

Pānui

www.allaboutfunding.org.nz

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• Kevin's report - Moving Forward •

The first three months of my term has involved a lot of consideration between the Board, the Maori Advisory Group and Staff about what we want to be and where we plan to be, long term, and what we need to do, short term, to achieve this. It has been about adjusting because of change as well as planning strategically and operationally as Funding Information Service develops.

For the long term, a strategic plan was developed. For the short term, a Business Plan and a Budget for the 2006/2007 financial year were produced and these are subject to ongoing refinement. I have also reviewed our organisational structure and there have been some changes to promote the realisation of our plans.

During the 2005/2006 financial year, there has been much investment in new products such as the CorporateCitizens database and the rebranding of our stable of products FundView and BreakOut. In addition, we have updated our website and invested in improvements to our management of customer relationships such as subscriptions, contacts, funders and their funding information.

We have a challenge, partly as a result of our investments, with liquidity. A number of solutions have been considered and will be implemented which will address this. Your assistance in this matter would be appreciated; if there are expectations of late payments please liaise with Funding Information Service at the earliest opportunity.

Notwithstanding, the short term problem, Funding Information Service needs to focus on three particular themes for the remainder of the financial year:

1. Delivering a superb Information Collection of funding by:
improving the quality and quantity of funding schemes for the fund seeker
improving the responsiveness to change of the Collection for the funder and fund seeker
2. Increasing income by:
increasing subscriptions across all products, particularly CorporateCitizens
developing new income streams
3. Exercising prudent financial management by
rebuilding financial reserves
exercising prudence with expenses
improving financial management and reporting systems

Funding Information Service continues to provide a fantastic service for the community, for all New Zealanders. Whilst we have some work ahead, these are necessary improvements we need to strive for in order to be a sustainable and relevant organisation and leaders in funding information.

Ka pai nga mahi a muri, ka tika hoki nga mahi o mua - If the work put in beforehand is good, then so too, will be the work going forward

Customer communications, from fund seekers or funding providers, as feedback, success stories and suggestions are absolutely vital for Funding Information Service to be effective in providing the right service. Please contact myself or any one of the staff at Funding Information Service as your comments would be very much appreciated.

Ma tou rourou, ma taku rourou, ka ora ai te rawa nei - Through our joint efforts, this resource will prosper and grow.

Strategic Plan 2006 to 2009

Vision: Leaders in funding information

Mission: To be the prime provider of accessible funding information resources and expertise

Our **operating principle** that will guide Funding Information Service in its work is: Manaaki me te tiaki tangata - Nurturing and caring for people

Our **objectives** for Funding Information Service are:

Well known and recognised as specialists in funding information

Working to partner with Tangata Whenua

Develop new products, services and income streams

Promote the relationship and interests of fund seekers and funders

Be an innovative, strong and developing organisation

Strong governance and management infrastructure

Employer of choice

Our shared **values** that underpin Funding Information Service and its work ethic are: Teamwork, Integrity and respect, Celebrating success and achievements, Excellence in service delivery and Innovation

Check out www.allaboutfunding.org.nz

FundView and BreakOut Stats

FundView and BreakOut Information Collectors are constantly looking for new records to list on our databases. Recent additions are:

FUNDVIEW

There are currently 665 published records on FundView, of which 546 are active. New records include the Ngai Tahu Fund, Palmerston North City Council's Local Initiative Fund and Event Funding Scheme, Outward Sound, the Housing Innovation Fund, Shares for Good and the Wellington City Cultural, Economic, Social and Environmental Grants.

Highlight:

Prior to July 2006, Wellington City Council had a number of separate community grant schemes. These have been combined into four grants pools, Wellington City Council Environmental, Economic, Social and Cultural Grants. The closing date for all the schemes is 30 November 2006.

BREAKOUT

There are 23 new records in BreakOut, bringing the total to 2,395 of which 1,683 are active. The new records are from The University of Auckland, The University of Canterbury, Foundation for Research, Science and Technology, Fairfax New Zealand Limited, New Zealand Netherlands Foundation Inc. and Cookie Munchers Charitable Trust.

Spotlight

The Davis Dyslexia Correction Course Scholarship from the Cookie Munchers Charitable Trust offers a number of full and partial Scholarships to children aged 8 to 18 around New Zealand to attend the Davis Dyslexia Correction Programme.

Keeping it Legal

This online legal resource for community and voluntary organisations has had an extreme makeover! The rapid distribution of the first print run of Keeping it Legal created an opportunity for OCVS and the NZ Federation of Voluntary Welfare Organisations to incorporate feedback received from users of the resource, and make changes - both online and in print.

The changes include developing a separate factsheet on Contracts, further clarifying the law relating to charitable trust boards, volunteers, and sexual harassment, and updating information relating to the Charities Commission.

www.keepingitlegal.net.nz

Community Funding Expos

NELSON

Over 350 people attended the Expo on the 4th August, Saxton Field Pavillion, seeking information and helpful hints on "how to, where to and when to apply for funding/sponsorship". Presentations included; Gaming Machine Trusts, Canterbury Community Trust, Charities Commission, Lottery & COGS, Funding Information Service database and Sponsorship to a consistently packed hall. The stalls ranged from the two local councils through to the ASB Bank and the Gingerbread Factory. The Expo was initiated and managed by Judene Edgar of Tasman Fundraising and Development with support from the Local Government and Community Branch of Internal Affairs. As the Community Funding Expo was so successful, other similar events will be planned in the near future.

AUCKLAND

The ASB Trust held a community funding event at Manukau's Telstra Clear Events Centre on July 31, in conjunction with their annual public meeting.

Events included a funding workshop, presentations from community groups and a "funding fair" where key groups set up information stalls and discuss projects with community group representatives.

Funding Information Service had a stall which was swamped with people interested in FundView and CorporateCitizens in particular. "It was really great to meet people from such a wide range of community organisations and tell them of the funding opportunities and information available to help them in their endeavours" said Natasha McDougall, Marketing Manager, FIS.

15 minutes of fame

Kevin Haunui featured on Maori Television programme Ari Kaa.

The programme covered and Kevin showcaes services that FIS have for Maori to benefit from - check out our website to view this programme.

AGM

Funding Information Service AGM

Tuesday 10 October 2006

Transpower House, Ground Floor, 111 The Terrace, Wellington 5.30pm -6.30pm.

Please RSVP to Marian@fis.org.nz.

THE ROLE OF LEADERSHIP IN BUILDING A STRONG COMMUNITY AND VOLUNTARY SECTOR



Greater investment needs to go into leadership in the community and voluntary sector, according to visiting Canadian grantmaker Bob Wyatt.

Mr Wyatt, who was brought to New Zealand by Philanthropy New Zealand for the Funders Forum held in Wellington in May, is the chief executive of one of Canada's largest private foundations, the

Muttart Foundation.

In his addresses to the Forum, Mr Wyatt provided a practical perspective on the role of strong leadership in building a strong community and voluntary sector and maintaining effective relationships between funders and fundees.

To ensure the health of the community and voluntary sector, Mr Wyatt identified four types of leadership that need to be considered – sectorial leadership, organisational leadership, individual leadership and funding leadership.

Mr Wyatt said funders had a responsibility to ensure that voluntary organisations were as strong as they could be, including supporting infrastructure.

"I fear, however, that as funders, we tend to do things that weaken voluntary organisations, rather than strengthen them. Of these, the most insidious, I suggest, is our determination to fund projects, rather than organisations. In doing this, we have forced voluntary organisations to operate in silos within silos."

Mr Wyatt said his own Foundation had looked at this issue and had subsequently made a fundamental change in the way it funded – to invest in organisations, rather than projects.

"We decided that we should ask organisations to come to us and tell us what was holding them back from being as effective as they could be, and what they thought should be done about that. From that point, we could engage in a conversation about how best we could provide funding that overcame those issues.

"And if we're successful in doing that, then the leaders of those organisations can start to act as leaders of a whole organisation, rather than try to spend all of their time hobbling to fund overhead costs from a series of discrete budgets – budgets that, all too often, provide insufficient funding in the first place for the costs necessary to do business.

The Foundation had also decided, for the first time in almost two decades, to consider applications for core funding.

Mr Wyatt said to build a strong sector also required greater investment in the leaders of individual organisations.

"No one can deny that voluntary organisations require strong leadership if they are to be effective. And yet, we give the CEOs of this organisation little

opportunity to think about bigger-picture issues, to look at root causes of problems rather than band-aid solutions, to meet with peers and have in-depth discussions about matters of concern.

"Instead, we ask them to deal with daily crises, some caused by clients, some – maybe more – caused by funders."

Studies in the United States and in certain parts of Canada showed up to 70 per cent of voluntary organisation CEOs expect to leave the sector in the next five years.

Mr Wyatt said New Zealand needed to think about the potential of more initiatives to support leaders in individual organisations, in addition to the work going on by UNITEC in providing senior training opportunities for leaders in the voluntary sector and the J.R. McKenzie Trust, ASB Trust and the Southland Community Trust, who subsidise the cost of voluntary-sector participation in Leadership New Zealand.

He also called for funders to work together more.

"Within our geographic communities, within our communities of interest, within our various types of funding bodies, we need to find ways of meeting regularly, to learn from one another, to become better at what we do and even, I daresay, to try to learn what it is that we do that is not as helpful as we would like."

He said this should include creating "a safe environment within which we can talk with one another and perhaps even a safe environment in which our grantees can tell us what is helpful and what is not".

"We have way more in common than we have differences between us. And when we come to learn that, we will have taken an important first step about being leaders within our own profession," he said.

Bob Wyatt has been executive director of The Muttart Foundation since February 1989. He assumed the position after a career in journalism and public relations and after serving as a director of the foundation for almost three years.

Since becoming involved as a grantmaker, Bob has been worked on issues related to charities on a local, regional and national level. He has led ongoing consultations between government and the sector on issues of regulatory reform. He spent 2005-06 on a Staff Fellowship, carrying out research while based at the Centre of Philanthropy and Nonprofit Studies at Queensland University of Technology, Brisbane.

"As general Manager of Funding Information Service, I fully support Bob Wyatt's message that investment in the community and voluntary sector is needed to build a strong sector. There is a wealth of information and knowledge in the leaders of the community and voluntary sector which needs to be acknowledged and added to by investing strategically in leadership development and networking "says Kevin Haunui.

Full speech notes are available at www.allaboutfunding.org.nz/speeches

Thank you to Philanthropy New Zealand for this article.

Bridget Gerrie - Board Member



I've worked as a paid fundraiser for Royal NZ Foundation of the Blind, Arthritis New Zealand and now Barnardos New Zealand where I've been for five years. I find the not-for-profit sector not only rewarding as in the "giving back" sense, but also because it offers so many wonderful opportunities to try new things, meet an amazing variety of people, and travel to places in New Zealand where I've never been before. The not-for-

profit sector is well known for offering employees poor financial rewards but great life experiences!

I was lucky and managed to have time at home when my children were small, and then to develop a career for myself once they were grown. I've studied management at Victoria University as a mature student, and I've been able to take advantage of fundraising education and qualifications when they've been available in New Zealand. Although we're on the other side of the world from most professional fundraising organisations, we are very well served here by international experts, who like to take the opportunities offered by conferences and training to visit New Zealand.

In my work as a fundraiser I am well aware of the value of the Funding Information Service's products. I have used FundView for many years and I'm always recommending BreakOut to family and friends who need support with their study or sport or those who are struggling artists. I was involved with CorporateCitizens from an early stage, as part of the focus group and have found it very exciting watching it grow and succeed.

I've been in governance roles in the past with Playcentre, The Embroiderer's Guild, YWCA of Wellington and the Fundraising Institute of New Zealand, and I'm currently on the boards of Volunteer Wellington and the Funding Information Service. I'm hoping my skills will contribute to their work, but I'm expecting to enjoy myself as well because they're all lovely people at the Funding Information Service.

Susannah's farewell

With a tinge of sadness, but ultimately hearty good cheer, we wish Susannah all the best with her future career at the Ministry of Social Development.

Susannah has been with Funding Information Service for almost six years and we will miss her information collection skills and experience and also her lovely smile.

Sales and Liaison - Position vacant

Kevin Haunui has taken up the role of General Manager so the sales and Liaison role is being shared at present by Natasha McDougall (Communications, Marketing and Sales Manager) and Kevin until a new appointment is made.



Please contact us if you are holding an expo or event that you would like our input on.

Upcoming events we are attending include

NZCOSS Conference in Ashburton 17 - 19 October 2006.

Funding Expo in Porirua - Date to be confirmed.

NZCOSS

Conference 2006

Raraka Korero: Weaving Our Stories.

17 - 19 October 2006, Hotel Ashburton Conference Centre, Ashburton.

Every two years, the New Zealand Council of Social Services hosts a sector-wide conference, bringing together people from throughout the community and social services sector. This biennial event is an opportunity for all those working in the sector to share their insights and experiences.

The Conference is open to all interested people working in community and social service organisations.

The Conference theme this year focuses on how we share and communicate information in the sector. Themes include:

- data gathering, training and research in local communities;
- sharing information, sustaining organisations and nurturing our people;
- initiatives in information technology, including the Digital Strategy, and working with the media;
- developments in social research and community work

For more information about the Conference, please contact Conor Twyford on 04-472 3364



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Registration of New Zealand Charities

Since we last featured the Charities Commission in our Panui back in June, the key dates for registration under the new Charities Act have changed.

The Charities Register will now open to receive applications for registration from 1 February 2007. Existing charitable organisations will need to register before 1 July 2008 to continue to be eligible for exemptions from income tax and gift duty. On 1 July 2008, the tax laws will change, making registration as a "charitable entity" under the Charities Act a pre-requisite for charities wishing to retain or obtain these tax exemptions. There is a 17-month period (1 February 2007 – 1 July 2008) to register before any existing tax exemptions are affected.

Guidance material available

If your organisation is considering applying for registration, we encourage you to visit the Charities Commission website, www.charities.govt.nz. There's a range of helpful information there, including a series of Fact Sheets on topics like officer certification and when to register. You can also download and keep handy a Registration Checklist, a Glossary and draft registration forms. For those without Internet access, copies of guidance material can be requested by calling the Charities Commission, free, on 0508 242 748.

Keep up to speed

The Charities Commission is developing more educational resources in the lead up to the launch of the Charities Register in February. The best way to stay informed of what's available and when is to subscribe to Update, the Commission's monthly email newsletter. To subscribe, send your contact details to info@charities.govt.nz.

Obituary



Kua hinga te totara nui o te wao nui o Tane
A giant totara tree has fallen in the great forest of Tane

Funding Information Service joins the chorus, of many thousands of New Zealanders throughout Aotearoa, in honouring the passing of Te Ariki Nui, Dame Te Atairangikaahu.

We honour her grace, her humility and her lifetime of work in attending to the dreams

invested in her by the people.

Haere atu ra e te whaea. Whaia te ara tapuwae o nga tipuna ki te kainga tuturu o te tangata.

Haere, haere, haere atu ra.

To the whanau pani, the bereaved family, we extend our aroha to you at this time and also to the iwi kainga, the home tribes, ki a Tainui waka; kia kaha, kia maia, kia manawanui.

Mate atu he tete kura, ara mai ano he tete kura
He piko he taniwha, he piko he taniwha

SKYCITY Hamilton Community Trust

Radio is a powerful medium. It's challenging and exciting - and Community Radio Hamilton wants to give more young people the chance to have their voices heard.

One group of young people already hitting the airwaves, are the Canteeners. Featuring interviews with teenagers living with cancer, the show provides information about the realities of the disease. President of Canteen Waikato Stephanie Richmond says that the show is to ensure that no young person living with cancer should ever have to feel that they're alone.

"The show is the voice of Canteen – and it's awesome!" says Stephanie.

A grant of \$5,000 from SKYCITY Hamilton Community Trust will help Community Radio Hamilton in their goal to further increase the youth content.

"The funding from SKYCITY Hamilton Community Trust is a big help towards our search for new exciting youth shows," says Phil Grey, Community Radio Hamilton's General Manager.

"It has enabled us to make contact with schools and students, and to create advertising and information packs. As a result we're looking forward to hearing lots of new young voices talking about what really matters to them on the radio."

Our thanks to SKYCITY Hamilton Community Trust for providing this article.



Caption: DJ's Fiona Hayworth, Nick Stairmand and President of Canteen Waikato Stephanie Richmond line up as "Canteeners On Air".



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Classifying non-profit institutions.

The community sector in New Zealand is huge but invisible – that is, at present we do not know how much the sector contributes to GDP, or how our sector compares to those in like countries or indeed in very different countries.

There are several initiatives to do something about this and the main two are linked together. For several years, Johns Hopkins University in the US has conducted a study of not-for-profit organisations in as many as 35 countries. NZ has joined this study and Massey University is the local research agency for it.

As part of the preparation to take part in this study, Statistics NZ have been working on creating a satellite account, to operate in parallel with the NZ System of National Accounts. The satellite account requires a new coding framework for New Zealand. While international comparability is important for research and knowledge purposes, it is also imperative that the coding framework reflects our unique context, for example our Treaty relationship and its implications.

Statistics NZ have therefore adapted the International Classification of Non-Profit Organisations (ICNPO) from the United Nations Statistical Division for use in NZ. The ICNPO groups are based on the primary activity of the not-for-profit organisation (eg health, social services) and not on its target audience (eg youth, women).

Each organisation will be classified only once so if it undertakes activities in several categories, a “primary” activity will be identified and used.

Modifications for the NZ context include subclassifying education to separate early childhood from primary and secondary education. Many Maori organisations, while fitting the general definition of a not-for-profit organisation, work with iwi and hapu across all activities and throughout life, over generations, and so, to reflect this broad role, these will be classified as “tangata whenua governance” under “Economic, social and community development.”

Organisations may be used to describing their activity under the Australia New Zealand Standard Industrial Classification 1996 (ANZSIC). To operate the satellite account it will be necessary to bridge between these two schemes

While it may sound dry and “behind the scenes”, this is exciting work for the community sector – once this information starts to be collected we can get some realistic assessment of the contribution our sector makes and its true value to New Zealand.

Full information can be obtained from Statistics NZ at

<http://www.stats.govt.nz/developments/measuring-the-value-of-community-organisations.htm>

You can obtain a copy of the document *Classifying Non-Profit Institutions*, June 2006, from the contact details listed there.

Or at our website www.allaboutfunding.org.nz in the recommended reading section.

CorporateCitizens going strong

It has been a year now since the combined efforts of Funding Information Service and Saint's Information launched Corporate Citizens and we now have 100 of New Zealand's leading companies listed on the database.

This milestone would not have been possible without the hard work, tenacity and general take-no-prisoners attitude of Saint's Commander in Chief, Louise Parkin, who has toured the country conducting the interviews and carrying out the research that helps to make Corporate Citizens possible.

Although Louise will still be actively involved in the project, she is handing over much of the behind the scenes work to Catherine McCullough and we thought we'd take this opportunity to introduce her to you all.

Catherine originally moved to Wellington from the Waikato to pursue her studies and despite a propensity for taking off on random and sometimes global adventures, the lure of the Windy City keeps bringing her back.

She joined Saints at the beginning of 2006 because she feels that you shouldn't waste whatever time you have supporting organisations you don't believe in and loves the fact that she is helping to make a difference every day.

Obsessed with gaining knowledge about the world, she is currently finishing off a Masters in International Relations and trying to figure out what she wants to learn about next.

In between work and study, Catherine is a trustee of the NRG charitable trust and is currently developing a project which focuses on expanding definitions of entrepreneurship and creating collaborative communities. Her passion for the latter in particular is what excites her about being involved with the Corporate Citizens project and she has made it her personal mission to encourage maximum participation by the corporate sector.

Her hobbies include dancing, music and having existential conversations with taxi drivers during the wee hours of the morning.

Catherine is interested in social justice and environmental issues and has a specific background in human rights.

CORPORATECITIZENS

The first port of call for organisations looking for mutually beneficial relationships with businesses offering volunteering, mentoring, sponsorship, gifts in kind, loans and other initiatives.