

Pānui

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2008 – The Year in Review! 2009 – What's Ahead?

Kia ora koutou - Obama, Key, Funding Information Service - It has been a momentous year for politics with the election of Barack Obama to be President of the United States of America and John Key as Prime Minister of New Zealand. In both cases the political desire for changes has come through heightened by the international economic challenges currently being experienced.

Ominously the economic challenges may signal a squeeze on funding for the grant seeking community over the next 12-18 months, as grant making organisations from Government to Trusts and business consider what they have or don't have to work with the community.

Good, reliable and up-to-date information that is in FundView, BreakOut and CorporateCitizens will be vitally important for community organisations during this time and my message to grant making organisations or corporates is kia kaha, kia maia – the next 12 months may be exceptionally testing but ongoing positive engagement with the community will only benefit you.

For Funding Information Service it has also been a dynamic year with changes in staff and board being managed together with the issues to the forefront of our focus;

- keeping things simple and practical
- look for and develop income diversity
- keep an eye on what things we need to focus on.

We are continuously looking to improve the quality and delivery to the services that we provide and I am pleased to report that we are on track with this focus. This year we have been developing our organisational strategies to operate smarter, more efficiently and effectively and I am confident that our customers and stakeholders will have seen evidence of this throughout the year. My thanks go to all staff, Natasha and Jennifer, John, Prabir, Pam and Keith, Nick, Moana and Laura for their hard work and commitment to Funding Information Service in 2008, as well as Gillian and Jolly,

Board to Funding Information Service

Elected at the AGM in October 2008 to the Board were sitting members Greg Bishop, Tina Wehipeihana-Wilson, Bridget Gerrie, Gail Munro, Tagaloa Peggy Fairbairn-Dunlop and new members Raphael Hilbron, Ann Pala and Kim Morton. I welcome Greg Bishop as the new Chair of Funding Information Service and again reiterate my thanks to outgoing members, Tu Williams (ex Chair) and Chris Roberts.

I also thank sitting and incoming board members for their support and commitment. In particular I would like to acknowledge the great work of this year's board reflected in the change to the society rules that will allow much better development, use of board expertise and succession of board knowledge in the future.

Huri Rauna – Round Up

"Building Sustainable Organisations - the People Factor" was the theme to the Federation of Maori Authorities Conference held in Rotorua, 7-9 November. In particular there was strong focus on how the leaders and governors of Maori authorities can develop the capability of their people and organisations to participate in future opportunities. Funding Information Service had a more significant presence at the conference this year and attracted quite a few attendees enquiring about the products and services it provides and it will look at joint possibilities further with an iwi runanga.

The Funding Information Service AGM was held 8 October 2008 in Wellington at the premises of KPMG. Preceding the AGM was a panel discussion on Corporate Community Involvement and highlights from this are discussed in a separate article of this Panui edition.

Elsa, Aorangi, Marian

Congratulations to Rachael Mansfield and Rod for the arrival of their first baby Elsa on 6 November, also to Tina Wehipeihana-Wilson and Tem on the arrival of their 4th baby Aorangi on 12 November and to Marian Cadman in a new role as Membership Officer with ASTE and AUS (Assn of Staff in Tertiary Education and Assn of University Staff).

Merry Christmas and a Happy New Year

Enjoy the summer months ahead. We look forward to your company in 2009 na reira kati ra i konei, tena koutou, tena koutou, tena ra koutou katoa. Kevin Hanui, General Manager.



Check out 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 760 published records on FundView, of which 620 are active. 16 new records have been added in the last 3 months. New Records include The Richard Hadlee Sports Trust; Four Winds Foundation Limited; ASIA: NZ Conference Sports Grant; ASIA: NZ Culture Grants and The Dame Malvina Major Foundation

Highlight: The Dame Malvina Major Foundation.

The Dame Malvina Major Foundation was launched in 2007 and offers grants categories that are earmarked for local performers in varying stages of their development. The committee seeks to support predominantly young Taranaki performers and provide educational and training opportunities specifically designed to assist and develop the skills of Taranaki youth associated with the performing arts.

BREAKOUT

There are 84 new records in Breakout, bringing the total to 2878 of which 1857 are active. The new records are from the Broad Memorial Fund Award; Evelyn Stokes Memorial Doctoral Scholarship; BRCSS Doctoral Completion Award; BRCSS Masters Research Award; Statistics New Zealand's Student Assistance Scheme and Winsborough Ltd Scholarship in Organisational Psychology.

Spotlight: BRCSS Masters Research Award.

BRCSS Masters Research Award - (Building Research Capability in the Social Sciences) is a collaboration of established social scientists from New Zealand's eight universities and one community organisation. BRCSS has funding to June 2009 from the Tertiary Education Commission with which to build social science research capability and support the development of innovative research programmes.

The purpose of the Award is to build research capability among emerging researchers in the social sciences in Aotearoa/New Zealand.

CORPORATECITIZENS

The First port of call for organisations looking for mutually beneficial relationship with businesses offering volunteering, mentoring, sponsorship, gift in kind, loans and other initiatives.

A Recently added Corporate Business is **Adshell New Zealand Ltd** - Adshel is an out of home advertising company formed in 1997. Adshel aims to provide unique and innovative advertising and infrastructure solutions for its clients. Adshel is passionate about their products and the role they play in the community. They are committed to working with their community partners, charities and arts organisations to offer media space across Australia and New Zealand. In addition to this they encourage staff involvement and participation in the local community. Full details are available to subscribers at corporatecitizens.org.nz.

Funder Liaison Team

A new member to the team - Laura Surrich

Laura has been with Funding Information Services for 3 months as a Funder Liaison team member, liaising with funders, updating and adding new schemes to our FundView and BreakOut databases. Laura also processes Fundemet edits, that are generated by the funders making changes online to their schemes, ensuring they are correct and ready for publication to our internet based products. Laura comes to FIS from Trustees Executors, where she was the Office Administrator. She has interests in modelling



and acting. Her last television appearance saw her co-host the NZ Poker Championships held in Christchurch last year with Mike King. Her latest acting role was filmed just a couple of weeks ago, where she appeared in a feature called 'The Truth about Men'. This is set for release in the middle of next year.

Coach of the Year - Profile.

We are really proud of our Funder Liaison team member, Moana Pointon, who was honoured with the College Sport Wellington 2008, Coach of the Year Award, for her fantastic support and leadership of the Wellington East Girls' Softball Team who received the College Sport Wellington 2008, Team of the Year Award.



How long have you coached: Seems like forever, but over twenty years, from Tiny tots to Age Grade representative level.

What do you enjoy most about coaching: Immense pride for those players, that I have had the pleasure of coaching who have gone on to attain higher honours.

What message would you give an aspiring young player: We all have talent, your journey has started, Determination, Motivation and Self Belief comes from within, take it and go for the ride, the skys the limit.

What interests do you follow in your free time: I have six interests, Ash, Frank, Gary, James, Scott and Charlotte, whatever sporting code they play, you can almost guarantee, I will be there supporting them.

Favourite Movie: Muriels Wedding

Favourite Food: Anything thats cooked for ME.

How did you feel about winning the Coach of the Year award: To be honest, shock, horror and once it sunk in, I was absolutely delighted. To be nominated as a finalist was great and to win was the icing on the cake.

Well done Moana.

Nick at the elections - US that is!

Our Manager Subscriber and Funders, Nick Archer was in Chicargo for the Barack Obama win and happened upon a TVNZ camera crew and got his 15 minutes of fame. You might have caught him on TV One giving his insight into the historical win and all on his first trip out of NZ!

Funding Information Service AGM Panel Discussion

Our Annual General Meeting in October 2008 included a panel discussion on the reasons, values and motivation for corporate community involvement.

Chaired by Louise Parkin of Saints Information, the panel included Ann Pala, Raphael Hilbron, Dr Kathie Irwin and Dr Louise Lee.

The purpose for the panel discussion was to stimulate and engage the community on the topic of corporate community involvement as our observation and feedback from community and business alike is that this is still a development area for many.

Ann Pala discussed the ethnic, cultural and religious diversity that exists in New Zealand communities and the underlying motivation of building and maintaining positive relationships with each other and promoting mutual respect and understanding. She looked into barriers for ethnic groups and these included:

Lack of resources

For a corporate organisation to become involved in the community there must be a significant input of human resources to form relationships and plan and execute involvement. Many corporate organisations do not have the resources needed to commit to a relationship with a community group.



Ann Pala.

Lack of intercultural knowledge

Corporate companies may feel unsure about involvement with an Ethnic group as they do not have knowledge about culture, religion and other factors that may play a part in interacting with the group. Corporate organisations also tend to be unaware of what sort of support these groups need. Ann mentioned that ethnic groups are able to get sponsorship for festivals and events but find other support more difficult to obtain.

Lengthy process

Planning can be drawn out into a lengthy process before any action is taken. Ann also touched on the motivations of corporate companies and why they want to get involved in the community. The main motivation Ann discussed was the pride of an organisation when they see their logo associated with a community group. This gives the corporate a reputation as socially responsible and stakeholders can feel satisfied that the corporate organisation they are involved with is helping in the community.

Dr Kathie Irwin is secretary of Te Awe which is a Maori business networking organisation. Te Awe provides opportunities for its members to meet each month to network and share news, ideas, successes and challenges. Te Awe members range from small businesses through to large corporate companies. It is designed for Maori business with an associate membership which is available for non-Maori.

Raphael Hilbron based his discussion from his experience of corporate community involvement while working for Vodafone as Head of Corporate Responsibility. In 2001, Vodafone decided to become a values based organisation. Raphael said that this was a big undertaking as to do this, the entire organisation must be clear about what the company's values, beliefs and aims are and, get behind them. This required staff education and a change in the corporate culture of the company.

Vodafone's corporate responsibility is motivated by a "passion for the world around us" and its strategic goal to be a responsible business. This encompasses every aspect of business practice including, ethical supply chain purchasing, environmental awareness, product development, marketing and community involvement and support.

The corporate community involvement programme that Vodafone engages in is based on enhancing the reputation of the company rather than a monetary focus.

Raphael also discussed the issues regarding community groups approaching corporate organisations for funding. He said that company's get bombarded by many requests for money and these requests are often not well researched and planned to match the values of the organisation.

Raphael suggested that groups need to listen to and learn about the company and use this information to find a company that is in line with them. He refers to this as cultural fit and emphasised the importance of cultural fit as an essential part of a successful relationship between the corporate and the community group.

Dr Louise Lee presented the research perspective of corporate community development. She broke corporate community development down and focused her discussion on partnerships between community groups and corporate organisations.

From this she identified two key findings of recent research: motivations and trust. Partnerships are set up in a way that both parties benefit from the relationship. There are a number of different benefits that can be gained from partnerships between community groups and corporate organisations. This relates to the motivations for entering partnership relationships.

For a community group, the motivations to enter a partnership with a corporate organisation include:

- to overcome resource scarcity, in particular funding
- to enhance credibility by aligning with a corporate identity or brand
- to enhance the brand of the community organisation
- to have the involvement of another party to participate in and support activities that are linked to the service provision and purpose of the community group.

The motivations for the corporate organisation to enter into a partnership with a community group include:

- to demonstrate corporate responsibility.
- to build corporate culture within the company and to build employee morale through employee volunteering programs
- to create a positive reputation in the community.

Dr Louise Lee's fullnotes are available at our website, www.allaboutfunding.org.nz

In summary, the discussion highlighted why CorporateCitizens is such an excellent resource for corporates and community groups particularly as it allows Corporates to provide good information about their reasons and values for community engagement and for community groups to identify which corporates might be a successful fit for them.

We are very interested in continuing this discussion on corporate community involvement and extend an invitation to readers to join an email network for this purpose— please contact Natasha@fis.org.nz.

ASB Community Trust Book- Telling the Trust's tale

Te Kaitiaki o te Putea: The History of the ASB Community Trust 1998-2008, charts for the first time Auckland's philanthropic beginnings and how philanthropy has made a difference in our community.

Author Jade Reidy says Auckland has a reputation for focusing on acquiring money, as a city of quick gains and ruinous losses. "Less well understood is the story of how Auckland gave its money away – to create some of the city's major institutions.

"The history of the ASB Community Trust is inextricably tied to our colonial history. It's the story of land, religion and beer, of broken kinship ties and barren marriages which imposed misfortune upon many personal fortunes," she says.

The book tells the full story – explaining how major investment funds operate and beginning a discussion about how philanthropy must change if it's to go on being effective.

"Internationally, philanthropy is moving towards evidence-based grant making, real risk taking and models of sustainability," says ASB Community Trust CEO Jennifer Gill.

"A number of visionary and entrepreneurial family foundations are appearing and they're addressing issues of social change from the community up, rather than from the top down."

To enquire about obtaining a copy of the book, please ring the Trust on (09) 360-0291, 0800 272-878 or send an email to: info@ASBCommunityTrust.org.nz



IT Changes

Users of BreakOut may have noticed a recent change to the product highlighting funding schemes that have recently been added to the database. Subscribers to FundView will already be familiar with this feature, which has been part of FundView for some time. The word "New", in red letters, next to the scheme name indicates that the scheme has been added within the last 3 months. The "New" tag appears in both your search results and in the A-Z Listing of schemes.

Advance Notification of Service Outage

Wellington Community Net (WCN), our web-hosting service provider, have let us know that they will have to shut-down their servers for a physical move at some point during the next few weeks. The impact of this on subscribers is that all our products and our website will be unavailable for that time. WCN is working with us to try and find a time that will minimise the impact. When the time and date(s) of the outage is confirmed, we'll email all our subscribers.

Sales and Liaison

I have recently taken up the Sales and Liaison Advisor role at FIS on a year long contract while Rachael is on maternity leave. My role involves promoting the service at workshops, expos and conferences and meeting with users of the service around the country.



I am currently on summer break from Victoria University where I am very close to finishing my degree – Bachelor of Commerce and Administration. Aside from working at FIS and studying, I work part time as a waitress, play netball and dance.

Over the last month, I have been catching up with the few subscribers that are still receiving the CD for their FIS database access. We are considering phasing out the CD as most of our subscribers are now on internet subscriptions which they are finding much easier and more helpful than the old CD alternative.

The internet version of the database is much easier to use; there are no CD's to install and no need for downloads. The internet version provides completely up-to-date access in a user-friendly format, with new features and more advanced search functions.

We have had a great response to the change over and have received lots of positive feedback from those new to the internet version.

A few of you may have fallen through the cracks and if you are still using the CD, we would love to hear from you so that we can change you over to an internet subscription.

I have found some subscribers difficult to get hold of so if you are in this category please call or email me!

Natasha travelled around the south, calling in at Amberly, Hirinui, Oamaru, Timaru, Selwyn and Christchurch in October. In the last bit of this year and early next year I will be visiting some of our subscribers and funders around the greater Wellington Region.

We will also be attending funding forums, expos and conferences around the country. Please let us know if you are running an event so we can get it in our calendar ASAP. I look forward to hearing from you shortly. Jennifer Whooley, Sales and Liaison Advisor.



Rachael Mansfield, who many of you will have met as she travelled the country in our Sales and Liaison role, and partner Rod Tervoort are thrilled to be parents to Elsa Beth Tervoort, born 6 November - we are also very pleased at FIS and wish them all happiness.



Te Ratonga Whakamārama Pūtea
Funding Information Service

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ICT Team appointments



Keith Morris and Pam Loader have recently joined Funding Information Service, sharing the part-time Data Analyst position. The role involves creating and running reports for in-house use and for clients. Another important aspect of Keith's and

Pam's role is implementing processes and systems to ensure the integrity and consistency of the data in our various databases.

Keith went to Nayland College in Stoke, Nelson, the same High School as Nick Archer, our Support Manager Funders and Subscribers. Nick remembers Keith spending lunchtimes in the computer room at school looking at how various computer programs work and creating new programs. Keith is now applying those same skills for the benefit of FIS.

After completing a degree in Electronic Engineering from Caterbury University, Keith has spent over 10 years working mainly as a software developer & computer programmer.

When not at FIS, Keith works as an IT Administrator for the Open Home Foundation. Keith is involved with Toastmasters and his local section of the IEEE Computer Society. He lives in Upper Hutt with his wife Julie and newborn daughter Esther.

Pam grew up in Southland and moved northwards when she left school to attend a computing course at the Central Institute of Technology in Trentham. From there she began the first 15 years of her career, starting as a programmer and progressing to systems analysis roles, while working for the government in Wellington and Wanganui and Databank/EDS in Wellington. After taking a break to start a family, Pam returned to the work force last year.

Pam has three school-age children Hamish, Abby and Emma, and together with husband Perry, they keep her fully occupied when she is not working at FIS. When Pam has a spare moment she plays bridge, even attending the odd tournament when time permits.



Christmas and Holiday Hours @ FIS

Christmas, New Year, Wellington Anniversary Day & Waitangi Day.

The Funding Information Service office will be closed or providing limited services over the summer holiday season. The dates that the office will not be open are:

Thursday 25th December 2008 to Friday 2nd January 2009 inclusive

Monday 19 January 2009

Friday 6 February 2009

There will be staff at the office on all other days during normal business hours from 8.30am to 5pm; however some services may take longer to provide during 5-16 January 2009.

The services and resources offered through our website allaboutfunding.org.nz will be operating 24/7.

If you have any subscription enquiries please check the website first and if you require any further information email info@fis.org.nz. If you have any technical enquiries please email info@fis.org.nz

Shared Services in the NZ Not for Profit Sector.

At the Wellington ANGOA research forum, Kathleen Ryan presented her report for Raeburn House on the shared services in New Zealand for the not for profit sector. Raeburn House is an independent community resource and information centre focusing on mental health promotion and community development on the North Shore and Kathleen Ryan is an independent policy analyst, planner, researcher and facilitator. Kathleen's report came out of an interest by Raeburn House in shared services in terms of how it can work effectively within its community and to support community development. The report provides six models of shared services in the not for profit sector.

Umbrella

Legally established agencies can provide support for groups not legally established.

- To apply for grants and other funding.
- Provide support and advocate the goals, values and interests of the groups they umbrella.
- Provide infrastructure, accountabilities, support, expertise, information, resources and guidance required.

Co-location

This is when organisations share location space.

- To lower rental costs and other administrative expenses.
- Provide support and pool resources.
- Create a community hub with a central location.
- Enable governance arrangement for some community houses.

Collaboration or Partnership

These may be national, regional or local, with two national examples given involving the New Zealand Federation of Voluntary Welfare Organisations.

- ComVoices, a coalition to make visible the contribution of the voluntary sector.
- Community Information Management System (CIMS), which allows agencies to host their communications networks through a shared ICT platform.

Mixed Models based around existing agencies

Shared services undertaken through collaboration or partnership within the not for profit and voluntary sector may:

- Build on existing relationships, collaboration and partnership.
- Be between the not for profit sector groups and other sectors.
- Have some co-location aspects.
- Be a project across several agencies while retaining part of an existing agency.

Mixed Models based around new agencies

Where new agencies can result in collaboration by existing agencies or attract support from existing agencies.

- Mixed models can result in new agencies being set up to provide services and community needs.
- Can be an initiative by central and local government bodies, existing not for profit organisations providing support for new agencies and closer collaboration between agencies resulting in a new agency.
- Can be new agencies independently set up but attract wider support from existing agencies.
- Example of Kites which was set up in 2000 by four Wellington mental health services Wellink, Pathways, MASH and Te Roopu Whakapakari Ora Trusts to look at ways of working more effectively.

Other approaches

A further model is that of an organisation that chooses to engage with the not for profit and community sector to support the sector's development, in either the short term as a catalyst or the longer term.

Contact info@raeburnhouse.org.nz and 09 486 8989 for this report.

Charities Commission Trust and Satisfaction Survey Summary.



Adrian Shields

At a recent Association of Non Governmental Organisations Aotearoa (ANGOA) research forum held in Wellington on November 12th 2008 Adrian Shields from the Charities Commission presented a survey conducted by the Commission measuring the general public's level of trust and confidence in charities.

The survey was conducted by the Charities Commission with a dual

focus, to put in place an initial high level benchmark of the current state of public trust and confidence in the charitable sector to get a sense of what are the drivers that impact on that confidence.

The survey had a high response level with 2,121 members of the general public responding to an online and telephone survey by UMR's SAYit online research panel.

The nature of the questions used a scale from 1 to 10 where 0 means you don't trust at all and 10 means that you trust completely.

There were five main indications from the survey.

The level of trust and confidence in charities

- You trust completely, 58%
- Neutral, 32%
- You don't trust at all, 7%
- Unsure, 2%
- Mean 6.6, online 6.8 and phone 6.2

Charities Commission

- Have heard of the Charities Commission, 57%
- Given brief description those who placed high importance rating on the role of the Charities Commission, 78%
- Aware of the charities registration number, 22%
- Likelihood of requesting registration number in future, 50% yes, 28% no, 22% unsure

Strengths and needs in the sector

The strengths of the charitable sector were:

- Attributes of organisations, 29.1%
- Providing for needs, 23.4%
- Dedicated hardworking staff/volunteers, 17.5 %
- Public support, 12.6%
- Negative comments, 3.8%
- Monitoring of charitable organisations, 3%
- Media/Profile, 3%
- Tax refunds on donations, 0.5%
- Unsure, 17.6%

Transparency and information about destination of funds was the most noted need in the New Zealand charitable sector, nominated by 31% of respondents. Ensuring a high proportion of funds goes to the purpose, and concerns about the type and amount of advertising and collections were common points raised.

Segmentation Analysis

Three general public segments were identified based on demographic, attitudinal and behavioural similarities.

- Supporters, 38% of the population and are clearly more positive towards charities, declaring higher levels of trust and confidence across all measures.
- Mainstreamers, 44% of the population and mirror trust and confidence levels of the total population.
- Sceptics, 18% of the population and are clearly less positive towards charities, declaring lower levels of trust and confidence across all measures.

Drivers of trust and confidence in charities

- Management and Outcomes, included how charities spend their money, ensuring money gets to the end cause, making a positive difference and being well managed.
- Openness, included such statements as 'I feel more confident in charities that are open about how they use their resources'.
- Profile, included the statements 'I trust big charities more than smaller ones' and 'I trust charities with well known supporters and patrons'.
- Doubt included negative statements like 'I know very little about how charities are run' and 'Charities use more dubious fundraising techniques these days'.

There was also an indication of the amount of money donated to charities and the amount of volunteer or unpaid work undertaken.

Amount donated to charity in last 12 months

- Over \$250, 25%
- \$101 - \$250, 16%
- \$51 - \$100, 19%
- \$21 - \$50, 20%
- Up to and including \$20, 14%
- Nothing, 5%
- Unsure, 2%

Health and medical were the most common type of organisations that respondents noted donating to in the past 12 months, at a majority of 54%.

Actively involved in organisations

- Not actively involved with any organisation, 56%
- Volunteering or doing unpaid work, 33%
- Committee member, 17.1%
- Paid employee, 9.3%
- Trustee or board member, 9.3%
- Other, 1.2%

The survey can be found on the Charities Commission website: www.charities.govt.nz

