’

Seumas Fantham, Todd Foundation

‘The opportunity is about focusing on real impact that is sustainable, scalable and **rewires the system** itself.’

Eruera Tarena, Tokona Te Raki

‘Strategic philanthropy means different things to different people. Impact investment is one tool and it begins to change the model of philanthropy by creating a **reciprocal exchange**.’

John McCarthy, The Tindall Foundation

‘We have seen over the last forty years, that despite the philanthropic funding going in, most of the social and environmental issues we care about have worsened - We all have to **try doing things differently**.’

Christina Howard, Todd Foundation

‘Philanthropy is uniquely positioned to leverage, augment, and **take chances** on things that could be real game changers.’

Emily Tow, The Tow Foundation

‘Change needs to happen across the whole system and we have to **ask questions** in philanthropy about how we can change too.’

Seri Renkin, tenzo Foundation

‘Strategic philanthropy has the potential for transformational change, can be underpinned by values drawn from Te Ao Māori (such as kaitiakitanga) and can enable us all to **lift our aspirations**.’

Jan Hania, NEXT Foundation

Nāu to rourou,
nāku te rourou,
ka ora ai te iwi

With your food basket and my food
basket the people will flourish

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Foreword

Tēnā koutou katoa.

Aotearoa New Zealand is a land of opportunity, success, challenge, failure and hope.

We rate third in global giving indexes for generosity and Credit Suisse's annual Global Wealth Report lists us as a comparatively rich country based on wealth-per adult data. We have a strong foundational document in Te Tiriti o Waitangi, tell stories of indigenous success, and take pride in our sporting, arts and cultural achievements. We can point to climate change efforts.

However, discrimination sees New Zealanders disadvantaged when it comes to areas like education, employment and health. We've breached Te Tiriti and colonisation shows the impact of discrimination on tangata whenua. We have unacceptable child and domestic violence rates.

Philanthropy is an influential contributor to this mixed picture, alongside Government, business and community. The philanthropic, or giving sector, is also a major reason for hope.



Philanthropy includes individuals donating money, statutory trusts, family foundations, corporate contributors and social enterprise. Iwi are significant givers. The types of giving vary, from more traditional generosity that alleviates symptoms (such as feeding a hungry child) through to strategic giving to change the system (so no more children go hungry). It extends beyond giving with the sector increasingly impact investing and undertaking social procurement.

While all these types of philanthropy have their place, *Lifting our Aspirations* highlights funders determined to change systems and have transformational impact. These types of organisations give us great hope for positive and lasting change.

This publication features skillful and tenacious funders learning from our system failures, believing in the opportunity, and rising to the challenges. Thanks to these funders for sharing their stories, learnings and tips.

The NEXT Foundation is respected for its strategic philanthropy, particularly in education and the environment. We acknowledge the NEXT team for this publication, as sharing the stories of thoughtful funders grows effective generosity.

And growing effective generosity is a vital ingredient for Aotearoa having even more successes, hope and opportunity.

Ngā manaakitanga,

Sue McCabe
Chief Executive Philanthropy New Zealand,
Tōpūtanga Tuku Aroha o Aotearoa

Introduction

Kia ora koutou, and welcome to *Lifting our Aspirations* - a collection of stories of strategic philanthropy from within and beyond Aotearoa New Zealand.

Alongside our goals in environment and education, NEXT has a further objective to enhance strategic philanthropy. It is our belief that being strategic and thoughtful in approach can amplify impact. For NEXT this means contributing more than money (offering skills, time and connections), focusing in specific areas and partnering around shared goals. It also means we are committed to learning and refining our practice.



In 2018 we published a NEXT Story on strategic philanthropy (you can find this in the Mediahub on the NEXT website). One of the insights from leaders we spoke with was the opportunity for storytelling as a tool to promote more strategic generosity. This formed the seed for this subsequent publication, *Lifting our Aspirations*.

The fourteen case studies here are ten local stories and four international (two from Australia and two North America). All the stories have connections in some way, shape or form to New Zealand. Throughout the publication there are insights on strategic philanthropy, including factors for success and what's being learned along the way.

Our aspiration is that *Lifting our Aspirations* may be a useful learning tool, and hopefully inspire more strategic philanthropy as a tool for positive impact in the world. Thank you to the leaders interviewed for your generosity and mahi, and to Sue McCabe at Philanthropy New Zealand who wrote the thoughtful Foreword. I'm conscious there are many more stories we could have told, and wish to acknowledge those stories too.

And a huge thank you again to Annette Culpan for being the inspiration, the thought leader, the energy and the worker in telling these stories. Annette, your passion for thoughtful giving shines through on every page.

Please feel free to share *Lifting our Aspirations* with others, and as always we welcome your feedback.

Ngā mihi nui,

Bill Kermod
CEO NEXT Foundation

The Tindall Foundation

CASE STUDY

Changing the affordable housing system

STRATEGIC INSIGHT

Impact investment can change the game
for social change

01

ABOUT THE FOUNDATION

The Tindall Foundation (TTF) was set up by Margaret and Stephen Tindall, with the money from the public float of the Warehouse in 1995. Half of the donations go towards initiatives that support children and whānau. Central to the ethos of TTF is generosity with minimal strings.

In the affordable housing arena, TTF has chosen to partner with the New Zealand Housing Foundation (Housing Foundation), since its formation in 2003.

'The challenge was to find a model of housing development at scale that was affordable for low-income families.

There was an approach from Brian Donnelly at Housing Foundation, with an idea about how housing could be made more affordable. The Trustees knew and trusted Brian from his previous involvement in a group of social entrepreneurs that TTF had brought together.' John McCarthy, TTF

'Housing needs are significant and diverse in New Zealand. We need a hell of a lot more and we need to be innovative around funding models. That speaks to how you do social investment large scale.' Brian Donnelly, Housing Foundation

APPROACH AND TOOLS

The primary tool TTF has used to create system change in affordable housing is impact investment. TTF has supported Housing Foundation through its rent to buy and shared ownership models. About \$2 million has been invested via grants (largely operational funding early on) and \$10 million in loans or long-term mortgages, that has been used as development finance for housing developments. Housing Foundation has been able to show commercial lenders (ie banks) that they have an investable proposition. TTF gets its money back plus a social return.

Impact tools include

- A long-term strategy, 'the Trustees have been doing this for 16 years and will be in it for quite a bit longer,' and, 'TTF has been there all the way through, from building horse power to coming on the full journey'
- Grants and impact investment, 'TTF investing first proved it could be an investable proposition for others'
- Thought leadership and trialing investment options, 'they are thought leaders'
- Building a partnership and high trust relationship, 'TTF is a long-term genuine partner. They bring credibility, ability to leverage and provide us with thought leadership, confidence and support'



The Tindall Foundation partners with the New Zealand Housing Foundation.

- Advocating for this model with government, Council, philanthropy, commercial channels and others, 'a lot of this advocacy is behind the scenes'
- Recognising the mahi of Housing Foundation at TTF 20th anniversary, 'they received a recognition award, they are doing incredibly good work'
- Supporting a longitudinal study, 'this ties well into the governments thinking, it links back to wellbeing outcomes'
- Providing communications advice via TTF, 'Liz Tindall has provided communications advice to Housing Foundation'
- Understanding the eco-system for affordable housing in Aotearoa

'TTF has actively supported in thought leadership and trialing social capital and investment funding options. The difference with TTF is they have supported through different forms of funding – developing capacity, working capital for projects, long-term loans to create a debt facility and right now we are trialing equity into a charity.' Brian Donnelly, Housing Foundation



Housing Foundation site at Waimahia Inlet community development.

'We have tried to make change in the housing, impact investment and finance system, and in the philanthropic system to encourage people to invest as well as grant fund. What this means is firstly maintaining a really up to date understanding of a system, who the key players are, the points of influence and where there is readiness to change. That readiness is important. So is building partnerships for collective action.' John McCarthy, TTF



A member of the Housing Foundation team hands over the keys at Orchard Street development.

ACHIEVEMENTS AND MILESTONES

Long-term support of Housing Foundation has seen a \$12 million investment from TTF giving credibility and confidence to others to invest – resulting in the building of over 800 houses with 150 low-income families having reached full ownership.

The Tindall Foundation's practical approach has paved the way for philanthropy. John McCarthy explains, 'It has been game changing. It's one of the first examples in New Zealand of philanthropy investing, rather than traditional grant making or giving a donation.'

Further achievements include supporting Housing Foundation to develop a range of financial models; and influencing changes in government behaviour to replicate the model, 'the government has announced support for a shared ownership pilot in Glen Innes.'

'Since we began we have housed about 800 households in new housing. Of those approximately 450 are in home ownership programmes and of those about 150 have moved through to full independent home ownership.' Brian Donnelly, Housing Foundation

'The Tindall investment has given the Housing Foundation leverage to go to banks and other commercial lenders. Housing Foundation has now built confidence with other funders including commercial funders. That has enabled them to scale. The \$12 million Tindall Foundation investment has been leveraged into about 800 houses or \$350m worth of assets. If our Trustees had simply grant-funded \$12 million, they wouldn't have been able to achieve anywhere near this.' John McCarthy, TTF

LEARNINGS AND ADVICE

John McCarthy would like to see other social housing providers picking up on the Housing Foundation model. 'They seem to have gone more down the path of providing long-term rentals, rather than long-term home ownership. That's useful, but home ownership is also a pathway out of poverty. For The Tindall Foundation supporting the Housing Foundation is as much about ending poverty as it is about building houses.'

He observes the importance of stable policy and the potential role of government. 'Housing developments are expensive long-term propositions, so need stability of policy and finances for investors and developers to take risk.'

Learnings from the affordable housing experience include the 'critical' importance of values alignment and trust; being patient and in it long-term; and taking a proactive, problem-solving approach.

Advice to others included

- 'Get cracking'
- Find an issue your Trustees are passionate about; investigate how an impact investment approach may complement grant making; and bring some of your wider networks to the table

- Understand these investments can be hugely successful, but like any investment, sometimes fail
- Talk to others and ask for help, 'there is a small but growing group of people, developing expertise in impact investment'

'This was TTF's first significant go at impact investment. We have made our balance sheet work for good outcomes, for social impact. Other philanthropy organisations are looking at how they can do that as well. To me it's part of the future of philanthropy.' John McCarthy, TTF

WHAT'S NEXT FOR TTF

The future challenge for TTF in affordable housing is 'how you scale to other regions', encouraging the government to make the shared ownership model part of its housing programme and for more commercial lenders to see shared ownership as a valid housing model. Also developing the investment models the Housing Foundation has on offer, so it can bring in a broader range of funders.

'Brian and the Housing Foundation - they are such humble people, they just get on with it. Recently, TTF has agreed to put another \$5 million into a housing 'portfolio' fund - a mix of rent-to-buy and shared ownership. It's being used to effectively share the equity in houses with families.' John McCarthy, TTF

tindall.org.nz

www.nzhf.org

The San Francisco Foundation

CASE STUDY

The San Francisco Foundation's work to protect, preserve and produce affordable housing in the Bay area

STRATEGIC INSIGHT

Use all the tools in the tool belt

02

ABOUT THE FOUNDATION

The San Francisco Foundation (SFF) is a community foundation set up in 1948 with the goal to inspire and facilitate philanthropic giving in the San Francisco Bay area. It has \$US 1.3 billion dollars in assets under management. In recent years, SFF has sharpened focus and has a 'north star' of racial and economic inclusion. The Bay region is the second most diverse region in America with 58% of the population being people of colour.

SFF has three pathways to equity - people, place and power. Central to approach is recognition that solutions must be authentically connected to community. Housing affordability is an area where all parts of SFF strategy interrelate.

'The San Francisco Foundation was established by a group of civic leaders who were visionary and social justice oriented in nature ... the work we are doing around racial equity and economic inclusion builds on that legacy and is responsive to the social justice issue of our day. We have vast amounts of opportunity and wealth here in the Bay area and access to that can be limited to people based on race, economic status and geography.' Fred Blackwell, San Francisco Foundation



APPROACH AND TOOLS

Housing is an issue of regional inequity in the Bay area. Housing prices and rents have increased at a rate that far exceeds income levels, and people on the lower end of the ladder end up paying a higher proportion of their income on housing, 'the further you go down the economic ladder, the more extreme burden you see.' The most visible manifestation of this becomes homelessness – a critical issue in the Bay area. SFF made the decision to deploy all the tools in the tool belt in support of affordable housing.

Impact tools include

- Advocacy for better rent controls, to bring more public dollars to the table and to mobilise voices
- Loans to cities and non-profits for affordable housing developments through their impact investment programme, 'the endowment can be a facilitator of outcomes around racial equity.' Loans include pre-development costs, site acquisition and housing development
- Civic leadership and social capital - Fred Blackwell SFF CEO Co-Chairs the regional group that comes up with policy oriented housing solutions
- Relationships to convene and bring others to the table, including the unusual suspects. For example in 2019 Bay Area community and faith leaders, housing advocates, business leaders, and philanthropists launched a regional public-private housing partnership that will build one of the country's largest investment funds to address the regional affordable housing crisis
- The Partnership for the Bay's Future aims to advance the region's future by solving its interconnected challenges of housing, transportation, and economic opportunity. It was launched with the support of the San Francisco Foundation, the Chan Zuckerberg Initiative, the Ford Foundation, Local Initiatives Support Corporation (LISC), Facebook, Genentech, Kaiser Permanente, the William and Flora Hewlett Foundation, the David and Lucile Packard Foundation and Silicon Valley Community Foundation

- Grants supporting non-profit housing development and to groups that are advocating for better policy, 'production and protection of vulnerable residents'
- Grants are made via an open grants cycle and proactive shoulder tapping. SFF has largely migrated to an approach that provides full multiyear support and larger grants (previously it was the 'peanut butter' approach)

'Our story is one that started with focus on racial and economic inclusion and quickly got us to the point we realised housing was an important part of the equation. So much so we thought it was important for us to deploy all our tools in the tool belt ... To us system change means that really government is operating in a way that supports our objectives around equity. So that is why we are funding advocacy, that is why we use our own voice around advocacy as well so we can see legislative changes, policy changes that support what we are trying to achieve.' Fred Blackwell, San Francisco Foundation

ACHIEVEMENTS AND MILESTONES

Success is measured in terms of the number of affordable housing units produced and the number of people able to stay in their homes and not be displaced. Through deploying all the tools SFF has been able to achieve much more than would have been feasible through grants alone. For example, an investment of USD\$500,000 in advocacy for (including outreach to voters) helped create a climate that led to a \$2 billion investment in affordable housing.

'This more strategic approach has enabled us to achieve impact at a level or scale that would have not been possible with just grant making alone. Here in the Bay area one unit of affordable housing can cost north of \$500,000. For that same level of investment in policy and advocacy, we have been able to see and encourage probably \$2 billion of public dollars in affordable housing – by investing in polling, investing in advocacy at the local level, putting initiatives on the ballot and using bonds for affordable housing production as well.'

Affordable housing is an issue in the San Francisco Bay area.





LEARNINGS AND ADVICE

SFF shared what it is learning including that solutions must be connected to community; the importance of advocacy and policy change; that tackling housing is an expensive endeavour and it takes time to achieve change and build political will; and being optimistic is key to success, 'We are glass-half-full kinds of folk, we continue to work hard and are optimistic.'

Advice to others included

- Be bold enough to make a difference, yet plausible enough to be achievable
- Tackling these issues and achieving impact requires philanthropy to move beyond the traditional role of grant maker
- Engage the community being served in shaping strategy
- Share learnings and successes

WHAT'S NEXT FOR SFF

SFF is in a dynamic partnership with the public and private sector to advance bold policy solutions; is raising substantial money to invest in the affordable housing system; and raising awareness regarding the importance of dealing with the issue at scale in the region.

'Tackling the issues that we are trying to tackle and being effective at achieving impact and really making a difference – it totally requires us to move beyond our role as a grant maker and use every tool that we have ... there needs to be more receptiveness and comfort with taking risks and being bold with our actions. Finding ways for folks to share what they are learning and achieving. At a global level of scale, creating those kinds of venues. And making sure that as we move forward as a group, that we incorporate the wisdom and expertise of the communities that we help positively in the process of designing strategy and decision making.'

BayTrust

CASE STUDY

BayTrust's brave odyssey beyond granting

STRATEGIC INSIGHT

With impact investment you get an impact,
a financial return and your money back

03

WHAT IS IMPACT INVESTMENT?

Simply put, 'Impact investments have a measurable social and/ or environmental impact alongside a financial return.'
Terri Eggleton, BayTrust

ABOUT THE TRUST

BayTrust was established in 1988, following the sale of the Bay of Plenty Trust Bank. It is part of the community trust family. The Trust currently has \$220 million in assets, grants \$7 million per annum and exists for the benefit of Bay of Plenty communities. The region is diverse, culturally rich and faces complex social challenges. Housing 'is a big issue' right across the region. Following the global financial crisis (GFC) when returns were reduced and community need was 'higher than ever', BayTrust looked to impact investment (II) as another tool for social change.

'After the GFC our returns were impacted, therefore our grants budget was lower, but our community needs were higher than ever. That is when we started to look at how we could use our investments to contribute to targeted outcomes, particularly in the housing space. We wanted to use all the tools in the toolbox and when you look through that lens, we had at that time over \$150 million in investments. Our view is utilising some of these investments to create social impact is something every trust like ours should seriously explore.' Alastair Rhodes, BayTrust

APPROACH AND TOOLS

BayTrust believes that by freeing a portion of the balance sheet for purpose-focused investment, outcomes in the Bay of Plenty community can be strengthened. Plus you can recycle the capital.

Impact tools include

- Thinking long-term, having focus and drawing on a suite of tools such as II

- Focusing investments strategically on environment, housing and economic development
- Investing for five-plus years at a time (while maintaining flex)
- Building the pipeline for investable propositions via a toolbox fund (for capability building and research)
- Advocating for II and influencing other foundations and investors to join the movement
- Utilising a proven tool to measure impact

ACHIEVEMENTS AND MILESTONES

An impact investment approach has enabled BayTrust to find solutions for social housing and support economic development. Loans to community housing provider Tauranga Community Housing Trust (TCHT) has enabled 17 social housing units to be developed; and the purchase of pensioner flats from a Council - reducing the rental cost new tenants are paying. Further milestones include creation of more than 60 jobs through investment into a bond with Ruapehu Alpine Lifts. The bond (similar to a loan) provides a minimum return with opportunity for a higher return if the venture is successful in attracting additional tourist visitors.

Other milestones are introducing investment-experienced staff to the team; building II into Trust strategy (allocating up to 10% of the portfolio); developing due diligence processes and policies; and implementing an impact measurement tool. The Impact Management Project tool is one of the industry standards for assessing impact, this takes 'a feeling about an investment and puts a numerical figure around it.' Investments are assessed on impact, financial return and risk.

'In the future for-profit organisations in the commercial world will need a stronger social license to operate and not for profit organisations will become more commercially sophisticated. Social enterprise and impact investments are going to start merging those worlds. It is system change.'
Alastair Rhodes, BayTrust

LEARNINGS AND ADVICE

Learnings along the way include the importance of having investment experienced staff; starting with lower risk 'deals' while developing confidence and policies; in time including some risk in the portfolio; the importance of being proactive and not 'sitting on your haunches'; completing deals takes time; being flexible and not limiting investments by organisation structure (charity, Māori land trust, LLC and others); and when you put in a grant it's 100% financial loss – with II, 'you get an impact, a return and your money back'. Also, now there are II products/funds in the market (such as Purpose Capital) it's easier to get started.

Advice to others included

- Be brave and 'dip your toe in the water' - start with something simple such as investment in housing
- Be pragmatic about financial returns
- Have clear policy, outline the level of investment relative to total portfolio and what you hope to achieve
- Do due diligence on the business side and the impact side
- Talk to others who have done it
- Ask yourself if there are needs not being serviced through granting and how could they be met utilising II
- Invest in the eco system, including supporting organisations to become investment ready

'If you want to do this, you really need to make a commitment to the eco system. New Zealand is at least ten years behind other key countries in relation to impact investment, however if we all start working on this together we can catch up fast and become a leader, particularly if you think about opportunities to invest alongside iwi.' Terry Eggleton, BayTrust

WHAT'S NEXT FOR BAYTRUST

BayTrust has various deals in the pipeline and plans to extend their investments in the housing space. The goal is to invest \$12 million within two years into II and in time grow the allocated percentage of the balance sheet. And encourage others to dip their toe in the water.

'To me the system change is if we could get all the other trusts in New Zealand to invest a portion of their funds in impact investment that would have a huge change in the impact investment and social enterprise eco system. It's one step at a time.' Terri Eggleton, BayTrust

www.baytrust.org.nz

BayTrust investment in Ruapehu Alpine Lifts has supported economic development in the region.





The Tow Foundation

CASE STUDY

Transforming the justice system

STRATEGIC INSIGHT

A learning tour is a great place to start

04

ABOUT THE FOUNDATION

The Tow Foundation (Tow) was established in 1988 by entrepreneurs Leonard and Claire Tow. It envisions a society where all people have the opportunity to enjoy a high quality of life and have a voice. The Tow Foundation has \$US 220 million in assets and grants approximately \$19 million per annum. The organisation focuses on medicine, education, culture and justice.

Leonard Tow remains actively involved at age 91, his three children and two of his grandchildren are on the Board and his daughter Emily Tow is president. The Foundation will continue to operate as long as direct descendants of the family are engaged.



The Tow Foundation Justice Initiatives seek to transform the justice system. Photo credit: Rich Freeda.

'The Tow Foundation was set up by my parents. They came from humble beginnings and benefited from free higher education in the City of New York, at Brooklyn College. They were fortunate enough to start a business that became successful. They wanted to help others find success, experience joy and make a difference. That is the guiding philosophy. They were successful building businesses that were high risk high return opportunities and have applied similar tactics in their philanthropy.' Emily Tow, *The Tow Foundation*

APPROACH AND TOOLS

Justice was an area of particular interest to Leonard and Claire Tow's children. This aspect of Tow's work is characterised by advocacy, collaboration and strategic investment for system reform.

Impact tools include

- Learning from and convening stakeholders in the justice arena ('system leaders, prosecutors, defenders and people impacted by the system'), asking where the problems and opportunities are, and where a private foundation may help
- Being insights led. 'By meeting these advocates, we learned there was no one place stakeholders could meet and work on system reform. From this we helped found the Connecticut Juvenile Justice Alliance, along with three advocacy agencies'
- Listening to those with lived experience of incarceration. 'We rely on them for insights, they understand what true reform would mean'
- Putting relationships 'at the core of everything'
- Collaborating on legislative reform - supporting coalitions and networks, including public/private partnerships
- Strategically focusing on justice reform in Connecticut, New York and nationally
- Having clear priority areas, from reform of the juvenile system to promotion of college in prison and leadership development for the incarcerated. 'They are becoming the leaders of the systems they came out of'

- Supporting partners with long-term, unrestricted funding. 'We have been with some organisations for over a decade'
- Offering communications training and investing in communications to raise awareness of the issues

'I have an entrepreneurial board who always wants us to do better and push ourselves – I did an enquiry with the organisations we are supporting, to find out if there was an area in social justice where we could really make a difference. We went out on a learning tour and that is how we got invested in the juvenile justice system. We convened groups from all different parts of the field. People in the courts, prosecutors, defenders, and others. We asked them where they thought there were opportunities, problems and where a private foundation could be helpful. That is how we decided where to invest.' Emily Tow, *The Tow Foundation*

ACHIEVEMENTS AND MILESTONES

Emily Tow believes 'there are lots of ways to measure success' – individual outcomes; lives transformed; people moving into leadership roles; movements created; and policy, legislative and system change.

Milestones include being a founding member of the consortium that formed the Connecticut Juvenile Justice Alliance and through this achieved various legislative reforms (such as raising the age of the juvenile system in the State from sixteen to eighteen, 'changing the system for tens of thousands of young people'); supporting a movement nationally to raise the age to eighteen; eliminating incarceration of children who had not committed a crime; supporting the advocates who worked to eradicate the sentence of juvenile life without parole; and supporting formerly and currently incarcerated people with higher education, leadership development and training. 'We fund a group of public health fellows who are getting their masters or working at the New York City Health Department.'

'We were a founding member along with three advocacy organisations and helped establish the Connecticut Juvenile Justice Alliance. We have had all kinds of legislative reform as a result of this group. I always look at that experience as the single most important turning point in our history for how we viewed our role and what the possibilities were and having real impact with our investments.' Emily Tow, *The Tow Foundation*

LEARNINGS AND ADVICE

Humility, learning and enquiry are part of Tow's DNA. 'We have become experts in this area through a deep sense of curiosity and openness to learning.'

Learnings include that system reform requires high-trust relationships, coalitions and insights from those with lived experience; investments are only as good as the people who know and care about the issues – supporting solution oriented story telling can enhance the change; and this type of work requires patience.

Advice to others included

- Start small, experiment and 'do a convening'
- Augment and experiment – Take a chance on something you are not sure about, but could 'be a game changer'
- Listen deeply and take a chance on people who might know more than you
- Reverse the traditional philanthropy role ('we can fix you') and instead ask 'what do you need?'

'We are learning every day. You have to be humble in this work. I feel if we don't make mistakes, if we just go in with sure bets, then we are not doing our job. – our board is interested in high risk high return potential and that means lots of failure.' Emily Tow, *The Tow Foundation*

Emily Tow. Photo credit Rich Freeda.



WHAT'S NEXT FOR THE TOW FOUNDATION

The Tow Foundation compass has its sights on expanding human dignity in the justice system; supporting more transformative experiences for incarcerated people 'to be leaders inside the walls or outside'; and elevating the voices of directly effected people.

'There are so many people in the system who have never been told they are valuable, that their lives matter. With a little encouragement people rise. If we move away from retribution and punishment and toward hope and belief in peoples ability to change and do better – that is how we will solve our addiction to the criminal justice system.' Emily Tow, The Tow Foundation

Todd Foundation

CASE STUDY

A place based approach to youth employment

STRATEGIC INSIGHT

Focus where there is a need, an opportunity
and willingness to work together

05

ABOUT THE FOUNDATION

The Todd Foundation, established in 1972, envisions an inclusive Aotearoa New Zealand where all families, children and young people can thrive and contribute. The Foundation is an expression of the values of the Todd family. Funding is enabled through an annual donation from the family owned Todd Corporation, as well as endowment income.

The Foundation has two main focus areas, including youth employment, following a 2014 review.

'We asked if there was one area we could make a big difference, what would that be? Youth employment is at the heart of a lot of this stuff. If young people can transition well to employment it helps alleviate other issues, such as housing and mental health.' Seumas Fantham, Todd Foundation

'We have a range of perspectives on our Board, including representatives from the Council of Trade Unions and Business New Zealand. They were all clear there was an issue for young people getting into the workforce, and our own research recognised that.. Starting with an initial \$400,000 pool, since 2016 we have invested \$2.8m in this area.' Christina Howard, Todd Foundation



Te Kaha students on tour to learn about careers in horticulture.

APPROACH AND TOOLS

The Foundation believes thinking about youth employment 'in a different way' and a collaborative, community-led effort, will achieve divergent results.

Impact tools include

- Digging into the research (including where youth unemployment was highest), building specialist knowledge, understanding what was working (and what wasn't, such as working in silos) and finding out what others had done, 'this took about a year'
- Being guided by principles for success such as utilising a 'whole of community youth to employment strategy (such as the Mayor's Taskforce for Jobs) leading to less fragmentation and more collaboration'
- Engaging proactively where there was a community identified need/opportunity, a willingness to work collectively and relationships that could be leveraged
- Focusing geographically in the regions of Lower Hutt, Eastern Bay of Plenty and Tairāwhiti Gisborne. In 2018 a fourth initiative was added in Taranaki
- Convening a series of regional hui. 'In Gisborne over 90 attended. The Mayor, young people, Iwi, employers, youth organisations and a professor from AUT. They brought different perspectives and agreed the issues up front. From that came ideas and a small group who wanted to move on it'
- Encouraging a joined-up community approach, 'It was the community deciding what they want to do'
- Supporting sustainability to ensure 'something would remain when we were no longer funding'. This includes a willingness to stay in the background, so there is room for others to step forward and support
- Funding flexibly and long term, 'our approach is to work with our partners to fund in the ways that work best for them' and be very flexible

- Asking 'what is the systems level change that needs to take place' including modeling a different approach and 'way of funding'; reducing silos; and looking at the conditions for success (especially changes in how parts of the local system work together)
- Being highly relational and bringing all the regional community partners together through hui, designed by community partners. 'They set most of the agenda, it is a safe space'
- Focused evaluation. 'The key thing for us is learning and supporting the community to iterate and make it better'
- Brokering with other funders. 'We can't do it alone and community can't do it alone'

'We spent over a year going out to communities, talking with thought leaders in the youth employment space, seeing what was out there (locally and overseas) and looking at different models. It can be complex as there are various stakeholders – from young people, to schools, employers and training institutes.' Seumas Fantham, Todd Foundation

'The first time we funded in the regions, we asked how we could support the community-wide strategies that had been developed. We asked people working within the strategy to tell us which elements Todd funding could best support, and asked for one proposal with support from a wide range of stakeholders. We wanted to see it developed and signed off jointly. We are encouraging coming together around the kaupapa. In each region we also said that we would make funding available for convening, capability and evaluation.' Christina Howard, Todd Foundation

ACHIEVEMENTS AND MILESTONES

Seumas of the Todd Foundation describes success as 'seeing more collaborative approaches, changes in the system and local funders picking up some of the proven programmes'.

Gains in the youth employment area include the Foundation developing specialist knowledge and relationships; understanding the bigger picture and levers 'to create a



healthier system'; all initiatives coming out of 'what the community has said they wanted'; identifying gaps (these may arise through community partner hui); and partnering with others to achieve change nationally. An example of this is the national collaboration on driver licensing.

Further achievements include a less competitive and more collaborative environment; seeing the License to Work programme (which has been picked up in three regions) iterate and improve; more employers coming on board and being engaged; the programmes demonstrating impact and being supported by other funders; increased perceptions of young people as potential employees. 'That kind of attitudinal shift is what we are looking for.'

'When we bring our groups together, often from those discussions there may be larger national system issues that arise, issues that can't be solved by any one group, funder or region working in isolation. We look at our networks to see what we can do. For example driver licensing. We are working in partnership with Vodafone, JR McKenzie, iwi, Philanthropy New Zealand and Mayors Taskforce for Jobs and community. We are utilising and leveraging our networks. We are listening to the community and utilising our social capital.' Seumas Fantham, Todd Foundation

'We understand success based on whether there are shifts happening in the system. When we went to the License to Work graduation in Gisborne, all of the schools were involved in that programme. At that graduation the kids and families were there, but what surprised me was the

number of employers who were there. The fact that they took time to be there to support the young people was so encouraging, especially because an early issue identified through a youth hui was that rangatahi felt that local employers did not want to employ them.' Christina Howard, Todd Foundation

LEARNINGS AND ADVICE

Todd Foundation has learned that factors for success include having both staff and trustees on board, 'it's a whole organisational shift'; knowing the research and landscape; having a glue/navigator role (on the ground) and resourcing that, 'when the rubber hits the road is holding the initiative'; core stakeholders must be involved; community buy-in and leadership is critical; as is being trusting and 'comfortable with messiness'. Seumas noted the challenge of how you share learning and the changing environment. 'I think real time mapping of progress is the way forward.'

Advice to others included

- Do some training in system change, learn from others (look locally and overseas), and recognise 'what part of the system you could focus on'
- Put the time and effort into 'really understanding' the areas you are interested in, and include people on the ground
- Make it as easy as possible for community partners - less bureaucracy, 'work in a way that supports the organisation to do the work, rather than meet your needs'
- Give it a go, and if it doesn't work that is okay, 'groups need a space and resources to explore'
- Don't go it alone, 'look for collaborations' (and at least inform others of what you are doing)
- Involve the people 'closest to the issues' in design, implementation and evaluation
- Become a funder that is responsive to community ideas that emerge along the way



Another happy graduate of the Ōpōtiki Community Driver Mentoring Programme.

'Often philanthropy wants to do good things and has good hearts, but there are experts of content and experts of context. The experts of context are those closest to the issue/potential. If you talk about youth employment it's young people and employers.' Seumas Fantham, Todd Foundation

WHAT'S NEXT FOR THE TODD FOUNDATION

Next on the youth employment trail is getting the Driver Licence collaboration humming; supporting License to Work at a national level; and on the bigger picture – their new change initiative Fairer Futures for Whānau and looking at the whole landscape of inequality.

'Who is benefiting the least from the current system? Their views are important. Include those groups.' Seumas Fantham, Todd Foundation

www.toddfoundation.org.nz

Wayne Francis Charitable Trust

CASE STUDY

Strengthening the Ōtautahi youth sector

STRATEGIC INSIGHT

System change requires enduring relationships
and a collective approach

06

ABOUT THE FOUNDATION

Wayne Francis Charitable Trust (WFCT) is a family foundation set up in 1999 by Wayne Francis. Wayne had been successful in business and, due to his experience as a parent, wished to contribute to the health and wellbeing of young New Zealanders. He chose to focus on young people in Ōtautahi Christchurch and cancer research.

'WFCT was set up 20 years by Wayne Francis in the months before his death. He had been affected by particular experiences in his life, such as his own health with cancer (that led to his death) and his son's suicide. WFCT has a priority to fund cancer research and a particular interest in the wellbeing of young people.' Jenn Chowaniec, Wayne Francis Charitable Trust

APPROACH AND TOOLS

The approach of the Trust has always been pragmatic, prioritising local knowledge and a 'can do attitude'. Its work in the Christchurch youth sector is focused, relational and strengths based to achieve a skilled, supported and connected youth sector.

Impact tools include

- Being involved in collaboration and partnership
- Being strategic, focused and listening to experts on the ground
- High trust relationships, funding fewer for longer, and being flexible, 'It's rare that we would tag funding'
- Being a connector, broker and catalyst
- Actively engaging in the projects - from governance, to critical friend, to strategist
- Bringing a learning approach, 'we have something to gain, not just something to give'
- Being brave, taking risks and contributing to system change
- Investing in leadership

Jenn Chowaniec runs a workshop at a Strengthening the Youth Sector Hui.



'The partnership between the WFCT and the youth sector here in Christchurch is significant. A lot of the work comes up through discussions at the WFCT Youth Advisory Group table around issues such as youth housing, employment and mental health. The Trust sits alongside and works with the sector. It is true collaboration.' John Harrington, SCOPE

'WFCT looks at it's own practice as well as the practice of the organisations it funds. The Trust has a Youth Advisory Group to help with decision-making. I could call anyone involved in the Trust and get their support, that is the nature of the relationship.' Penny Prescott, Canterbury Youth Workers Collective

ACHIEVEMENTS AND MILESTONES

An early marker of success was the development of the PYDA Framework (Positive Youth Development Aotearoa), which has influenced funders, youth organisations, Councils, and others – impacting policy, language, trainings and standards. This was co-created by the WFCT Youth Advisory Group. A systemic shift the Trust has been part of, is a shift to a cooperative and connected youth sector in Christchurch.

Further achievements include local youth workers being well supported via long-term partnership with Canterbury Youth Workers Collective; catalysing and co-creating the Strengthening the Youth Sector (SYS) cross sector collaboration following the earthquakes (this has five workstreams from the Youth Charter to the burgeoning Youth Voice Canterbury); journeying alongside Christchurch Youth Council from start-up to sustainability; the SCOPE review tool (supported by the Trust since 2006) being scaled nationally; supporting partner organisations such as Cultivate to become more commercial and sustainable; and bringing a relational approach to funder culture in Ōtautahi.

‘Something like SCOPE or the SYS project would not have come about if WFCT had not thought, ‘How do we strengthen the sector?’ It came about through connections and insights. The Trust has been instrumental in bringing that relational approach to funders here in Christchurch ... working together to come up with solutions.’ John Harrington, SCOPE

LEARNINGS AND ADVICE

The Trust has built up knowledge in relation to its enduring mahi in the youth sector. Factors for success include listening to those on the ground (experts and young people) regarding need; being comfortable in uncertainty;

Wayne Francis Charitable Trust works long-term to strengthen the Christchurch youth sector.





and being flexible to changing plans, 'you are responding to and sensing the environment.' And a strategic approach enables a long-term view 'that is critical when thinking about the problems that philanthropy is trying to solve.'

Other lessons include the challenge and complexity of 'being part of the work as well as the funder of the work'; when Trustees participate in projects their understanding deepens; when brokering with government and other funders the kaupapa must be well represented and well maintained; and when there is no application process there can be a perception risk 'that you just have to know us to get support.'

Advice to others included

- No one person can fix the system, 'you have to be prepared to go at the pace of the people doing the work ... 99% of the time it's slower than you may want'
- Be flexible with who you fund, 'don't be restricted to charitable entities'
- Strategic philanthropy is not for everyone, 'You have to invest in the time, the people, give away some control, build knowledge and embark on a learning journey'

'Something the Trust put emphasis on early on was the value of voices from the sector. There is so much we don't know. The way WFCT has approached that is through the relational approach (such as with the YAG and others), to review information regularly and be part of the conversation.' Jenn Chowaniec, Wayne Francis Charitable Trust

WHAT'S NEXT FOR WFCT

Next on the radar for WFCT is getting the concept of positive youth development more widely understood and breaking down silos between health, education and youth work, because they're all working with young people.

'The upcoming Festival for Youth Development is the first time there has been a Summit with the specific intention of bringing those sectors together. We participate in the planning, organising and funding of the event, and what comes next.' Jenn Chowaniec, Wayne Francis Charitable Trust

wfct.org.nz

The Vodafone New Zealand Foundation

CASE STUDY

Aiming to halve the number of excluded or disadvantaged young people in Aotearoa

STRATEGIC INSIGHT

Together Everyone Achieves More

07

ABOUT THE FOUNDATION

The Vodafone New Zealand Foundation has been operating in Aotearoa since 2002, and has invested more than \$30 million and countless hours of voluntary time in local community projects over the last 17 years. Focused exclusively on young people since 2007, the Foundation set an ambitious new strategic goal in 2017: to halve the number of excluded and disadvantaged young people by 2027.

The IDI (Integrated Data Infrastructure Statistics New Zealand) analysis collated by Treasury was the starting point for the Foundation's thinking. According to the IDI, there are more than 200,000 excluded and disadvantaged young people in New Zealand, defined as those who have had significant interactions with care and protection or the justice system, and for whom both employment and education are a challenge.

'We want all young people to have access to the resources and opportunities they need to thrive, but these things are not equally available. The young people we're focusing on have been let down by some of the systems and structures

that surround their lives and by underlying issues like systemic racism, poverty and inequity. Fundamentally, we need to do better and we believe that, as a foundation, with our unique resources, we can make a contribution to positive change. But this is big, complicated work and an ambitious goal and we know we can't do it by ourselves,'
Lani Evans, Vodafone NZ Foundation

APPROACH AND TOOLS

The Foundation plays to its strengths and focuses on funding innovation, collaboration and disruption, and on leveraging the power of Vodafone. The Innovation Fund is the Foundation's only contestable fund and has a focus on innovative forms of practice, with a technology lens. The Collaboration Fund supports long-term partnering for impact, such as the partnership with care experienced young people, The Tindall Foundation, The Todd Foundation, Foundation North and Oranga Tamariki that led to the development of VOYCE Whakarongo Mai – an advocacy agency that aims to ensure the voices of young people in care are heard and central to decision making.



The Disruption Fund aims to create the conditions for change and includes significant pieces of work 'behind the scenes', including developing an impact model that measures changes for young people over time, a Youth Accord to pull the philanthropic sector together and the refresh and strengthening of the Youth Development Strategy Aotearoa (YDSA).

The Foundation also leverages the Power of Vodafone's people, networks and technology. An example of this is the digital inclusion paper developed in partnership with Internet NZ that gave primacy to the voices of young people who have lived experience of digital exclusion.

Being strategic and engaging in thoughtful philanthropy is important if the Foundation is to achieve its goal of halving the number of excluded and disadvantaged young people in Aotearoa New Zealand.

Impact tools include

- Utilising the expertise of Vodafone employees and technology
- Advocating with Government – for example the Foundation made a submission to the Child Poverty Reduction Bill
- Convening community partners and bringing together traditionally siloed groups to work towards a common goal
- Focusing on research and filling knowledge gaps
- Creating the conditions for system change and working on complex and complicated systemic challenges

'The Impact Model is one of our big focus areas. If we're going to reach our goal, we need new and different mechanisms for understanding the barriers and drivers of exclusion and disadvantage, and how these move and change over time. We also need to understand what's already working well and where there might be gaps in thinking and service provision. We hope the Impact Model we're developing will make it easier for us, and other organisations, to see this landscape and use it as a tool for decision-making.' Lani Evans, Vodafone NZ Foundation

ACHIEVEMENTS AND MILESTONES

Taking a strategic approach has enabled the Foundation to build expertise, knowledge and 'most importantly relationships' in its focus area; create a network of skilled and passionate leaders 'that have strengthened the youth sector hugely'; develop an audacious ten year goal (and supporting strategies such as launching the NZ Youth Accord); and investing in a social impact model as a koha to the sector, to measure changes over time.

'The new strategy allows us to think big, broadly and long-term. Large scale change takes time and we now have a ten year funding lens that encourages us to be thoughtful, strategic and iterative in our practice and process. We can invest in areas that are complex and complicated, require multidimensional approaches and cross-silo partnerships; we can work on problems that take a long time and a lot of work to shift; and we can learn from our experiences as we go – we can be heuristic. The Foundation is in an incredibly privileged position – we have a strategically focused board and team, a supportive corporate partner in Vodafone and have built expertise, knowledge and relationships in the youth space.' Lani Evans, Vodafone NZ Foundation

LEARNINGS AND ADVICE

The Foundation shared what it is learning including what works and doesn't in the disruption space; learning from the Te Ao Māori world view; framing in a strengths based way; and the importance of relationships with community partners and knowing 'each others' kaupapa.'

Advice to others included

- Unpacking and understanding the power and privilege that exists within philanthropy
- Looking at mechanisms to share power and value the knowledge held by community practitioners
- Thinking long-term, thinking big and leaving ego 'out of it'

‘Creating change “out there” in the world is wonderful, but I believe that, as a sector, we also need to be examining ourselves and thinking about what needs to change about our own behaviours and assumptions, and about our philanthropic practice. We need to be asking ourselves how we are complicit in the problems we’re trying to unpack and how we can change that to create a more equitable future.’
Lani Evans, Vodafone Foundation

WHAT’S NEXT FOR THE FOUNDATION

Next steps include focusing on the impact model, growing sector support of the Youth Accord, projects that have the potential to ‘scale and transform the lives of many’ and ‘creating the conditions for change.’

foundation.vodafone.co.nz

nzyouthaccord.org

Theresa Holmes and Tara Moala (Tamaki Community Development Trust).



Dusseldorf Forum

CASE STUDY

Building a country where all young people thrive

STRATEGIC INSIGHT

Go up-stream and take collective action to tackle complex challenges

08

ABOUT THE FOUNDATION

Dusseldorp Forum (DF) is a family foundation set up in 1989 by entrepreneur GJ (Dick) Dusseldorp. Dick moved to Australia from Holland in the 1950's, started the Lend Lease construction company, that grew into financial services and is now global. His working and social change philosophy was that you achieve greater results through collaboration. In 2016 the Forum agreed a focus on shifting outcomes for children and families in areas of entrenched disadvantage in Australia.

'My grandfather's philosophy through his working life was there is power when you bring people together to work on complex issues. That was also his vision for the foundation. He deliberately chose the name "Forum" rather than foundation as he wanted to stress that role and that power to bring people together from different perspectives and disciplines. He believed that is how you get stronger ideas and results ... In Australia there are pockets of entrenched disadvantage where children's life chances are limited by the postcode where they are born. We believe that is not ok in a wealthy egalitarian country.' Teya Dusseldorp, Dusseldorp Forum

APPROACH AND TOOLS

DF believes that to achieve different results, long-term, place based and collective approaches are required.

Impact tools include

- Empowering local communities to lead the change
- Long-term investment, 'our most recent commitment is ten years, it will probably need to be longer. Intergenerational change requires these time frames'
- High trust relationships with local communities and partners. 'We invest time getting to know people'
- Being a connector, convenor and facilitator
- Capacity and learning opportunities for partners. For example the Annual Festival of Change celebrates partners, provides respite and peer learning. 'At the last Festival, one of the elders stepped into the circle and invited us to Arnhem Land'

- Advocacy, influencing and story telling 'that's important for external audiences and communities themselves'
- Changing the system to be more equitable for those most vulnerable

'We look for where things are genuinely community led, have a clear desire for collaboration and have that line of sight around what the systems role is in all of this and how that needs to change. That is where we think we will achieve sustainability. We don't have an application process as such. We look for organisations that match our goals, values and principles and sit down and discuss these together. We are putting the majority of our resources into this way of working. It's even more powerful when we find other foundations we can partner with.' Teya Dusseldorp, Dusseldorp Forum

ACHIEVEMENTS AND MILESTONES

Success is measured according to outcomes for kids and families; growth in community decision making capacity; impact on government systems including policy changes; and evaluation of DF by partners.

Milestones include being invited to partner with indigenous communities; the successful 'Our Place' model outside of Melbourne will be scaled to ten further communities supported by government; the community led collaboration in Bourke around justice reinvestment generated \$3 million of savings in 2017 and is 'leading the way in terms of data analysis that can inform population level strategy'; 500 change makers came together at ChangeFest 2018 in Logan and a Manifesto was developed that is influencing government policy and practice; and DF is evaluated by partners every two years. 'We partnered with two other foundations to create the Australian Philanthropic Benchmark.'

'The Department of Social Services now has policy that is almost directly implementing the principles that have been developed out of this place based work. We play a role in those outcomes. But they are very much the outcomes of our partners – they are the courageous people who get up every day.' Teya Dusseldorp, Dusseldorp Forum

LEARNINGS AND ADVICE

Learnings include that changing entrenched disadvantage requires long-term, collaborative approaches and a system view; the system is hard-wired for short-termism; philanthropy needs to go upstream and work on 'structural blockers'; evidence of change takes time and attribution is difficult; competitiveness and siloed governance 'kills collaboration'; and high trust relationships can lead to insights regarding where support is needed.

Advice to others included

- To change the system, go up-stream
- Support community models of decision making
- Invest in change makers – support respite, communities of learning and development, 'consider how you develop and sustain people in this kind of work'
- You need all different types of philanthropy, 'small-scale heart led philanthropy through to very complex active philanthropy' – work to your strengths and capacity
- Keep the door open for 'others who may wish to engage'

Dusseldorp Forum Festival of Change 2019 hosted by partner Warddeken Land Management, Warddeken Indigenous Protected Area, West Arnhem Land, Northern Territory.



'What I've seen is the importance of these change makers, investing in them as people. It's incredibly hard work, it's relentless, it's challenging, and there is value in investing in them and the relationship. We know each other really well. Our partners will reach out to us when they are facing challenges and we can mobilise resources, bring in expert advice, coaching, capacity development. The deeper relationship gives us good insight as to where support is needed.' Teya Dusseldorp, Dusseldorp Forum

WHAT'S NEXT FOR DF

The next frontier for DF is going up-stream and understanding and shifting structural blockers; giving careful thought to how you develop and sustain people in this type of work; and backing collective forms of governance.

'These developments are being led by Indigenous communities – more collective forms of governance. Aunty Mary Graham of BlackCard will say, 'this is not new for us, we have always done lateral governance. This knowledge goes back thousands of years.' This is an important part of this work. That connects with structural barriers that are hard-wired within government, how do you unlock those and redesign them. Bring in that knowledge. It's super exciting.' Teya Dusseldorp, Dusseldorp Forum

dusseldorp.org.au

The Peter McKenzie Project

CASE STUDY

Helping create an Aotearoa New Zealand where all our children, young people and mokopuna flourish

STRATEGIC INSIGHT

When thinking system change, think long-term and learn as you go

09

ABOUT PMP

The Peter McKenzie Project (PMP) has a vision of an Aotearoa New Zealand 'where all our children, young people and mokopuna flourish'. The \$17 million fund came about as a result of the thinking of the late Peter McKenzie, grandson of J R McKenzie.

A spend-down project with a life of up to 20 years, PMP is supporting a small number of big ideas designed to lead to systemic change. Funding can be for many years so these ideas can be developed, tested and brought to life.

'The Peter McKenzie Project is about striving for a country where all our children and young people can flourish. It's about reducing the number of those children and families living in poverty and seeing that happen in a way that is sustained. There is no quick fix; we are looking long-term. We see our contribution is to encourage improvements in the way systems work, rather than fund specific programmes.' Iain Hines, Peter McKenzie Project

APPROACH AND TOOLS

PMP draws on the history and learning of the J R McKenzie Trust – a philanthropic family trust that has been investing in social outcomes for more than eighty years, 'For McKenzie there has been a change in practice where larger multi-year grants are the norm, not the exception. And there is effort to not only respond to what comes through the letterbox, but to take the initiative when it doesn't.'

Impact tools include

- Investing larger amounts for longer in ideas that have the potential for system change
- Convening and bringing like-minded groups together, 'so these thoughtful people can learn from each other and we can learn too'
- Partnering with others to bring together government and community, to increase understanding and influence policy, 'We co-hosted an event with the Children's Commission and Inspiring Communities. It was attended by the Prime Minister, policy makers, community

organisation leaders and those who have lived in poverty'

- Focusing on up-stream prevention. 'Food banks are hugely important for those who use them. But do we want the best food banks in the world, or a country where food banks are not necessary?'
- Investing time in engaging and connecting with other funders

'We are looking at changes that will mean there is not such a need for social services ... Strengths-based approaches are great and what moves the needle really ... That said, at PMP we don't claim to have all the answers. We have some really able people on our team, for sure. We are looking at systemic change and we are trying to up-skill ourselves in terms of what that means.' Iain Hines, Peter McKenzie Project

The Peter McKenzie Project is named in honour of the late Peter McKenzie.



PMP ran a call for ideas and then asked fifteen of the 260, 'What would you do if you had a bit of funding to explore your idea more?' Some used that funding to test and develop their ideas, and have returned to seek ongoing support. PMP will also explore other initiatives, and is interested in funding long-term, 'for ten, fifteen or even twenty years.'

ACHIEVEMENTS AND MILESTONES

It is early days on the journey. Success will be measured long-term and utilise indicators such as those highlighted in the Child Poverty Monitor – however measuring PMP's contribution to any changes in those measures is challenging. PMP people believe that complex issues



Te Ohu Whakawhanaunga foundation training programme for community organising.

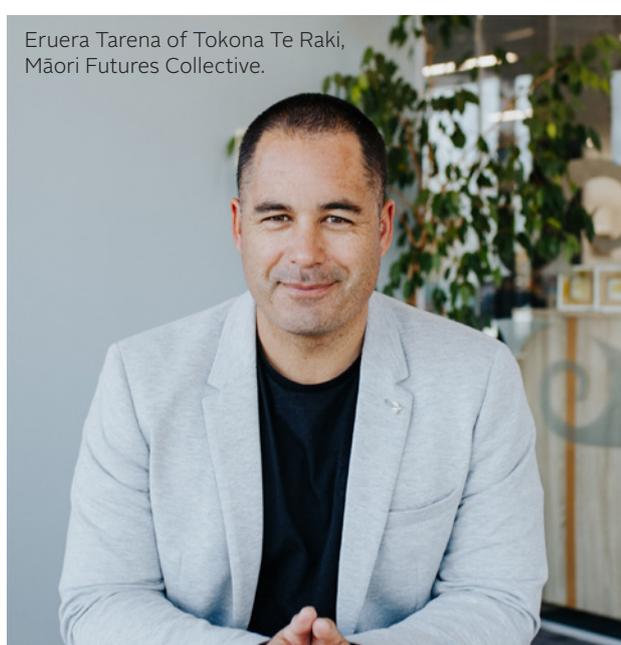
require long-term strategic investment and informed risk-taking, and consequently have committed some of the largest grants ever made by McKenzie.

Two of the first initiatives with which PMP has formed funding relationships:

Te Ohu Whakawhanaunga is an alliance to bring the community organising model to Auckland and converge grassroots communities together around the issue of child poverty. The name was gifted by the Māori Women's Welfare League and 'speaks of a collective of groups working together for the whole, while maintaining the integrity of each member'. Each organisation brings, 'their voice to this knotty problem of child poverty, helps define the programme of work and build strategies and activities to address the issues that surface'.

Tokona Te Raki or the Māori Futures Collective is a Ngāi Tahu-led collaborative established to increase Māori participation, success and progression in education and employment outcomes. Investment in this initiative builds on J R McKenzie's focus over the last decade on Māori-led development. Tokona Te Raki's goal is to achieve equity in education, employment and income for all Ngāi Tahu and Māori in the Ngāi Tahu takiwā by 2040. The approach is a combination of collective impact, design and systems thinking.

'JR and Peter McKenzie is a courageous funder that seeks to understand and work with the people they provide funding to. They are values based, rather than output oriented, have a deep commitment to social justice, family and community prosperity and community empowerment. There is a trusting relationship. It makes it feel more equal and that is not normal. Funders have a lot of power over those whom they fund. With Peter McKenzie it is more a partnership focused on social change (than about reporting). It takes courage to change those power dynamics.' Annie Newman, Te Ohu Whakawhanaunga



'J R McKenzie has quite often funded things that others do not fund. With Māori development there has been an explicit focus over the last decade or so on supporting Māori-led development ... Tokona Te Raki are being creative and thoughtful, and are willing to take risks. We are backing the process and the people leading it.' Iain Hines, Peter McKenzie Project

'We are talking about redesigning the systems for Māori success. We can use big data to help prioritise the critical points for innovation and then co-design with whānau, test and evaluate. This is an iwi-centred approach (like a collective impact model) where the iwi is the backbone. The changes are not silver bullet projects, but looking at how do we change policies, power dynamics, practices, funding flows and mindsets. With Peter McKenzie we share an agreement that a starting point is not that whānau are broken, but there are systemic causes that create those inequalities. PMP is looking to address poverty at its root causes. PMP has an understanding that as a funder there needs to be a focus around systems.' Eruera Tarena, Tokona Te Raki

LESSONS AND ADVICE

PMP has learned that complex issues require a long-term collective approach; systems change is a 'messy business'; organisations can understand the logic of system change but when it impacts on their organisation 'it can be harder'; things often go more slowly than you hope; what evaluators focus on (and when and how) requires thoughtfulness and wisdom ('be wary about looking for impact too early' and empower partners in defining how progress will be tracked); and look to other philanthropic trusts to learn from (with 'healthy skepticism').

Advice to others included

- Experience experts add a lot of value – seek input from those who have lived experience of the problem you are tackling
- Invest time in reading, asking questions, attend Philanthropy New Zealand events, 'listen to lots of people then make up your own mind'
- Be curious and treat everything as an experiment

WHAT'S NEXT

Next steps for PMP include embedding new members on their committee and 'this means a bit of a chance to take stock and possibly tweak our course.' And along with the Todd Foundation they are working to strengthen a network of agencies working to improve systems and structures, following a recent retreat.

jrmckenzie.org.nz/program/peter-mckenzie-project/

Ten20 Foundation

CASE STUDY

A systems approach to reducing child vulnerability

STRATEGIC INSIGHT

Be guided by those who have lived experience

10

ABOUT TEN20

Ten20 is a ten year sunset foundation with a goal to reduce Australia's child vulnerability. It was initiated by GordonCare, who had a 125 year history of serving Australia's most vulnerable children. They realised to shift the dial a different approach was needed.

'Our name came from the idea of working for ten years to have impact in up to 20 communities around Australia. The board wanted to focus on catalytic change and rethink the way the system tackles child vulnerability. They decided to spend more, spend down and be responsive to the complex problems that children and families face now.' Seri Renkin, ten20 Foundation

APPROACH AND TOOLS

The focus of ten20 is prevention strategies to reduce early childhood vulnerability.

Impact tools include

- Having a clear goal, 'Our goal is to work alongside partners to reduce Australia's child vulnerability as per the Australian Early Development Census from 22% to 15%'
- Engaging local communities and stakeholders to identify issues and solutions, 'people living the experience need to have greater say. We asked what are the issues, what are the challenges and what do you need to address these challenges'
- Focusing on system change and shifting mindsets, practices and behaviors
- Investing time and money in building capacity, leadership and networks of learning
- Bringing government, community and business to the table, 'creating constructive spaces that lead to different practices'
- Often being the 'initial funder' and advocating to others
- Being a learning organisation. For example investing in developmental evaluation; running an adaptive strategy, 'building the plane while flying'; and supporting



Seri Renkin.

independent evaluations of ten20 as a funder

- Investing in backbone organisations through 'invitation only' capacity and leadership grants and a rapid response fund

'We thought we had a view of what system change was and it has changed as we have gone through the process. We know that with current approaches we are not seeing the shifts and changes. The system change is about saying we have to do something different. It's a completely different power dynamic.' Seri Renkin, ten20

ACHIEVEMENTS AND MILESTONES

Ten20's achievements include having catalysed and helped position Opportunity Child* for independence; strengthened capacity of backbone organisations; grown a body of knowledge and tools around how to invest in 'community led social innovation that informs government and others'; and Australian philanthropy better understands why catalytic approaches are needed and what they look like.

**Opportunity Child is a national open source learning platform, focused on enabling community led innovation in early childhood across Australia.*

'It's more progress markers and process change as opposed to whole population change. For example we are looking at are the communities set up from a capacity point of view; how effective and well resourced is the backbone leader; are the initiatives set up to be sustainable; the governance structure (all areas including community engagement). Then there is the mindset, to what extent is the culture a collaboration, are leaders and key people putting in discretionary effort and is learning being captured. We look at trust and the way communities see us as ten20 – how we can adapt.' Seri Renkin, ten20

LEARNINGS AND ADVICE

Ten20 learnings include rethinking the system requires time and space, 'the biggest learning is underestimating what it takes on every level'; being a sunset organisation gives focus; there is power in convening and collaboration; system change requires shifts in conditions, mindsets, power dynamics and structures; focus on learning, 'we created a developmental framework around strategic questions'; and local context is important – equip local leaders and communities to solve their own problems.



Above and right: Peer to peer community leaders network sharing and learning.



- Evidence of change takes time, 'it will take more than ten years to transform the current early childhood system and we are a small sunset foundation. Look for markers along the way'
- Ensure your board have the right skills mix
- Share what you are learning

'Make sure your board have the right skills and understanding of this type of work. I've been fortunate. I have quite a few business people on my board who work in the tech innovation space, in change areas and also progressive NGO leaders. They are prepared to take risks. Governance of a sunset foundation needs to be able to adapt, run a learning strategy, and understand that risk and innovation can be a good thing. For us the whole culture was set up right from the beginning.' Seri Renkin, ten20

'This more strategic approach has enabled us to develop deep and trusting relationships with the initiatives and the leaders in the eco system we are working in. That has meant that rather than sit outside the social issue, we are at the table. We can respond and be useful, we can bring in expertise if needed, tap into funding. It also means we are in constant dialogue and strategic conversations at a systemic level. We are grappling with how we share our knowledge and learning, so others can benefit from it.' Seri Renkin, ten20

Advice to others included

- Have conversations around 'what does inequity mean in the funder and community relationship?'
- Don't try and drag along those 'entrenched in the old' – focus on the pioneers and those in the middle who understand 'things can't continue this way'
- Back great leaders and trust them
- Co-design with community and stakeholders
- Find your tribe – Find people who have done systems work 'where ever they are in the world' and 'build on others scar tissue and positive experiences'

WHAT'S NEXT

As ten20 approaches it's sunset, priorities include consolidation; building a collective knowledge pool and informing/influencing others; increase awareness within philanthropy of the importance of empowering local communities; and support key partners to be sustainable beyond sunset, 'the passing of the baton'.

www.ten20.com.au

Tokona Te Raki

CASE STUDY

An iwi led approach to future making

STRATEGIC INSIGHT

Raise the gaze and move at the speed of trust

11

ABOUT TTR

Tokona Te Raki: Māori Futures Collective (TTR) is a Ngāi Tahu led, whānau-centred approach to creating a better future. It is 100% iwi owned. The vision of TTR is that all Ngāi Tahu and Māori achieve equity in education, employment and income by 2040. The ethos connects with the whakatauki, 'Mō tātou, ā, mō kā uri ā muri ake nei – for us and our children after us.'

'We believe that change is possible; through research, innovation and relationships we can lead a movement that will fundamentally transform the current system – remove systemic bias and inequality - and create opportunities for all rangatahi and their whānau to determine their own future. This means equipping our rangatahi with the information and tools to create their own solutions whilst also working with partners to transform the way the system engages rangatahi and whānau.' Eruera Tarena, Tokona Te Raki

'TTR is about Māori achievement and equity in education and employment. Change is possible but for it to be effective we need to be influencing and engaging at a systems and structural level. Being iwi led we have a real opportunity to be that conduit and convene that space for partners who are prepared to think differently, do things differently and work together to achieve shared goals.' Porsha London, Tokona Te Raki

APPROACH AND TOOLS

TTR has a focus on learning, long-term outcomes and systems (over programmes). TTR draws on numerous models, from human centred design to collective impact. Porsha of TTR shares, 'A key part for us as an organisation is to articulate a systems change perspective through a Te Ao Māori lens.'

Impact tools include

- Being whānau-centred
- Designing for innovation and Sustainability, 'It's about the future generation'

- Working with both quantitative and qualitative data including the lived experience of whānau and rangatahi
- Utilising developmental evaluation as a tool to learn our way through
- Building a future making approach that includes long-term partnering collaboration and industry and tertiary convening
- Utilising a range of pre existing systems mapping tools including persona's, journey maps, design thinking as well as developing Ngāi Tahu centric approaches, models and frameworks
- Convening and bringing together multiple players and stakeholders including schools, business, education and whānau to break down silos and connect the dots

'As an organisation we have looked to a range of different approaches including human centred design, systems thinking, developmental evaluation, Te Ao Māori – as part of identifying potential ways to address a solution focused approach to our vision of equity for Māori by 2040 As an organisation we knew we needed to do things differently.' Porsha London, Tokona Te Raki



'We talk about our education systems as being like a braided awa – an interconnected ecosystem with multiple pathways which can have powerful unseen currents that propel, block, divert or trap rangatahi. We can throw life jackets at people in the rapids, or we can intervene upstream and redirect the flow towards prosperity and wellbeing (rather than constraining opportunities). Rather than catching people when they are in trouble, how do you keep them in flow? That sometimes require digging a channel, smashing the odd damn, removing some of the rocks and hazards. We are focusing on the eco system itself, rather than just symptoms. Raising our gaze from the circumstances of the individual to see the patterns of the system and how they channel rangatahi towards predetermined outcomes. Unfortunately choice is an illusion for too many of our rangatahi.' Eruera Tarena, Tokona Te Raki

ACHIEVEMENTS AND MILESTONES

For TTR it is 'super early days.' Milestones on the journey to date include disestablishing the old entity (a twenty year old tertiary education partnership); establishing the new one and holding the 'first Ngāi Tahu social innovation wananga.' Also forming a five-year partnership with the Peter McKenzie Project, 'it allows you to think ahead ... they are leading the way for other funders.'

Various 'live projects' have also been sustained and are being utilised as test beds, 'we are applying our social innovation tools and lab based approaches within our community projects.'

An example of initial outcomes include supporting 210 trade trainees into qualifications and career trajectories; developing insights and prototyping with rangatahi in the future making space (including advancing student voice as part of Kaiako PLD in a number of different contexts in Aotearoa); building advocacy and partnership through a Treaty based governing group; building capability within Te Rūnanga o Ngāi Tahu through social innovation wānanga, and much more. Secondments have been a useful tool for spreading knowledge, tools and skills and in broadening the partnership network.

'Success will be measured in three tiers – individual success, population level to whānau, and are we making a difference across New Zealand in terms of a collective impact systems approach.' Eruera Tarena, Tokona Te Raki

'We capture learning as we go through developmental evaluation. And we do weekly reflection sessions, internal data parties and feedback insights with the team. From there we make organisational learning and prototyping goals, it's an iterative cycle.' Porsha London, Tokona Te Raki

LEARNINGS AND ADVICE

TTR's first lesson was they needed to change themselves. 'We had to rethink as a team, our kawa, our approach.' and it 'takes time'; holding firm to your values (such as long-term partnering); 'tools not rules'; social intrapreneurship can be lonely and it's helpful to learn from others on a similar journey.

TTR is learning what a Treaty based approach to system change is – that remains a work in progress, 'what does it look like for us, what makes it unique within our cultural context?'

Rather than give advice, Eruera from Tokona Te Raki would prefer to sit down and have a 'good chat'.

Tips from the team include

- Be in it for the long haul
- Start by starting, and learn by doing
- Embrace a learner-v focused future mindset

'The whanaungatanga is important, learn as you go, learn from others who have been there and hopefully we can contribute stuff as well. There is an old saying – if you want to go far, move at the speed of trust.' Eruera Tarena, Tokona Te Raki

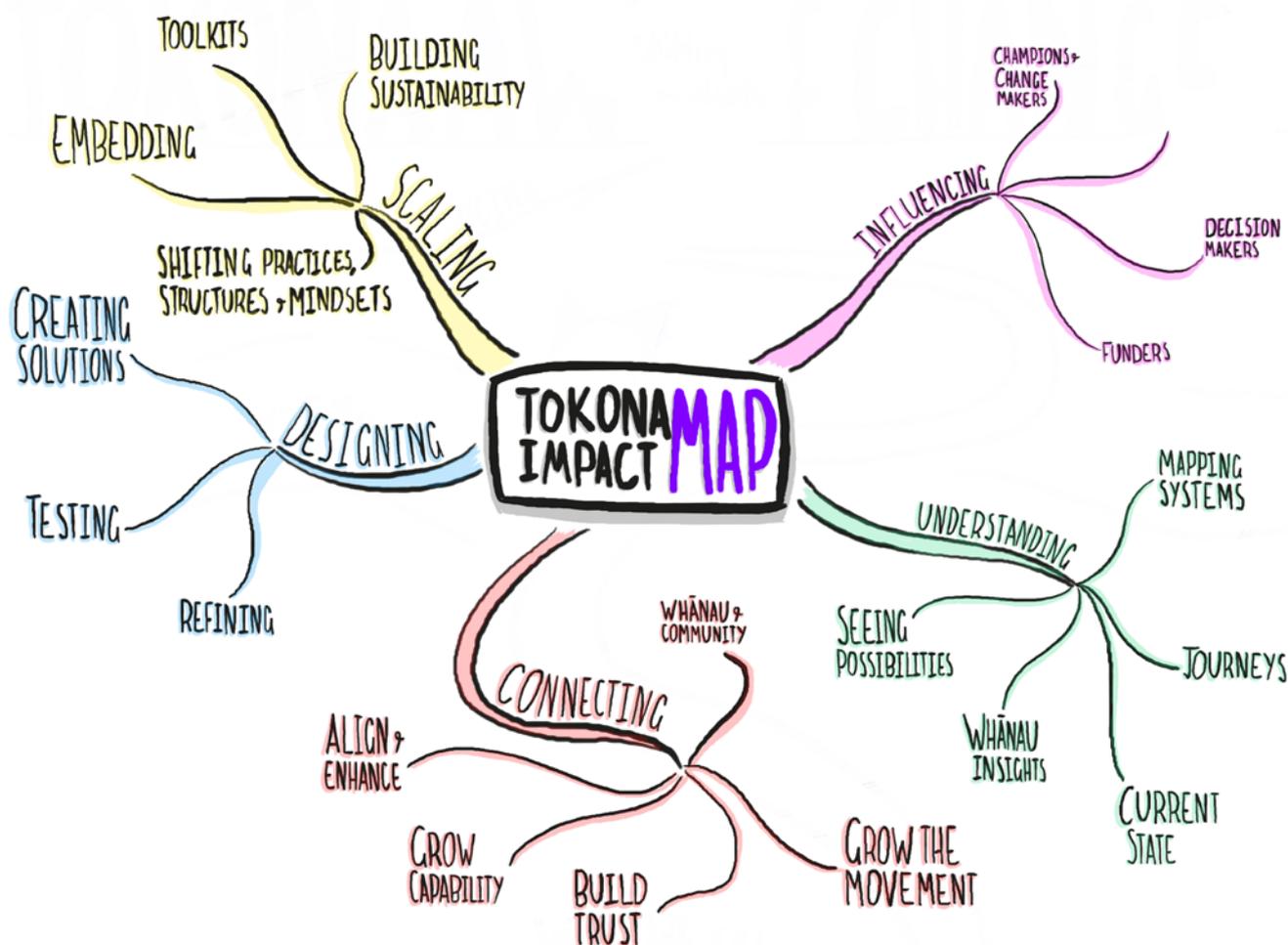
WHAT'S NEXT

Next for TTR is deepening thinking around social innovation within a Treaty context; tapping into cultural context as a source of power and inspiration; growing capability; sharing insights; and storytelling. Eruera sees potential for a New Zealand network. 'It's important to network all of those who are trying this stuff, it can be a lonely journey.'

Learning to tell the story well will be key to building the 'influence, the mana and the collective.' of TTR.

'Systems are like the taniwha in the mountains, everyone refers to it, but no one really knows what they look like. Being able to describe these systems, what they look like and how they act is key to working together with others to achieve systems level change.' Eruera Tarena, Tokona Te Raki

www.maorifutures.co.nz



The Southern Initiative

CASE STUDY

Social innovation in South Auckland

STRATEGIC INSIGHT

System change can be achieved through working simultaneously at grassroots and government level

12

ABOUT TSI

TSI supports a prosperous, resilient South Auckland where tamariki and whānau thrive. It is a place-based regeneration programme and was formed in the Auckland Plan 2012. Nearly 20 per cent of Auckland's population live in the area covered by TSI, which is highly youthful, mainly Pacifica and Māori, and abundant in talent and strengths. There is a combination of challenges and opportunities that require focused work.

'Shared prosperity is a focus of the work and recognition that South Aucklanders haven't had a fair share of Auckland's growth, it has the lowest quality jobs, the lowest incomes. And with a large youth population South Auckland is a place where the future workforce is growing up. With new technology and the future of work, there is an opportunity for South Auckland to be ahead of the wave. The other areas is early whānau and tamariki wellbeing and a focus on the first thousand days. We know that is a critical time for child development and setting people up for life.'
Gael Surgenor, TSI

APPROACH AND TOOLS

TSI champion's social innovation. 'This calls for experimenting, learning and delivering what it takes to assist real socio-economic transformation.'

Impact tools include

- Utilising an integrated social and economic development approach, 'that is probably the unique thing about TSI'
- Social procurement (starting within Council) and focused on growing Māori and Pacific businesses, 'they are more likely to pay a living wage and provide appropriate pastoral care and support'
- Putting transformation and quality jobs at the centre of the work we do. Influencing employers to 'pay a living wage' and support career progression and upskilling
- Leveraging initial Council investment to attract Government and philanthropic contributions

Gael Surgenor TSI.



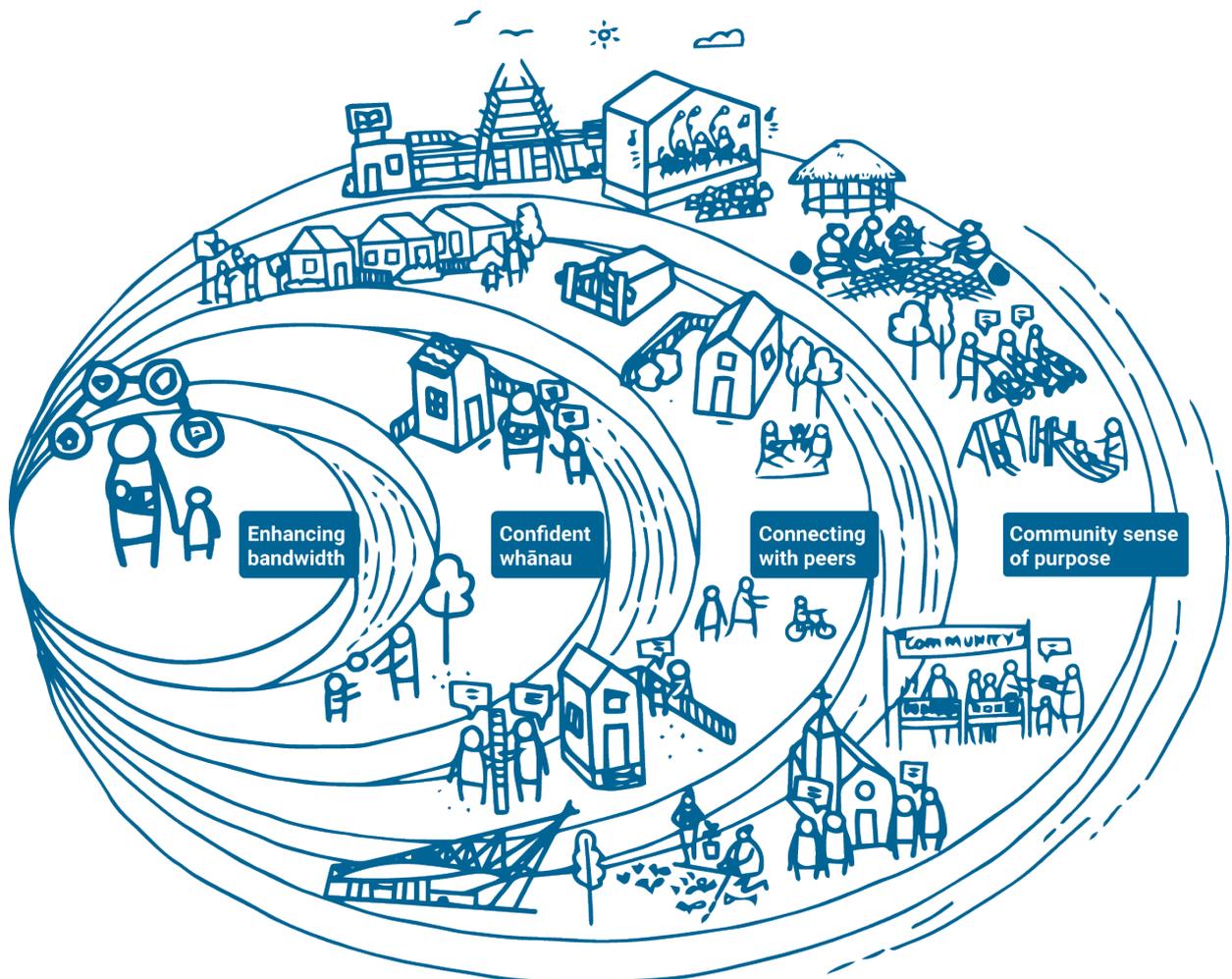
- Using the tools of co-design, human-centred design, rapid experimentation and prototyping
- Harnessing the 'voices of the people most affected by the issues we are grappling with' and putting whānau at the centre of design
- Drawing on indigenous knowledge systems. 'We have developed our approach to experimentation which uses Mātauranga Māori and woven that into our evaluation framework.'
- A theory of change 'for all of our work' and an 'overarching theory of change for TSI'
- Working on two levels simultaneously to achieve system change

'System change for us means working on two levels of scale simultaneously – on the ground with people affected (understanding what it takes to enable change) and at a systems level – looking at what is holding those problems in place, keeping things stuck, or not enabling better outcomes. Some of that means engaging with the government and looking at our own systems that Council is a key actor in. The procurement system is one. The early years is another. We are working at both grassroots community level and with government.' Gael Surgenor, TSI

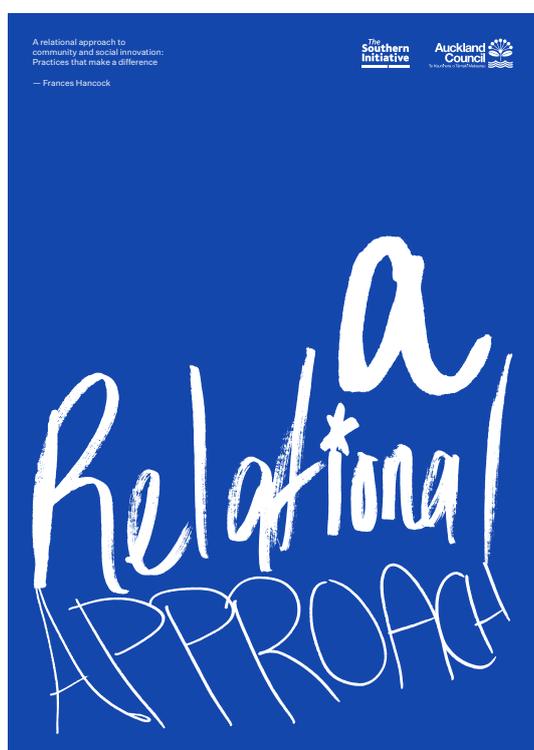
ACHIEVEMENTS AND MILESTONES

Nearly five years in, TSI is transitioning from start-up into 'main phase' and the fruits of the work is starting to show. TSI has pioneered the social procurement work 'that is happening nationally.' This mahi has grown locally owned businesses in the Auckland Council procurement network and via He Waka Eke Noa increased the number of Māori and Pacific enterprises in government and corporate supply chains. There are now over 100 businesses registered with He Waka Eke Noa.

Further milestones include introducing whānau led development with 'whānau led solutions and leadership'; leading a healthy homes co-design process (increasing collaboration between government, Council and community); documenting the benefits of TSI through independent research, 'A Relational Approach' (which includes the voices of 25 local leaders); leveraging initial Council resources to attract Government and philanthropic investment; and building a reputation off 'hard graft and achievements.



TSI has observed that through a whānau-centric co-design practice there are noticeable impacts at many levels of whānau's lives.



Independent research demonstrates benefits of TSI.

'We had a visit from the Royal Society of Arts in the UK, to be part of a global connecting cities project. We are a good example of inclusive growth and place-based practice. We are beavering away in South Auckland, but when our work is looked at by people internationally, we are stacking up.' Gael Surgenor, TSI

LEARNINGS AND ADVICE

TSI has learned that significant change takes time, is hard graft and 'there are no silver bullets'. Also that inequality that has taken 30+ years to create will not be turned around in three or four years. Further learnings include as you mature you need a more diverse team (and people who are more planning oriented can clash with those comfortable in start up, 'that is a good leadership challenge'); evaluation must be meaningful and appropriate

for the complexity being grappled with and attribution is hard (there are many contributors); collective effort and collaboration is key to achieving significant change; you earn your way to 'be able to convene some of those collective conversations'; and this is important for 'system level impact' and sustained change.

Advice to others included

- Take time to reflect and value learning as much as doing
- Build a team that 'fits the challenge' – in the case of TSI that is place-based work
- Pay attention to caring for the people – this work is a vocation not a job
- Listen to voices on the ground
- Invest more in the social R&D and be cognisant that (as in business) not every investment will have a return
- Support convening of leaders in the practice of more thoughtful, strategic, social change work

'Approaching social change more thoughtfully, there is more chance of success. Where we are working, change is not happening fast enough or with enough impact for what is urgently needed. We need the system level change. We have to get better at working skillfully in complexity. That is an art. It's not just a science. Keep honing your craft.' Gael Surgenor, TSI

WHAT'S NEXT

Now a platform has been built, TSI will be converging effort into more significant impact and ensuring some of the initiatives can stand on their own.

'There needs to be more convening of leaders and people in the practice of more thoughtful, strategic, social change work. Often we are working in isolation, the connections in the eco system need to be stronger.' Gael Surgenor, TSI

G.I.F.T

CASE STUDY

Foundation North's innovative approach to improve the mauri (life force, vital essence, health, wellbeing) of the Hauraki Gulf

STRATEGIC INSIGHT

Sometimes you need to break your own rules

ABOUT G.I.F.T

The Gulf Innovation Fund Together (G.I.F.T) was initiated by Foundation North to ignite innovation and improve the mauri of the Hauraki Gulf. Research had shown that only 3% of philanthropic funds in Aotearoa was going to environmental initiatives and every health indicator for the Gulf was in decline. Foundation North has committed \$7 million with the aim of significantly improving the environmental health of the Gulf.

G.I.F.T builds on the previous learning of Foundation North's Māori Pacific Education Initiative (MPEI) and Catalyst for Change. 'In our earlier grant making there had been grants that were too big, for too long and with heavy reporting constraints – we wanted to spark new ideas and innovation'. The fund is looking to test innovation, apply learning and raise awareness of the issue.

'With GIFT we are breaking all of our rules in order to achieve what we want to achieve. We had a long history of funding work on the islands, but not much on the Gulf itself ... we decided to set aside a sum of \$5 million (adding an additional \$2 million in March 2019) to actively work with others in partnership from day one and be much more flexible in who we would fund. We are looking at it with a whole of landscape lens – the degradation is being caused by multiple factors.' Peter Tynan, CEO Foundation North

APPROACH AND TOOLS

Central to approach is innovation, and framing the change in terms of mauri which includes people's emotional, spiritual, cultural and felt connections with land, sea, birds, fish and people. This was a significant cultural shift for Foundation North and has enabled a deeper connection to the Gulf. G.I.F.T is a living case study for Foundation North on 'how to innovate.'

Grants are 'open all hours' and are Hauraki Gulf specific, innovative and holistic. The investment approach provides a pathway from seed, to scale and system. A group of four trustees (rather than 15) hold the governance of G.I.F.T giving agility to decision making.

Impact tools include

- Engaging meaningfully with government, philanthropy, iwi and others
- Connecting and convening. 'We have been bringing all of the grantees together, to share their stories and learning. There seems to be a lot of value in that'
- Being more flexible in who could be funded. For example including social entrepreneurs and individual researchers, 'We have a much more eclectic group'
- Taking a broader systems approach as degradation is not caused by one event, 'You have to talk to landowners, industry, farmers, service sector, individuals'

The Hauraki Gulf (acknowledgement to Foundation North and photographer Dave Olsen).



- Bespoke capacity-building support for partners such as legal advice and financial modeling
- Communicating and advocating to increase awareness of the issue
- Evaluating all grants. 'We can apply the learning'

'Having improving the mauri of the Hauraki Gulf as part of the vision statement has been incredible for the project. It has been a way of connecting to the Gulf more deeply ... We now talk about projects that have mauri – they have a heartfelt connection ... When we got onto the water, it made such a difference. It was really important that our trustees got on the water.' Chloe Harwood, Foundation North

ACHIEVEMENTS AND MILESTONES

G.I.F.T achievements and milestones include bringing together people who normally work in silos; increasing investment in the Gulf through leveraged funds of over \$3 million; building a change community; activating innovation and ideas (35+ projects and counting); increasing awareness of the environmental degradation of the Gulf;

prototyping a way philanthropy can support innovation; and evaluating and learning.

'Through GIFT we have tested all our own rules and ways of behaving ... we would never get even the applicants that we wanted let alone the projects. They wouldn't even be able to come in the door. We have a whole new group of partners we are working with who were not on our radar before and we weren't on theirs. Without violating the fundamentals of what gives you charitable status - we have discovered philanthropy has way more leeway than we give ourselves.' Jennifer Gill, CEO of Foundation North at G.I.F.T's inception

LEARNINGS AND ADVICE

G.I.F.T has been an illuminating voyage, and learnings include that indigenous models and frameworks can hold solutions for the future; innovation starts with 'innovating ourselves' and giving 'space' is important (including to staff); it's easier to take risks with smaller amounts of funding ('with Catalyst for Change we learned it was too hard to grant \$4 million'); and there is value bringing partners together where there is common shared purpose.



G.I.F.T aims to improve the mauri of the Hauraki Gulf (acknowledgment to Foundation North and photographer Dave Olsen).

Advice to others included

- Have a strong, long-term vision
- Break your own rules or establish as few rules as possible
- You have to invest in people, 'don't be scared to spend money on people' and 'resource up a project well'
- Invest in research
- Be flexible and responsive to where the community is at
- Don't be afraid to try stuff and not all of it will work, 'philanthropy can be risk capital'

'If you want different outcomes you have to do things differently yourself. We have broken our own rules ... I like the model that we have with the seed, scale and system change. It gives us flexibility to respond for where the community or issue is at. If you just have a seed fund, where do they go to? If you have the ability to take things through the system that is really helpful.' Kim Collins, Foundation North

WHAT'S NEXT

Next steps include deepening relationships with iwi; explore further partnerships and leveraged funding as 'no one funder can do this alone'; increase awareness through communications and grow the community; explore the role of advocacy and influencing government 'with integrity'; work with the trustees on future strategy; and continue to learn.

www.giftofthegulf.org.nz



Predator Free New Zealand

CASE STUDY

NEXT Foundation's role in building a predator-free country

STRATEGIC INSIGHT

A collective impact approach can multiply outcomes,
build ownership and sustainability

ABOUT NEXT

NEXT was founded by Annette and Neal Plowman in 2014. It is a sunset Foundation with a ten year commitment life and \$100 million endowment. NEXT's vision is to create a legacy of environmental and educational excellence for the benefit of future generations of New Zealanders. Environment and education are both areas the Plowmans care deeply about.

The health of NZ's land and water is integral to national success and identity – Māori understand this as kaitiaki or guardians of the land. New Zealand biodiversity is in a state of decline. Introduced predators are the primary cause of damage to endemic plant and animal life, including the killing of an estimated 25 million native birds each year (70,000 every night).

NEXT understands that for New Zealand's unique biodiversity to thrive we must first get control of, and where possible eliminate, the negative influences. Removing pests and keeping them out will support long-term environmental resilience and transformation. To be successful we must develop technical and scientific capability and build social cohesion and community resilience as neighborhoods rally and collaborate around a common and actionable goal.



Taranaki Mounga who release - where NEXT applies collective impact principles.

'In 2016 the Government set a national target of New Zealand being predator free by 2050. This has added momentum to the huge community groundswell of concern for our natural environment. NEXT is proud to be involved in that movement on many fronts.' Devon McLean, NEXT Foundation

'The natural world is intrinsic to who we are as New Zealanders. And there is a unique set of values that comes through in tikanga Māori. These value sets are alive in New Zealand. The idea of being part of the land rather than having dominion over it.' Jan Hania, NEXT Foundation

APPROACH AND TOOLS

NEXT invests in a small number of multi-year initiatives giving financial and non-financial support. High performance organisations are targeted that are transformational, inspirational and business-like. Collaboration, partnering and building collective ownership positions the mahi to be sustainable long-term.

Impact tools include

- Scanning activity to build a system view and identifying gaps and opportunities. For example, a national scan revealed a high volume of isolated activity in predator free; lack of a unifying vision; lack of landscape scale mindset; a shortage of investable organisations; need for research and development (R&D); and opportunity for a social campaign or movement
- Applying collective impact principles including shared goals and collective ownership. For example, Taranaki Mounga is a collaboration between eight Taranaki Iwi, DOC and NEXT as founding partners, together with TSB Community Trust, Shell New Zealand, Landcare Research and Jasmine Social Investments as founding sponsors. The consortia work closely with local groups and volunteers towards a collective goal
- Partnering and convening for sustainable impact, including with government. The Tomorrow Accord agreement with government is an exemplar of what is possible through partnership

- Advocating with Government, regional authorities, corporates, not-for-profits and others to increase impact. For example creating Zero Invasive Predators by facilitating a private-public-philanthropic alliance between philanthropists (Sam Morgan and Gareth Morgan), founders DOC and NEXT and several business interests
- Influencing others to think more strategically and long-term. For example encouraging and working alongside DOC to think at landscape scale and over decades
- Investing multi-year with an objective of sustainability beyond NEXT
- If the right organisation to invest in doesn't exist, NEXT may work with others to build it
- Being business-like, evidence based and learning focused
- Frequently supporting grant partners with a NEXT representative (the 'waka kaihautū' or NEXT navigator) engaged at governance level

'Acting as an honest broker to convene parties who sometimes find it challenging to work together is a critical role for NEXT. Together we can achieve things that no one party can do alone, especially if we don't mind who gets the credit.' Devon McLean, NEXT Foundation

'NEXT brought the idea, the concept and assisted in getting the parties around the table to get buy-in and support. That was with DOC and iwi. You've got the role NEXT play as being a founding partner, having a director on the board and bringing some leadership in terms of capability and also experience and insights from Project Janszoon.' Jamie Tuuta, Taranaki Mounga Chair

ACHIEVEMENTS AND MILESTONES

NEXT's predator free activities build on the previous decade's philanthropic work by Neal and Annette Plowman. Achievements include making Rotorua Island predator free; the Tomorrow Accord agreement with Government; 'Once transformational change is delivered the Crown secures the long-term'; ecological wins in Abel Tasman National Park; building the consortia that is backing ZIP and more recently Taranaki Mounga; development of techniques and technology for monitoring and managing zero or low predator numbers (ZIP); demonstrating that projects at landscape scale can be executed; investing selectively in the social movement for a predator free New Zealand; and encouraging Government to establish Predator Free 2050.



Te Manahuna Aoraki is NEXT's most recent collaborative environmental investment.



ZIP is developing tools and techniques to make areas of the mainland predator free.

'This is a movement that NEXT has been at the centre of creating. NEXT is working out how to connect the whole landscape and make the whole system work. There is a huge resource coming in from the regional councils and primary industries. The whole system plays together.' Lou Sanson, Department of Conservation

LEARNINGS AND ADVICE

Learnings on the predator-free journey include the importance of engaging iwi early; partnerships take time, require investment in the relationship and humility; NEXT is more powerful as a catalytic investor (as new projects are developed NEXT has shifted from being a sole funder to partner, convener and collaborator); collective impact approaches can build collective ownership and long-term sustainability; investing in advocacy and government relationships is important; and backing good people is critical to success.

'With Project Janszoon one of the things I didn't do well was involve local iwi sufficiently at the beginning ... we should have persevered. We are making up that ground

now. When we started talking about Taranaki Mounga I was keen for us to get iwi involved from day one. That was a key learning in terms of the social process.' Devon McLean, NEXT Foundation

Advice to others included

- Consider a collective impact approach – this can multiply outcomes and build sustainability
- Know your strengths and play to them
- Move beyond the traditional funder role, don't be afraid to get your hands dirty
- Establish and operate by your values, 'Most of our projects rely on values derived from Te Ao Māori'
- Focus and choose your battles

'If a little guy like us is going to be able to make a difference on a national scale then the timing has to be good. That's partly about choosing your battles.' Bill Kermode, NEXT Foundation

WHAT'S NEXT

Next steps include applying the learning and scale impact in Te Manahuna Aoraki (an ambitious project that will preserve one of NZ's most stunning landscapes and its threatened species); and considering further opportunities to leverage and scale impact to secure NZ's biodiversity.

www.nextfoundation.org.nz

He waka eke noa

We're all in this canoe together

Acknowledgements

Ngā mihi nui ki a koe

Thank you to everyone who contributed to 'Lifting our Aspirations.' Your time, generosity, mahi (work) and humble learning spirit is appreciated. Acknowledgements also to everyone out there working for social and environmental transformation in Aotearoa New Zealand and beyond.

For additional hard copies of *Lifting our Aspirations* please email enquiries@NEXTfoundation.org.nz



Factors for success

We asked the leaders we interviewed, what are the success factors for strategic or thoughtful philanthropy? Here is what they shared.

'Have a long-term vision, invest in **people** and look to build and maintain relationships with Mana Whenua.'

Chloe Harwood, Foundation North

'High-impact philanthropy requires **innovative actions**, including convening and advocacy, going beyond traditional grant making.'

Emily Tow, The Tow Foundation

'As a philanthropic sector we need to examine ourselves and think about what needs to **change** about our practice.'

Lani Evans, Vodafone NZ Foundation

'**Listen** to the experts of context, listen to those closest to the issue.'

Seumas Fantham, Todd Foundation

'Intervene upstream, explore a **Treaty based approach** to system change and be in it for the long-haul.'

Eruera Tarena, Tokona Te Raki

'**Talk** to others who have done it and learn as you go.'

Terri Eggleton, BayTrust

'Intentionally develop long-term relationships for long-term outcomes, nurture reciprocal **partnerships** and engage in exchanges that enhance the mana of giver and receiver. I am interested in what a uniquely Aotearoa model of generosity could look like.'

John McCarthy, The Tindall Foundation

'Think **long-term**, be curious and ensure governance represents the communities you serve.'

Iain Hines, Peter McKenzie Project

'Put those people most impacted by the issues at the centre of design, draw on **indigenous knowledge** and value learning as much as doing.'

Gael Surgenor, The Southern Initiative

'Build authentic, enduring relationships and bring **humility** with you.'

Christina Howard, Todd Foundation

'Focus efforts, prioritise **local knowledge**, partner up and go at the speed of those doing the work.'

Jenn Chowaniec, Wayne Francis Charitable Trust

'To achieve system level change involves government - fund **advocacy** and use your voice and leadership, to influence changes in policy and legislation.'

Fred Blackwell, San Francisco Foundation

'Partner well and build **collective ownership** and value-add investment (beyond the financial) around a shared goal.'

Jan Hania, NEXT Foundation

'Intergenerational change requires long time frames, trusting **relationships** and collective efforts.'

Teya Dusseldorp, Dusseldorp Forum

'Have a clear goal, listen to those with lived experience and **focus on systemic change** - shifting mindsets, practices and behaviours.'

Seri Renkin, tenzo Foundation

'In an Aotearoa NZ context, consider how the language of systems change can be accessible and **inclusive** for community, whānau, hapū and iwi.'

Porsha London, Tokona Te Raki

Special thanks to the children at the Kids Domain Early Learning Centre.
Photo credit: Daniel Lee.

