

## Being the Vision, Funding the Vision

Tena koutou katoa. Tenei te mihi nui ki a koutou katoa o Aotearoa whanui, i runga i nga ahuatanga katoa e haere ake nei. Funding a vision helps us to realise our dreams? What a statement! Is it true? Who and what are we talking about? Is it about you, business, iwi, not-for-profits? What does funding a vision mean? Is it relevant?

### **Ma te huruhuru te manu ka rere – it is feathers that enable the bird to fly Providing accessible funding information that helps New Zealanders realise their dreams**

The vision, that Funding Information Service was created to fulfil 20 years ago in 1990, is very much the same and is just as relevant today as it was then. In its first annual report in 1994, Funding Information Service stated, "It was established to make information about funding for individuals, community groups and organisations as accessible as possible."

Accessible funding information remains the key measurement which this organisation must address to determine whether its vision is being fulfilled and generally we find ourselves coming up short.

However this is not a statement about shortcomings, but rather a call for action to continually assess how to reduce the shortcomings or barriers which stifle and limit the vision and it is also a reminder that we have permission to consider other paradigms which may help fulfil the vision better.

As an example, over 20 years Funding Information Service has built a treasure house of funding information that is available to individuals, community groups and organisations. In testing the effectiveness of the vision we then ask the questions;

- How accessible is the treasure house to individuals, community groups and organisations?

- How accessible is the information within the treasure house to individuals, community groups and organisations?

Looking forward the challenge for Funding Information Service is to envision how it can do better to improve the accessibility of funding information to and within the treasure house for the community and how do we fund this.

"Companies that enjoy enduring success have core values and a core purpose that remain fixed while their business strategies and practices endlessly adapt to a changing world."

(September-October 1996 Harvard Business Review; James Collins & Jerry Porras - Building your Company's Vision)

### **Farewell to Jennifer Whooley**

We farewell Jennifer Whooley, Sales Liaison Advisor from the staff at Funding Information Service. We thank her for her work for the Funding Information Service with customers and communities throughout Aotearoa and we wish Jennifer all the best for the future.

### **Meaningful and authentic engagement with ethnic communities**

A Good Engagement seminar organised by the Office of the Community and Voluntary Sector on the 23rd July 2010 – Wellington, looked at meaningful and authentic engagement with ethnic communities.

The Office of Ethnic Affairs' experience from their engagement with ethnic communities was presented and it was highlighted that ethnicity is not fixed. That is, people in New Zealand may change the ways they identify themselves over time or they may identify themselves differently in different environments.

As New Zealand's population becomes increasingly diverse, government agencies and community organisations need to strengthen their connections with a range of ethnic communities.

Whilst received by the audience, some felt that meaningful and authentic engagement experienced and presented by ethnic communities themselves would also have been welcome.

### **A final word from TS Elliot**

We shall not cease from exploration  
And the end of all our exploring  
Will be to arrive where we started  
And know the place for the first time

Kia tau nga manaakitanga ki a koutou katoa.  
Kevin Haunui, General Manager

Check out [www.allaboutfunding.org.nz](http://www.allaboutfunding.org.nz)

Our funder liaison team are always adding new records to list on all our databases.

Recent additions are:

## FUNDVIEW

There are currently 836 published records on FundView, of which 641 are active, inclusive of this total, 10 new records have been added in the last 3 months. New Records include NZ 2011 Festival Lottery Fund, The Lou and Irish Fisher Charitable Trust, Boulcott Fund – Wellington Central Baptist, Rotorua District Council Community Safety Projects Fund and Springhill Charitable Trust and Frimley Foundation.

### Highlight: NZ 2011 Festival Lottery Fund.

The NZ 2011 Festival Lottery Fund Committee supports community events and activities associated with the Rugby World Cup 2011 that celebrate New Zealand's culture, heritage and diversity. It is expected that the planned event and/or activity will be held during the seven week period of the Rugby World Cup 2011 - 9 September to 23 October 2011.

## BREAKOUT

There are 66 new records in Breakout, bringing the total to 3227 of which 1970 are active. The new records are from the IET NZ Postgraduate Scholarship, P.A.C.I.F.I.C.A. Inc South Island Restart Tertiary and Secondary School Grant, Computer Science Bursaries for Maori and Pacific Students, Marian D'Eve Memorial Scholarship, Weston Scholarship and Sir Howard Morrison Vocal Scholarship.

### Spotlight: P.A.C.I.F.I.C.A. Pacific Allied (womens) Council.

P.A.C.I.F.I.C.A. Pacific Allied (womens) Council Inspires Faith in Ideals Concerning All - is a national pan pacific community organisation that was founded in 1976 with a network of branches throughout the northern, central and southern regions of Aotearoa, New Zealand. They offering two scholarships called Restart Tertiary –

A study grant for women, who, through a change in circumstances (eg, career, family, redundancy), is entering into tertiary study and Secondary School Grant - A study grant for secondary school students from the South Island needing support to continue with their education.

## Social Lending

An interesting and thorough report by Laura Benedict, Axford Public Policy Fellowship, discusses the opportunity social lending offers New Zealand's public and private grantmakers as well as social enterprises, non-profits, iwi, and low-income communities. It describes the three types of social lending: lending to social mission organisations, small businesses owned by or employing disadvantaged people, and low-income individuals to help them avoid loan sharks and improve their financial stability. A full copy of the report can be found at [www.fulbright.org.nz/](http://www.fulbright.org.nz/).

## VolunteerNet

### Volunteer and event sectors gets boost with new website

A new website that aims to boost the capability and capacity of the events sector and make it easier for New Zealanders to get involved with volunteering has just gone live.

VolunteerNet connects volunteers with event-based volunteering opportunities. It works a bit like an internet dating website where individuals can register as volunteers and search for event opportunities that match their skills and experience; and event organisers can register and search for volunteers who have the skills and experience they require.

### VolunteerNet's objectives are to:

- enhance the volunteer recruitment and management process organisers
- increase the network of skilled volunteers available to the events sector
- make event-related volunteering opportunities more accessible
- connect volunteers with opportunities that match their skills and experience
- help promote volunteering in New Zealand in general.

VolunteerNet aims to boost the capability of the events sector through the provision of a free online volunteer recruitment and management tool and easy access to a growing pool of volunteers with a wide range of skills and experience. It also makes it easier for people to get involved in volunteering, through being able to search and sign up to opportunities online.

VolunteerNet will work alongside stakeholders across the voluntary sector to help promote volunteering in general throughout New Zealand.

While capturing the enthusiasm generated by the 2011 Rugby World Cup Volunteer Programme was the catalyst for VolunteerNet, this is not just about sport. VolunteerNet caters for events of all shapes and sizes including local community events, art and cultural festivals, fundraising drives and special interest events such as environmental, educational and faith oriented events.

VolunteerNet has been developed by New Zealand Major Events, a unit within the Ministry of Economic Development. <http://www.volunteernet.org.nz/>

## Quick Response Grant - ASB Community Trust

ASB Community Trust now has quick response grants available in three of its funding areas: Learning, Recreation & Sport and Arts & Culture.

The usual closing sector dates apply, but with quick response grants applicants get a decision within eight weeks of the closing date.

The Trust's website spells out the maximum amount that will be granted and exactly what the grants can be used for. You can read more on the Trust's website: <http://www.asbcommunitytrust.org.nz/funding/what-we-fund>

ASB Community Trust decides on grants for groups and projects in Auckland and Northland each month. Any incorporated or charitable trust in Auckland and Northland can apply for funds, provided they are a not-for-profit organisation.

Using funds from the sale of its shareholding in the Auckland Savings Bank, the Trust has granted almost \$700m since being formed in 1988. This year the Trust has a grants budget of \$45 million, spread over 10 funding sectors.

# FINZ 2010 New Zealand Post Annual/Regular Giving Programme Fundraising Award

Funding Information Service Board Member, Bridget Gerrie, won this award in her role as Fundraising Manager with the New Zealand Historic Places Trust Pouhere Taonga. The mission at New Zealand Historic Places Trust (NZHPT) is to identify, promote and protect the historical and cultural heritage of New Zealand. It is a national organisation, with 22 regional committees and a membership of over 22,000, many of whom have been actively involved in saving, protecting and caring for heritage buildings and sites.

Alongside these areas of work the Crown funds NZHPT for (maintaining the Register of historic places, areas, wahi tapu and wahi tapu areas; making decisions on archaeological authorities) they raise money for activities and projects that NZHPT, and the community, recognise as vital for protecting heritage and educating both New Zealanders and visitors from overseas. NZHPT also manage and care for a portfolio of 48 nationally significant heritage properties on behalf of the people of New Zealand.

Bridget explains what key strategies she used and how she achieved this excellent campaign. Well done Bridget!

I was really thrilled when I found out I had won the Award for Excellence at the Fundraising Institute's Annual Awards Dinner held at their conference in May 2010.

In the picture are (from left) Johan Vos from FINZ; me, Andrew Smith from NZ Post and Gary Klocek from Marketing Impact.

While grant applications to Trusts is a vital part of the NZ Historic Places Trust fundraising programme, it is really important that we are not too dependent on any one source of funding as we build up a sound financial base.

Developing a donations programme is another of the four areas in our Fundraising Strategy (the other two are sponsorship and bequests).

A lot of agony, worry, blood, sweat and plain hard work had gone into the donations programme and this campaign, and I worried that we would be compared unfavourably with other long-standing regular giving programmes. So it was great to know that The Fundraising Institute of NZ had taken more than just short-term financial gains into account.



While the financial results of the appeals were good for us, I knew they were only the beginning, and that developing long-term relationships with financial supporters will achieve the best outcome.

The campaign consisted of two Appeal Letters, sent to active members, magazine subscribers and donors. As well, we included one full-page advertisement in the Summer 2009 issue of our quarterly magazine Heritage New Zealand. NZHPT is a membership organisation, and we needed to make sure that any fundraising initiatives did not impact adversely on membership. Our entry was a five-page document, a page of financial details, and included samples of the letter pack we sent to members.

Our campaign objectives were:

1. Establish a donations programme so that members understand our needs
2. Increase income from donations
3. Raise the issue of bequests
4. Convert Members into Donors without a negative impact on membership
5. Educate staff, board members and volunteers about the benefits of donations

We wanted to inform members, in more detail, of the needs of the organisation and to show them how they could help. We also wanted increase the number of opportunities for them to make additional donations to the Trust's work, instead of just hoping they would include a bit extra when they renewed their subscription each year.

Marketing Impact were our partners in producing the two Direct Mail letters which were our entry into the awards. They helped us tell the stories of our organisation - how to present our case, how to explain why we needed help to preserve our heritage and why we felt it was so important for future generations. They also saw the need to bring in key direct marketing tactics such as speaking relevantly to each audience, making the letters more personal, reflecting back and thanking those we had donations from before, and prompting for a higher donation.

We found the key to achieving good success is an open and respected working relationship – me as the client and Marketing Impact as the agency. We have regular meetings where we discuss the strategy and the creative and together debate and agree on an approach – each respecting the views of the other. We find it helps to have an agency who is prepared to challenge our ideas and yet is prepared to work with compromise.

The results of our campaign have been really good. A number of people have asked for information about bequests, and a small number have confirmed they have included NZHPT in their wills.

We have increased income from donations for NZHPT this year, and shown how we can expect this to continue in other years.

The long-term benefits to the organisation mean we are developing a body of supporters who are not only active members but are also donors – and a growing list of people who can be used to form the basis of future special appeal and bequest campaigns.

## Sales and Liaison

It's been another busy few months for me – I've seen a lot of Auckland and snippets of other bits of the country too!

My recent trips have been very varied and interesting – meeting with a range of stakeholders, attending all sorts of funding related events and doing presentations for a number of different organisations and groups to educate them about funding and how our products can assist them.

A number of funding expos have been held around the country which we have attended to introduce people to FundView, BreakOut and CorporateCitizens so that they are able to find potential funders for their organisations and projects. These have been well attended and have provided a good opportunity for us to show people through FundView.

I have also been attending a number of school and tertiary provider events to inform students of BreakOut and educate them about how they can find and apply for scholarships and grants to assist them with funding their tertiary education. The Maori and Pacifica Finance evening at The University of Auckland was a particularly well attended and informative event which attracted a number of year 13 students and their families from colleges around Auckland.

We have had a huge uptake of school subscriptions to BreakOut over the last few months. Careers staff use BreakOut to find relevant, up to date scholarship information for their students and also provide BreakOut as a resource for their students to use to find information for themselves. For those wanting to apply for scholarships for next year, some applications are closing soon so keep an eye on the calendar in BreakOut to make sure you don't miss them!

From here it's goodbye from me as I'll be leaving FIS mid September to embark on my big OE!

I have really enjoyed my time at FIS and have been lucky to meet so many great people on my various trips around the country. My final day will be 16th September so feel free to contact me before then if you need to. After that date, there will be a new Marketing and External Relations Advisor who will be happy to help.

Jennifer Whooley

Sale and Liaison Advisor.



NZFWO are delighted to introduce our new sector colleague - Logan McMillan. Logan was appointed Community Enterprise and Project Development Manager at the New Zealand Federation of Voluntary Welfare Organisation's (NZFWO) in July.

Logan has a degree in Social Practice, majoring in community development, and a corporate background in sales and marketing.

Logan's position, based in Auckland, is a shift away from Wellington; aimed at enriching NZFWO's national engagement, capacity building and resourcing of the sector.

Being an Aucklander – Logan underwent a sustained Wellington inoculation, an induction that fortuitously coincided with ConnectingUp Australia's annual visit (the Federation's partner in TechSoup New Zealand). This early intro was of great benefit, as



Logan's new role is charged with administering TechSoup New Zealand.

TechSoup New Zealand is an IT programme in which corporates partner to extend the reach of their generosity/corporate citizenship initiatives. Essentially, they make their IT products available to our sector at either donated or at a significantly discounted cost.

TechSoup New Zealand, along with Microsoft—the principal donor—were recent finalists in the Prime Minister's Social Heroes' Awards administered by the Robinhood Foundation. Logan says that NZFWO was really proud that Microsoft, along with TechSoup New Zealand, were nominated.

"It was a great acknowledgement that our hard work, coupled with Microsoft's generosity in getting \$7.6 million of donated software out to not-for-profit organisations in two years had not gone unnoticed."

We here at the Funding Information Service are also excited about the future of TechSoup New Zealand, because of the digital capacity-building opportunities it affords our sector, particularly with bargain-basement prices for computer software and hardware. So, if your organisation isn't already registered, we encourage you to do so by visiting. It's free and it's really very simple.

In addition – you too can help build sector capacity – and help bring to an end organisations paying too much for their IT-related products and services. If you've got a conference, newsletter, publication or event coming up, let Logan know at so he can make arrangements to be there or supply you with information.

Welcome Logan!



**Te Ratonga Whakamārama Pūtea**  
**Funding Information Service**

PO BOX 1521, Wellington, New Zealand Phone: +64 4 471 8900  
Fax: +64 4 472 5367 Website: [www.allaboutfunding.org.nz](http://www.allaboutfunding.org.nz)

# New guides on charitable tax changes

Nineteen different information sets have been created by the OCVS to highlight the key benefits of payroll giving and offer ideas to promote payroll giving and overcome barriers to its introduction.

They also explain recent changes to the tax treatment of volunteer reimbursements and honoraria, and the lifting of the cap on tax credits for charitable donations.

Information has been designed for specific audiences such as Maori, the arts, sports groups, recreation organisations, churches, schools, fundraisers, employees, corporates and small-medium businesses.

Donee organisations/charities have key roles to play in encouraging their existing supporters to consider how they want to give of their time and/or money. This might include supporters actively requesting payroll giving in their workplaces. Donee organisations that employ staff can also set an example by implementing payroll giving in their own workplaces.

Research on giving indicates that approximately 794,000 people in employment are already committed givers (ie: making regular contributions of time or money to causes that are important to them). By switching to payroll giving, many of these workers could potentially get money back that they might not have claimed from Inland Revenue in the past. This effectively makes donations more affordable, which may encourage some people to increase the amounts they give.

The guides are:

- \* It's now easier to give: Information for employees
- \* It's now easier to give: Information for small to medium enterprises
- \* Making it easier to give: Information for corporate companies
- \* Making it easier to give: Information for fundraisers
- \* Making it easier to give to early childhood centres
- \* Making it easier to give to schools
- \* Making it easier to give to tertiary and research institutes
- \* Making it easier to give to Maori organisations
- \* Kia mama ake te tuku koha ki nga whakahaere Maori
- \* Making it easier to give to Pacific Island organisations
- \* Making it easier to give to arts and cultural groups
- \* Making it easier to give to environmental groups
- \* Making it easier to give to social service providers
- \* Making it easier to give to international aid organisations
- \* Making it easier to give to health organisations
- \* Making it easier to give to recreation and social clubs
- \* Making it easier to give to sporting organisations
- \* Making it easier to give to religious organisations
- \* Making it easier to give to registered charities

To download and print the version most relevant to you visit:  
<http://www.ocvs.govt.nz/work-programme/three-key-projects/payroll-giving.html>  
A limited number of hard copies are also available, e-mail: [ocvs@msd.govt.nz](mailto:ocvs@msd.govt.nz)

# Auckland Council Funding Update

Funding support for community led projects and initiatives are an important part of Council business. The current Auckland Councils administer a number of contestable funding schemes. Funding was available for small local projects to large multi-year capital development projects. The availability of funding for community led projects is likely to continue under the Auckland Council.

Due to the transition to the Auckland Council, the current councils were asked to distribute all contestable funding for the 2010/2011 financial year by the 31st of October 2010 to make use of existing funding purpose, policies and boundaries. New funding for the Auckland Council will be available from the 1st of July 2011.

The Auckland Council is yet to determine how community funding will be administered. Funding can be administered by the governing body, single local boards or a collection of local boards depending on the nature of the fund and council priorities. An interim or final council determination of the availability and administration of contestable funding for the 2011/2012 financial year will be posted on the Auckland Council website when available [www.aucklandcouncil.govt.nz](http://www.aucklandcouncil.govt.nz)

# Kia Tutahi- Standing Together

The regional hui are over and submissions are now closed but there is some useful information and discussions around this agreement on the website <http://bangthetable.com/kiatutahi>



## Background

The Kia Tutahi-Standing Together steering group has developed a draft relationship agreement setting out a vision and principles for how communities and government can work together in Aotearoa New Zealand.



They held 17 regional hui during July and August, and met in Wellington with national lead community sector organisations and government officials to talk about the draft agreement and listen to what people have to say.

The deadline for submissions was 20 August 2010

## Where to now?

Following the consultation, the Steering Group will review the comments and revise the agreement. This is a tight timetable but it means that the agreement can be signed by the end of the year.

## The timetable for consultation is as follows.

Analyse feedback	August-September 2010
Publish results of the consultation	September 2010
Finalise the relationship agreement	September 2010
Seek Cabinet agreement to sign the relationship agreement	October 2010
Sign the relationship agreement	November 2010

# Funder Spotlight - The Lion Foundation

The Lion Foundation has been operating since 1989 and over the last 25 years has returned almost \$600m, that's over half a billion dollars to communities across New Zealand. There is no doubt that we help to deliver an enormous amount of good and there will few Kiwi lives that have not been positively touched by the work that The Lion Foundation provides.

We do though operate in a complex and sometimes controversial environment. There are some 47 Community Gaming Trusts in New Zealand and some 18,000 machines across the country. Every one of these trusts' machines is electronically monitored by the Department of Internal Affairs (DIA) who regulate the industry. The Lion Foundation is responsible for ensuring that the gaming environments we provide are safe for users, because a small percentage of individuals do have a problem with gambling, and for the distribution of grants. We also pay a levy amounting to millions of dollars each year to the Ministry of Health to help fund prevention and treatment programs and to pay for the work of the Problem Gambling Foundation who are opposed to the Community Gaming Model.

## So how does the Community Gaming Model Work?

Many people are surprised that for every dollar that is put into a Lion Foundation machine 92 cents on average is returned to the player; this figure is set by the DIA. This leaves 8 cents, of which the Government receives 2.4 cents, the pub and hotel owners 1.2 cents to house the machine, which also contributes to the local economy in terms of staff wages etc. A further 1 cent goes toward the operating cost of the machines and there is less than half a cent that covers The Lion Foundation's running costs. All in all that leaves 3 cents of the eight cents that is available for distribution in the form of grants. However, with the government's increase in GST this number is going to fall. The 47 different trusts have different approaches to the giving of grants and The Lion Foundation prides itself on being, unlike many others, a broad based funder. We distribute 40% of funds to Sport, 30% of funds to Community (which includes the Arts, Heritage, Culture and the Environment), 15% to Education and 15% to Health. Our aim is also to return 90% to the local community in which it is raised based on local authority boundaries, leaving around 10% for national causes such as St John ambulances, which The Lion Foundation buys, Coastguard vessels and operations, Surf Life Saving kit and equipment and a whole raft of other causes that benefit New Zealand as a whole.



## How much funding is available?

Philanthropy New Zealand figures indicate that the whole philanthropic spend from all forms of trusts and foundations in New Zealand is worth about \$750m per year and that over \$330m of that is generated from the Community Gaming Trusts. The Lion Foundation is the largest of these Trusts and last year was delighted to be able to return over \$37million to Kiwis across the country; this might be in the form of a few hundred dollars for a local bridge club to several thousand supporting a national sport. The industry is however currently in decline. Although the prevalence of problem gambling has stayed the same in spite of falling machine numbers and there appears to be no causal link between the numbers of machines and problem gamblers, Councils have nevertheless adopted Sinking Lid policies which will see fewer machines and a considerable drop in community funding over the coming years. This will not reduce problem gambling, but it will have a dramatic and negative effect on charitable organisations ability to provide their services. This is a great shame as the model works and with some industry reform can still be a model that New Zealand can take pride in.

The decline in funds is making life more challenging from a funding perspective. The Lion Foundation has seen a significant rise in the number of applications it receives a sign that charitable organisations are losing some of their traditional sources of revenue and needing more help. Unfortunately the increase in numbers means that not every good cause makes it across the line in terms of receiving funds. There are simply too many good causes for us to get behind them all. The current environment is causing the organisation to rethink some of its funding approaches and priorities so that we can continue to optimise the dollar we have for distribution. Our aim remains to be New Zealand's leading charitable trust, nationally recognised for helping people to achieve great things in the community.

If you are interested in learning more or in applying for funds please visit our website where you can download an application or find out what we have funded in your area. We are here to help and we look forward to hearing from you. [www.lionfoundation.org.nz](http://www.lionfoundation.org.nz)

