



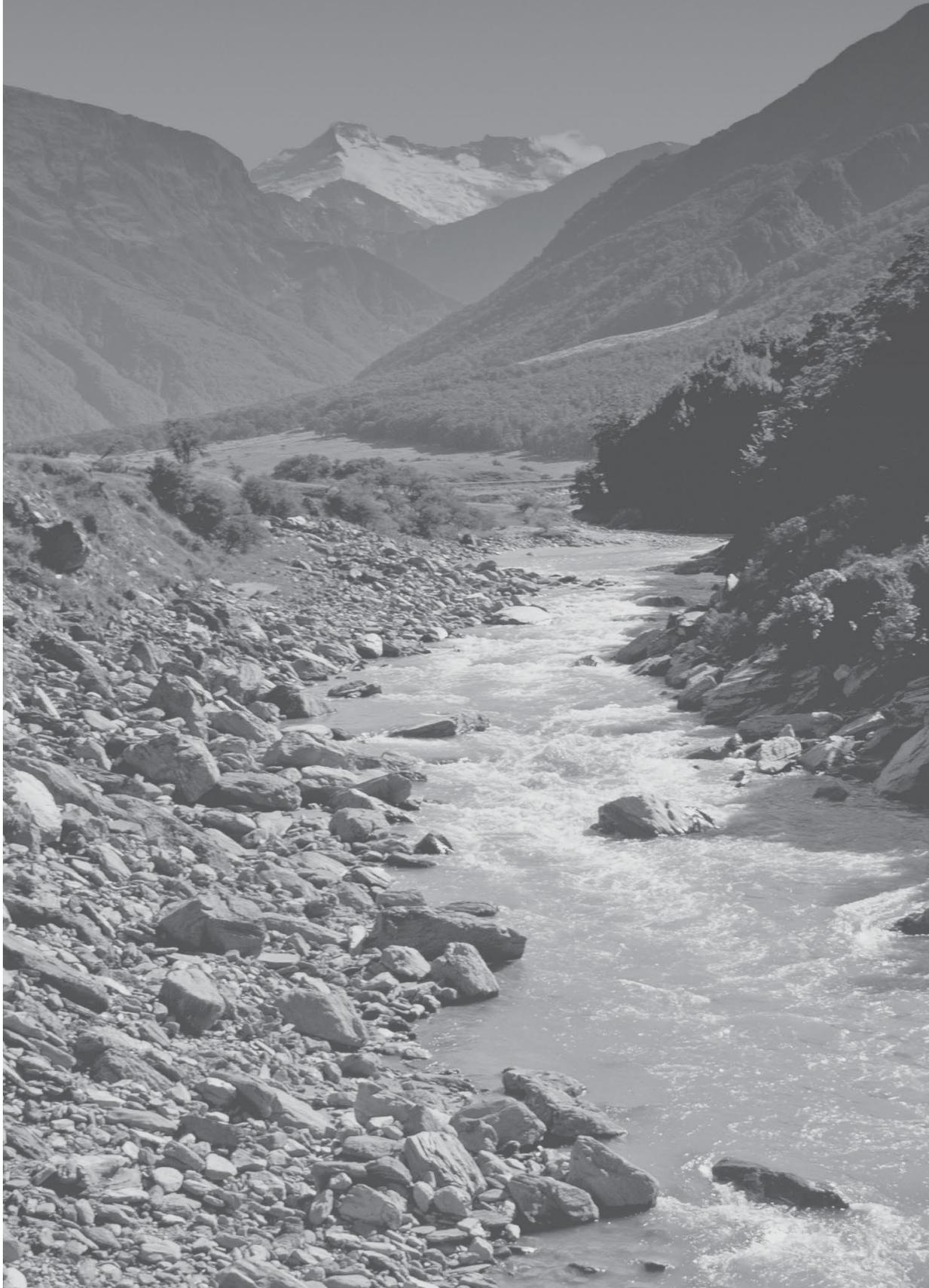
JR McKenzie
Trust



CENTRE
for SOCIAL
IMPACT

The Philanthropic Landscape:

A Review of Trends and Contemporary Practices



Foreword

Tēnā koutou katoa.

Neither Sir John nor Sir Roy McKenzie feared change. In fact, the evidence suggests that they were committed to pushing boundaries, exploring new paths and embracing different approaches. They were trailblazers in business and philanthropy and it's from them both, that we at the J R McKenzie Trust take example.

To have the courage required to welcome change and forge new paths, it's vital that an organisation understands the environment in which it operates. That means gathering information on key trends and practices: you need to know where you've come from, in order to inform where you go next.

The Trust has commissioned this 'Philanthropic Landscape' review in order to gain greater knowledge and insight into the philanthropic landscape in Aotearoa New Zealand and worldwide. It will support us in our regular ten-year strategy review, preparing us for its commencement in 2020. We want to ensure that our mahi remains valid and that we channel the Trust's resources in the right direction for maximum impact.

This review has a three-pronged focus where philanthropy is concerned: identifying emerging concepts, practices that are relevant to Aotearoa's bi-cultural perspective, and practices that are relevant to the J R McKenzie Trust particularly. It's anticipated that the insights offered by this review will support self-contemplation and inspire fresh thinking.

There are various approaches that philanthropy is taking to achieve impact and some interesting themes have emerged across all the different dimensions of philanthropic practice. From a focus on equity, to eliminating the power imbalance, to systems change, this review is rich in information and evidence. We encourage you to read it and reflect on how it might help your organisation to deliver the best outcomes for the communities it serves.

Here at the Trust, we're looking forward to seeing where we get to, but be assured that we plan to aim high and continuously strive for excellence in all we do. Commitment, adaptability and resilience will support us as we journey towards our goals.

"Whāia te iti kahurangi ki te tūohu koe me he maunga teitei: Seek the treasure you value most dearly: if you bow your head, let it be to a lofty mountain."

Nga mihi nui ki a koutou katoa



A handwritten signature in blue ink that reads "Robyn J. Scott".

Robyn Scott
Executive Director
J R McKenzie Trust



A handwritten signature in blue ink that reads "Manaia King".

Manaia King
Chair
J R McKenzie Trust



Executive Summary

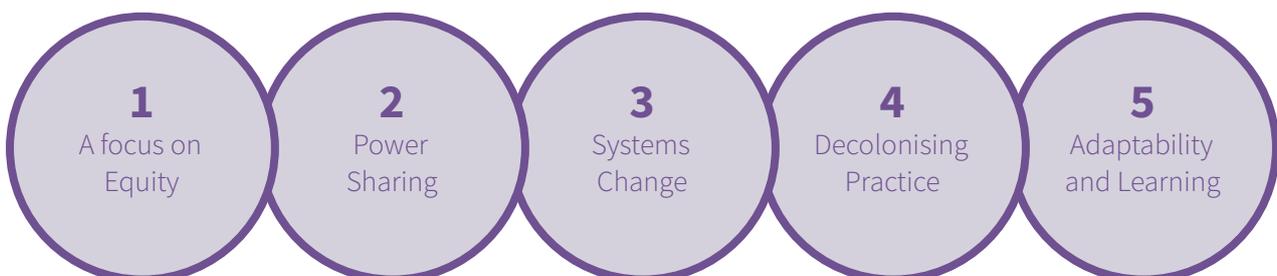
This review has been developed to collate key trends and contemporary practices from philanthropic literature – with a focus on identifying emerging ideas, practices relevant to New Zealand’s bi-cultural context, and practices relevant to the J R McKenzie Trust’s size and identity as both a family foundation and innovative philanthropic leader. The review offers insights that are intended to support self-reflection and new-thinking as the J R McKenzie Trust engages in a journey of organisational review and planning.

Philanthropic practices are as diverse as the donors and institutions behind them. Despite this diversity, what is increasingly common is a move from traditional forms of charity, towards a growing prioritisation of impact and a desire to shift the underlying conditions that are holding a problem in place (Kania, Cramer & Senge, 2018). The philanthropic organisations of today “don’t [just] want to fund homeless shelters and food pantries; they want to end homelessness and hunger” (Wolf-Ditkoff & Grindle, 2017).

The approaches that philanthropy is taking to achieve impact are explored in this review, as they relate to the following dimensions of philanthropy:

- The practices that philanthropic organisations are employing to determine their strategies and, in turn, their operational structures.
- The types of impact being sought – with a focus on practices aspiring to achieve transformational change.
- The grantmaking approaches being used by philanthropy to deliver on their strategies and aspirations for impact.
- The practices required of philanthropic organisations – particularly those working in bi-cultural contexts – to decolonise their practices and more effectively enable the wellbeing of Indigenous communities.
- Key practice considerations for philanthropy’s role and impact potential when working alongside government.
- The practices that support philanthropic organisations to track and understand their impact.

A one-page summary of these practices can be found at the end of this report. Across all of the dimensions of practice, there are key themes that are clearly emerging:



1

A focus on Equity

Organisations are increasingly shaping their investment and non-funding practices around equity. This includes:

- Ensuring that investments are addressing – and not worsening – key indicators of disparity.
- Prioritising populations or groups on the basis of addressing inequalities.
- Seeking to increase economic participation and improve income equity as key drivers of wellbeing.
- Empowering marginalised communities to lead change.
- Ensuring their own organisations are diverse and inclusive.

2

Power Sharing

Understanding where power lies and how power is used is a growing concern in philanthropy. Funders are increasingly recognising the power they hold – both in terms of resources and in terms of their institutional voice and power to influence.

Finding ways to exert this power in ways that influence broader changes and help shift power to communities, are key practice considerations. Funders are also increasingly thinking about how they can:

- Activate the collective power of their philanthropic peers through collaboration.
- Empower communities – through investment, capacity building, advocacy and by valuing Indigenous practices.
- Share power with communities – particularly Indigenous and marginalised communities – through new models of leadership, governance, decision-making and grantmaking.

3

Systems Change

Philanthropic organisations are increasingly investing with a view to achieving systems change i.e. shifting the underlying conditions that hold a problem in place. The intention is to ‘turn off the tap’ and address issues at their source. When engaging in systems change philanthropy, funders are investing and acting to have an impact on key levers of change that include:

- Government and institutional policies.
- The practices of ‘actors’ (people, organisations, networks) with the system.
- The distribution of resources.
- The distribution of power.
- Relationships and connections across the system.
- ‘Mental models’ or deeply held ways of working.

As a key part of the system, there is onus on funders to work collaboratively with others, whilst also working on their own internal practices – such as the opportunities to share their power more effectively.

“Complex problems such as mass incarceration, educational disparities, and environmental degradation remain intractable due to myriad constraints that surround any specific program a foundation might fund. Constraints include government policies, societal norms and goals, market forces, incentives, power imbalances, knowledge gaps, embedded social narratives, and many more. These surrounding conditions are the “water” that many foundation leaders are exploring more deeply.”
(Kania, Kramer & Senge, 2018, p.2)



4

Decolonising Practice

In New Zealand, there is growing recognition of the importance of addressing colonial practices and their impact on the intergenerational wellbeing of Māori. Philanthropy is increasingly prioritising investment in outcomes for Māori in issue areas where there is evidence of Māori over-representation in indicators of inequality. Importantly, philanthropy is also beginning to more deeply understand opportunities to decolonise its own institutions and practices. This includes:

- Building relationships and mandate to work with Indigenous communities.
- Growing the cultural competency of boards and staff.
- Redesigning funding policies and processes so that they work more effectively for Indigenous communities.
- Practicing more adaptative grantmaking that better responds to Indigenous ways of working.
- Valuing Indigenous knowledge, practices and ways of knowing (evaluation).
- Sharing decision-making power with Indigenous communities in ways that enable sovereignty and self-determination.

“The humility, grace and insight that Indigenous-philanthropic relationships can foster may also allow us, finally, to collaborate with shared purpose, sufficient breadth and enduring impact.” (Acre & Stauch, 2016)

5

Adaptability and Learning

Philanthropic organisations, through their focus on equity and systems change, are working in environments of increasing diversity and complexity. To respond effectively within this complexity, funders need a range of tools in their toolkit – and to be able to use these tools adaptively as the environment changes or opportunities arise.

‘Adaptive philanthropy’ requires funders to:

- To be responsive and make rapid decisions when needed.
- Invest in ways that are fit-for-purpose to the issue, opportunity or community need – whether that be seed funding or multi-year investments.
- Work relationally with ngā kaikōkiri (grantees), trust that they know what they need to deliver on their mission and be willing to provide unrestricted funding – including investment in core costs.
- Prioritise learning at every opportunity, to support adaptation and increased long-term impact.

Contemporary philanthropic organisations are encouraged to consider how these important ideas and practices can be woven into their work through their strategies, as well as their grantmaking models, relationships with ngā kaikōkiri, governance practices, evaluation approaches and other non-funding roles.

Based on the findings of this literature review, key questions that funders in New Zealand might ask of themselves include:

- **How can our strategy be designed to prioritise investment in reducing inequalities?**
- **Do we understand the issues that we are trying to address? Do we understand the conditions that are holding the problems in place? And, how can we make space for those with lived experience of these issues to shape our understanding and our actions?**
- **Does our organisation reflect the communities that we serve? How can we ensure that we strengthen diversity and inclusion in our leadership and decision-making roles?**
- **In what ways could our practices be unconsciously perpetuating inequity? How could we empower and share power with communities more effectively?**
- **How is our philanthropic practice experienced in the context of Te Ao Māori? How can we build relationships, enable, share learning and share power with Māori communities more effectively?**
- **Aside from funding, what roles could our organisation play in influencing systems change? In what ways can we leverage our institutional voice? Who else in the system should we be collaborating with?**
- **Do we have the right grantmaking tools at our disposal for working in complexity? How might we build greater flexibility and adaptability into our funding framework and programmes?**
- **What opportunities are there to more systematically embed learning into our practice? How can we ensure that we recognise and value Māori ways of knowing and understanding impact – both the impact of ngā kaikōkiri, and our own impact?**

Answering these questions is a journey of continuous development and learning. It requires philanthropic organisations to step outside of their comfort zone, engage with community and, in some cases, confront uncomfortable truths about their organisational practices. It also requires philanthropic organisations to be ready to embrace ‘failure’, to anticipate the need for ‘course corrections’ and to prioritise learning in order to continue transforming themselves and their impact.



Introduction

The J R McKenzie Trust is engaged in a process of research, self-reflection and learning as part of its journey towards developing a new organisational strategic plan in 2020. This process has involved the collation of research and other information that is designed to support the Trust's board and staff to consider the Trust's impact to date, reflect on the unique attributes and potential of the Trust, and begin to recognise opportunities for the Trust to continue evolving its strategy and practice in order to sustain and deepen its impact in the future.

Work completed as part of this process to date includes:

- An analysis of the outcomes of the Trust's current funding approaches (outcomes harvest).
- A ngā kaikōkiri (grantee) survey providing insights from ngā kaikōkiri (grantees) and their experience of engaging with the Trust.
- A research paper on philanthropic engagement with advocacy as a key practice for social impact.

This literature review has been designed as an accompanying 'think piece' that shares insights from local and international philanthropy about contemporary and emerging philanthropic practices. The review draws evidence from journal articles, research and think pieces highlighting new and effective practice, taken from well-recognised sources of philanthropic thought leadership, including Alliance Magazine, the Centre for Effective Philanthropy, The Foundation Review, FSG Consulting, the Putnam Consulting Group, Rockefeller Philanthropy Advisors and the Stanford Social Innovation Review.

To support J R McKenzie with its strategic development process, this review has prioritised, where possible, literature that is:

- Current (2018 onwards).
- Relevant to the J R McKenzie Trust's scale and size.
- Relevant to the nature, structure and approach of family foundations.
- Relevant to New Zealand's bi-cultural context.
- Aligns with the J R McKenzie Trust's identity as an innovative funder with a social equity lens.

Five contemporary practices: Designing strategy (and structure)

The first section of this review explores the ways in which philanthropic organisations are designing strategy, as well as looking at how implementing this strategy is influencing their organisational structure. Five key practices are explored:



Using values as a navigational tool

Developing a set of organisational values is an important process for philanthropic organisations. The process of exploring and developing values can help organisations to more clearly understand the drivers behind their mission, their core beliefs and attitudes and their ‘style’ or ways of working and behaving alongside others.

For family foundations, expressing clear values can be particularly important to ensure that foundation staff can interpret and deliver on the intentions behind the family’s vision for establishing the organisation. As both society and philanthropic practices change over time, the organisational values can be an important thread that enables the organisation to evolve its approach whilst staying true to its overall culture of giving and to its donors’ foundational intent.

“The William and Flora Hewlett Foundation honors the aspirations of its founders by using the resources they placed in our trust in ways that remain true to their philanthropic ethos and values. Because the world in which we work changes continuously, honoring the Hewletts’ hopes and ambitions requires us to change too. Adapting to evolving circumstances while preserving core principles can be challenging. To help meet the challenge, we have articulated a set of foundational principles to guide our activities, serve as a reference in ongoing operations, and help ensure that our actions are consistent with our aspirations.” (William and Flora Hewlett Foundation, 2016)

Agreeing a set of foundational values can be vital in supporting donors, trustees and staff to hold a consistent understanding of who the organisation is at its core and how this might influence the way in which the organisation determines strategy – from what issues to focus on, to how it will partner with others to deliver change. Values are often described in contemporary practice as a ‘theory of philanthropy’ or ‘theory of the foundation’ (Patton, Foote & Radner, 2015; Berman, Major & Franklin, 2017).

“A theory of philanthropy articulates how and why a foundation will use its resources to achieve its mission and vision. The theory-of-philanthropy approach is designed to help foundations align their strategies, governance, operating and accountability procedures, and grantmaking profile and policies with their resources and mission.” (Patton et al., 2015, p.7)

Values, expressed in a theory of philanthropy, play a navigational role, enabling philanthropic organisations to:

- Give meaning to their strategy and approach.
- Be transparent to stakeholders about what is important to them.
- Engage staff in the organisation’s culture and vision; and ensure that the organisation’s actions are congruent with this culture and vision.
- Signal the values-alignment that they will seek to achieve when working with prospective partners.

Using data to shape strategy

Philanthropic organisations are becoming more engaged in using data to determine strategy. This most commonly involves analysis of population data relevant to the communities that a foundation serves, to understand the characteristics of that community and its key indicators of need, as well as future trends that might need to be factored into strategy.

Literature encourages funders to engage with data in meaningful ways. This includes disaggregating demographic datasets to understand how outcomes and experiences may vary between population groups, i.e. identifying where population groups may be over-represented in indicators of need.

Ongoing tracking of population can also support philanthropic organisations to understand how communities are changing over time, and therefore how the funder might adapt strategy in response to these changes (Putnam-Walkerly & Russell, 2016; Centre for Social Impact [CSI], 2018b; Bixler, Zappone, Rui Li & Atshan, 2018).

Embedding lived experience into strategy (and structure)

Philanthropic funders are increasingly designing strategies and investment approaches that respond to the needs, aspirations and lived experiences of communities, in order to increase their relevance and deliver more sustainable impact. This marks a move away from the more ‘top-down’ strategy-setting of ‘strategic’ philanthropy, which has been criticised in philanthropic literature as being too distant from the communities that the strategies are intending to serve. For some family foundations, this can mean being less donor-centric, and finding ways to be more rooted in community (Buchanan, 2019).

By engaging directly with communities, funders can gain a much deeper understanding of how

indicators of need are actually experienced by community, and what the community’s aspirations are for change. These insights about need, lived experience and community aspirations can help identify where, when and how a funder might best invest to achieve impact.

“Listen constantly to the voices in your community, and especially to those whom you most desire to help. Let their experience and ideas inform and guide your decision-making and shape your investment.” (Putnam-Walkerly, 2016, p.2)

In contemporary philanthropic practice, there is an emerging spectrum of community engagement – including, on one end, consultation; through to more participatory co-design, and the integration of people with lived experience into advisory or decision-making and leadership roles (Putnam-Walkerly & Russell, 2016; Nwulu, 2018).

Diagram: Continuum of community influence over philanthropic strategy setting



- Consultation can provide funders with key insights about community needs and aspirations, which can be useful when determining strategy.
- Co-design processes are typically more participatory and allow funders to integrate the ideas and experiences of communities more directly into the design of new strategies or funding programmes.
- Some philanthropic organisations are moving to establish advisory roles or groups comprised of ngā kaikōkiri, sector leaders, issue experts and/or other key community representatives. Such groups are typically more integrated into the funder’s activities, providing vital ongoing intelligence about e.g., the needs of communities, the experiences of ngā kaikōkiri or emerging new issues/opportunities. This helps to inform boards as they consider the strategies and role(s) that they would like to play.
- Increasingly, philanthropic organisations are encouraged to consider how “space is given for the views and leadership of those with lived experience in the cause areas foundations fund. Meaningful engagement needs to go beyond outreach, rather it needs to be embedded as an integral part of any foundation’s core operation” (Nwulu, 2018). Integrating lived experience into leadership and decision-making spaces can have a significant impact on a funder’s responsiveness to community. It requires organisations to consider how their practice supports diversity and inclusion.



In general, good practice principles for engaging with the needs, aspirations and lived experiences of communities include:

- Adopting mechanisms that enable regular listening to, and privileging of, the voices of marginalised communities and people with lived experiences of the issues that a funder is seeking to address.
- Providing opportunities for people with lived experience to inform, influence and, where possible, engage in leadership, decision-making and governance roles.
- Prioritising engagement approaches that are positive and participatory experiences for participants, and that recognise and value their time and insights.
- Seeking to ensure that community engagement is sustained and integrated, to avoid being tokenistic.
- Maintaining a community presence by creating community-facing operational roles that facilitate ongoing dialogue and relationship-building with communities.
- Nurturing collaborative relationships/partnerships with key community stakeholders that can inform strategic decision-making.
- Training philanthropic staff and boards and growing internal capability for effective engagement with communities – including a focus on strengthening cultural competence and responsiveness to Indigenous and diverse communities (Putnam-Walkerly & Russell, 2016; CSI, 2018a; Cyr, 2017; Nwulu, 2018; Foundation North, n.d.; TSB Community Trust, n.d.).

Structuring teams around strategy

Philanthropic strategy is shifting from being transactional and volume-based, to being more relational and impact-based. As this shift in grantmaking practice occurs, it has implications for the skills that a funder requires, and the way that it structures its roles to deliver on strategy.

This might include the need for specialist roles that are each focused on specific issue areas, geographic areas or ways of working and funding, or more community-facing roles/functions that support funders to be more embedded in community and work more collaboratively with others in a sector or ‘system’ of interest. As funders diversify their roles and skills, it is also important to ensure connectivity and, critically, reciprocal learning between staff and between different funding programmes (Stevenson, Bockstette, Seneviratne, Cain & Foster, 2018).

Funders may also consider how they can extend their internal capacity (and capability) to deliver strategy, by engaging subject experts and community stakeholders in advisory and decision-making functions and integrating these into operational practice.

“Our goal is a porous structure where staff members are advised, supported, and challenged by others, where knowledge is shared, assumptions are reconsidered, and decision-making and problem-solving are improved by the diversity of experience and perspective.”
(Stevenson et al., 2018, p.29)

Embracing course corrections

As philanthropic strategy becomes more focused on equity, systems-change, and intergenerational impact, not only does grantmaking practice need to be adaptive and nimble, but so too must overall strategy. Funders need to be willing to adjust their strategies as the environment around them changes and as they learn more about the intractable problems that they are seeking to shift.

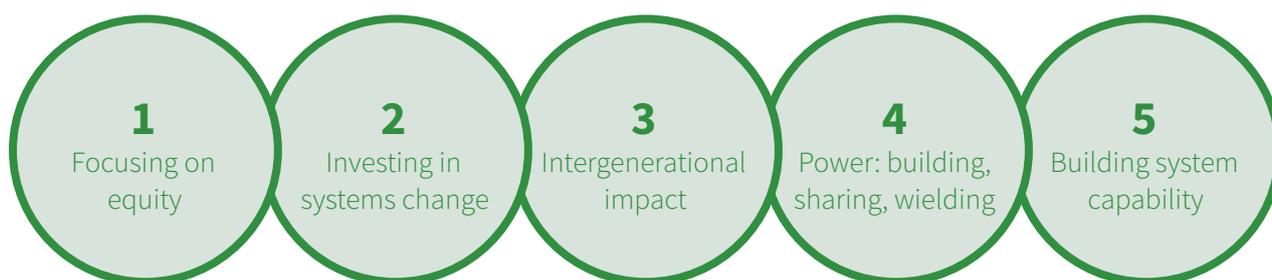
In this way, strategies are being shaped much more as living roadmaps than as a fixed-plans. Whilst the overall goal may be relatively fixed – for example, recognising the need for sustained investment to shift entrenched problems – the strategic approaches to deliver on this goal will shift and be informed by regular reviews and ongoing learning (Wolf-Ditkoff & Grindle, 2017).



Five contemporary practices:

Achieving transformative impact

Philanthropic organisations are diverse in structure, scale and mission. Approaches to ‘making a difference’ are increasingly diverse – from traditional charity through to more wide-reaching ambitions for social change. This section explores five emerging approaches that are focused on delivering impact that is transformational in terms of scale and sustainability:



Focusing on equity

There is growing evidence that focusing on addressing disparities by improving the outcomes of communities with the highest needs can support positive outcomes for everyone in society (Wilkinson & Pickett, 2009; CSI, 2018c; Business and Economic Research Limited, 2017). In response, philanthropic funders are increasingly thinking about the role that they can play in addressing disparities and supporting equity. Such approaches can involve:

- Prioritising specific population groups where evidence shows that these groups disproportionately experience inequalities; and where this disparity is entrenched i.e. experienced over successive generations.
- Prioritising specific regions or places where communities are seen to be ‘falling behind’ in comparison to national averages.
- Investing in specific issues that can be identified through evidence as being key drivers of inequality – including income, economic participation and education (CSI, 2018a; Foundation North, 2018a; Putnam-Walkerly & Russell, 2016).

“We are taking a systems-thinking approach to help us understand how [we can] reduce poverty and inequality, and to support fairer access to opportunities for children and their families/whānau... We are deepening our understanding of what does and doesn’t work when seeking to create fairer futures, and identifying innovative ways of working that could make a difference.” (Todd Foundation, n.d.)

To address disparities, funders are increasingly designing investment approaches that:

- Prioritise concerted, long-term investment into identified communities of highest needs.
- Invest in understanding and addressing the underlying root causes.
- Target investment into the re-design of systems that are seen to perpetuate intergenerational cycles of need (CSI, 2018a; Justice Funders, n.d.).

Focusing on equity often requires funders to make difficult decisions about the allocation of their resources. This may include divesting in established issues, sectors or organisations that a funder has had a long relationship with, in order to focus more sharply on addressing the drivers of inequity in the communities that they serve.

Systems change

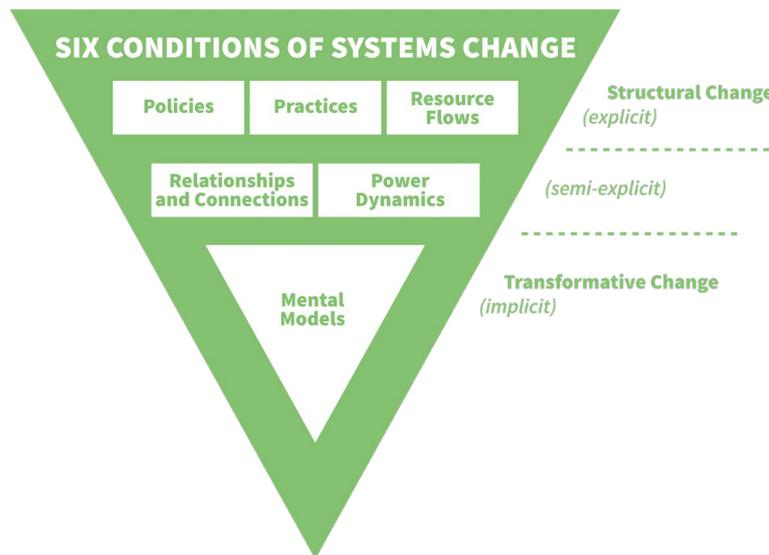
Many funders have begun to move away from a transactional, reactive or grant-by-grant approach, towards a clearer understanding of the complexity of today's challenges and the need to invest in ways that respond to this complexity (Rockefeller Philanthropy Advisors [RPA], 2018; CSI, 2018a).

Addressing complex issues requires transformational change of the underlying structures, models of operating and paradigms – i.e. 'systems change'. Investing in systems change is about “shifting the conditions that hold a problem in place” (Kania, Cramer & Senge, 2018, p.3). These conditions, when addressed, can be key levers of system change. They include:

- Government and institutional policies that guide the actions of actors (people, organisations, networks) within a system.
- Widely held practices of the people, organisations, institutions and networks within a system.
- How resources – including money, people, assets, technologies and knowledge – are allocated and distributed across the system.
- Relationships and connections between actors in the system.
- Power dynamics i.e. how influencing and decision-making powers are distributed and shared across the system.
- Mental models or deeply held ways of thinking and working (Kania et al., 2018; RPA, 2018).



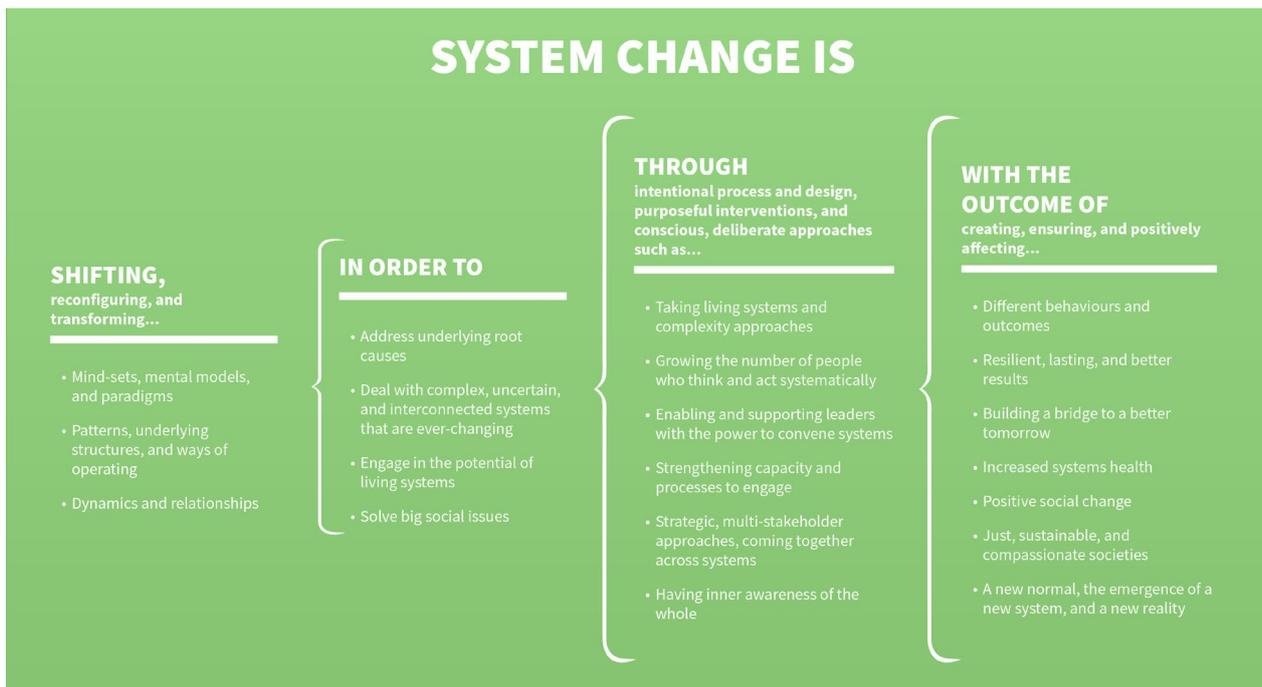
Diagram: Conditions of systems change (Kania et al., 2018, p.4)



On a practical level for philanthropic funders, engaging with these key levers for systems change can include:

- Exploring how these levers are operating within their own organisations – for example, rethinking the way that their own resources are distributed, their power is shared, or how their internal mental models could be shifted to improve practice.
- Investing in ngā kaikōkiri in ways that directly enable them to influence these levers of system change.
- Building the capacity and capability of different stakeholders within the system – including individuals, whānau, organisations, leaders, networks and sectors – to engage with these levers of systems change.
- Partnering with funders and other stakeholders that operate across different parts of the system, to directly strengthen relationships and connections within the system.
- Convening, brokering collaboration and/or investing in the ‘architecture’ or mechanisms for collaboration.
- Shifting mental models within the philanthropic sector, for example, inherent biases or mono-cultural approaches that perpetuate inequity (RPA, 2018; Kaplan, 2018; Putnam-Walkerly & Russell, 2016; Kania et al, 2018).

Diagram: Systems change (RPA, 2018, p.6)



Intergenerational impact through a long-term view

Funders are developing strategies with increasingly long-term visions for change. This reflects evidence that sustained investment is needed to achieve systems change and to shift the dial on entrenched disparities. For example, Foundation North’s recently developed 15-year strategy includes a priority outcome to address the intergenerational disadvantage that is disproportionately experienced by Māori and Pacific communities in South Auckland and Northland (Foundation North, 2018a).

In the New Zealand context, philanthropic funders that are established in perpetuity – including many family foundations – often adopt an intergenerational view. This intergenerational viewpoint is a shared space for philanthropy to engage with hapū and iwi, who often have very long-term – even 100-year – strategic plans that consider impact in relation to the wellbeing of future generations (CSI 2018a; Slade, M., 2012).

Whilst strategies are increasingly long-term in their vision or impact, many funders are simultaneously increasingly nimble in what and how they fund to achieve this vision.

Building, sharing and wielding power

Building power

Philanthropic organisations can contribute to equity and drive systemic change by investing time and resources into activities that build the power of marginalised communities. Building power can be achieved through enabling marginalised communities to participate in and lead civic engagement, advocacy, community organising and community-led action.



Funders are encouraged to invest in platforms that empower communities to be agents of change and to develop their own solutions; and to be transparent and explicit about who they are supporting to build power, and to what ends (National Committee for Responsive Philanthropy [NCRP], 2018; Ebrahimi, 2019).

Sharing power

In contemporary philanthropy, more and more funders are asking difficult questions of themselves in relation to their privilege and are exploring how they can share power in ways that advance equity and increase impact. Sharing power moves funders beyond transactional, top-down approaches to giving, towards ‘trust-based philanthropy’ that seeks to minimise the power imbalances between funders and ngā kaikōkiri, by:

- Developing funding processes that are more relational and transparent.
- Prioritising unrestricted funding that builds trust and enables ngā kaikōkiri to hold greater autonomy over their resources.
- Offering support beyond funding.
- Providing spaces for reciprocal learning, where the insights of both parties are shared and valued (The Whitman Institute, n.d.).

Dialogue is growing across philanthropic communities to explore ways that funders can share – or even cede – decision-making power. This includes imagining new models for sharing control of resources, ‘democratising’ grantmaking and valuing the knowledge and human capital that exists within communities (Enright, K, 2018; Justice Funders, n.d./a; NCRP, 2018)

“Grantmakers who consciously share power with and leverage privilege for non-profits and communities are learning that a collaborative approach is pivotal to achieving social change and a more equitable society”. (Enright, K., 2018)

For family foundations, sharing power can mean inviting non-family members to engage in leadership and decision-making roles in order to fill gaps in expertise; whilst also enabling diversity of thought that helps in “grounding board decision-making in real life experience” (Cummings & Alpert, 2018).

Wielding power

Philanthropic funders are increasingly being encouraged to use their full organisational “purpose and potential” alongside their financial resources (CSI, 2018a, p3). This means wielding both their financial and non-financial power, and “exercising public leadership beyond grantmaking to create equitable, catalytic change” (NCRP, 2018).

“Many funders rely on grants alone to achieve impact, missing the opportunity to leverage the other tools at their disposal to advance their mission, values and equity goals.” (NCRP, 2018)

Key to this is using the organisation’s “institutional voice” – its position, reputation and circles of influence – to highlight issues and opportunities that they have identified as being important levers for change (Belk, 2018).

Philanthropic organisations can use their power and influence by:

- Being transparent about the financial investments they are making into key issues, and why.
- Leveraging their reputation to spotlight and ‘champion’ critical issues.
- Sharing information about the work, reach and impact of ngā kaikōkiri to help further their missions.
- Supporting ngā kaikōkiri to transform local efforts into scalable programmes and policy change opportunities.
- Commissioning, funding or sharing research, events and other mechanisms for capturing the lived experience of communities, helping to amplify the voices of communities that otherwise have limited platforms to share their experiences.
- Convening conversations that help drive change agendas, whilst also actively participating at other convening tables.
- Sharing insights with philanthropic peers to encourage shifts in practice that direct philanthropic efforts and dollars to issues that the funder has identified as being critical.
- Sharing insights with government where there is potential to influence policy based on evidence generated by the funder and ngā kaikōkiri (Belk, 2018; NCRP, 2018; Burton & Barnes, 2017).

Philanthropic organisations can further ‘wield’ power by using their financial weight to achieve influence and impact through mission-aligned management and investment of endowment funds.

“Simply divesting from harmful industries isn’t enough. We must proactively invest in economic enterprises that build local, regenerative and democratic economies while ensuring that our investments are providing more value than they extract.” (Justice Funders, n.d./a)

Building capability

Providing ngā kaikōkiri with assistance to develop their capacity and capability is a growing practice for philanthropic funders. This assistance can take the form of direct financial support over and above a grant, with which ngā kaikōkiri can purchase their own supports; or arrangements where the funder directly resources an intermediary capacity development provider to offer one-to-one support to ngā kaikōkiri and/or to offer group-based support across cohorts of ngā kaikōkiri or across funding programmes.



Much capacity support is focused on providing key skills that enable an organisation to function well, such as

- Strategic planning.
- Leadership development.
- Effective governance.
- Operational systems and processes.
- Evaluation and data-driven decision-making (Pond, 2015; Raynor, Cardona, Knowlton, Mittenthal, Simpson, 2014).

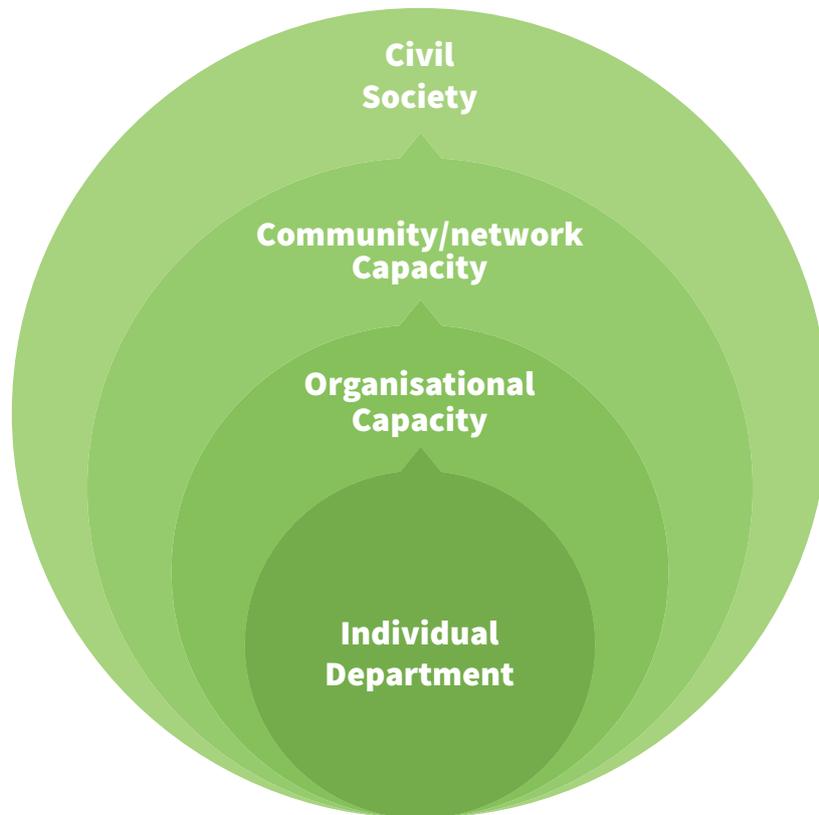
Increasingly, funders are exploring non-financial ways that they can directly help to strengthen the capacity of ngā kaikōkiri. This includes the organisation's staff working with ngā kaikōkiri to:

- Strengthen funding literacy and, subsequently, the ability of ngā kaikōkiri to successfully access other revenue streams including government funding.
- Broker relationships between ngā kaikōkiri and other stakeholders that can help to strengthen their capability and impact.
- Broker relationships between ngā kaikōkiri and government agencies or officials, helping ngā kaikōkiri to advocate about their work and/or advocate on behalf of the communities they are serving.

Over time, capacity development efforts have evolved in their focus – from a focus on the capacity of individuals, to the capacity of organisations, and more recently, to the capacity of whole systems. A funder's potential to achieve transformational impact is increased by investing in capacity development within and across systems. This deliberately strengthens the quality, effectiveness and capacity for impact of multiple actors in the system, so that cumulatively the whole system's potential for impact is transformed. This systems approach to capacity development, or 'capacity building 3.0', focuses on:

- **Capacity to understand:** Building the capacity of organisations within a system to understand the system – including their understanding of communities' experience of the system and where power sits within the system – as a basis from which to build towards change.
- **Capacity to respond:** Building the capacity of organisations to respond and adapt to change.
- **Capacity to structure:** Building the capacity of organisations to build networks, collaborate and share leadership/power in ways that influence positive changes within the system.
- **Capacity to influence:** Enabling organisations to share and leverage knowledge, skills and resources in ongoing ways (Raynor et al., 2014).

Diagram: System capacity development – capacity building 3.0
(Raynor et al., 2014, p9 and p11)



A Nested Place in the Ecosystem

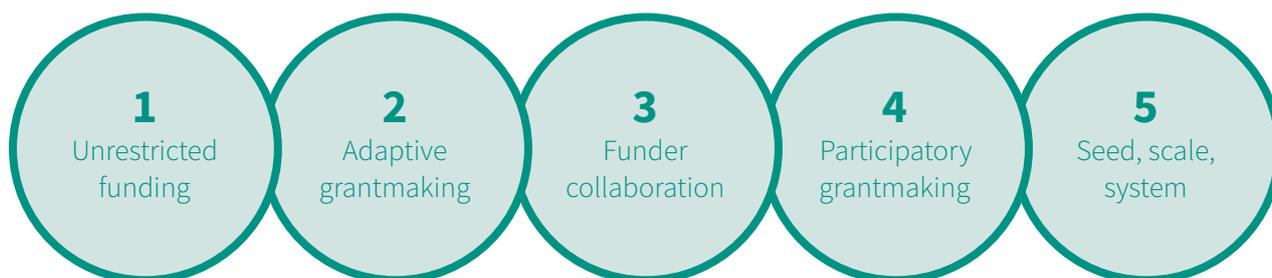
KEY AREAS FOR CAPACITY BUILDING 3.0

How an organisation understands its ecosystem	How an organisation responds to its ecosystem	How an organisation structures itself in response to its ecosystem
<ul style="list-style-type: none"> • R&D Evaluation and Learning • Power Analysis • Network Analysis • Organisational Lifecycle • Issue Lifecycle 	<ul style="list-style-type: none"> • Change management • Advocacy • Inter-Reliant Funder Capacity and Non-Grant Funder Activities • Creating Shared Value • Collaborative Skills • Defined Leadership Role 	<ul style="list-style-type: none"> • Coalition and Network Functioning • Collective Governance/ Shared Leadership • Capacity to Function as Movement Actors



Five contemporary practices: Grantmaking approaches

As philanthropic funders seek more transformative impact, the ways in which they distribute funding are evolving and diversifying. This section explores five contemporary funding models or approaches that are being employed by grantmakers:



Investing in outcomes – unrestricted funding

Both contemporary literature and funder-led research recommends funding approaches that “invest in the ‘what’ and let [the] organisations you fund determine the ‘how’” (Esmée Fairbairn Foundation, 2019, p.15). This means focusing more on the reason for funding *ngā kaikōkiri* – or the outcomes desired – and less on how funding is actually spent by *ngā kaikōkiri* to achieve these outcomes.

Often, this approach means providing unrestricted funding and/or specifically investing in core funding, i.e. resourcing the central running costs that an organisation requires to deliver on its core mission. Core funding can be just as integral as programmatic funding to an organisation’s ability to achieve their mission and intended outcomes – and it is these outcomes that funders are ultimately investing in.

Investing in core/general operating support can help non-profit organisations to get out of ‘starvation mode’ caused by underfunding of the real or full costs of delivering their programmes and services. Unrestricted funding can “release organisations with a track record from the treadmill of fundraising and reporting” (RPA, 2018, p.3), and allows them to focus on delivering against their mission and increasing their impact (Esmée Fairbairn Foundation, 2019; Bretting, Jordan & Walker, 2018; Eckhart-Queenan, Etzel, Prasad, 2016).

“Prior to 2017, we offered a mix of project-specific and general operating support grants. While it seemed intuitive that project-specific support gave us more control over how funds were being spent and allowed us to tell a better “story” about the impact of the grant, we actually found the opposite to be true. Project-specific support only provided a narrow lens into the organizations we were supporting. We would create a dance for ourselves and our grantees [ngā kaikōkiri] where we each pretended that the organization knew exactly how the funds would be spent in the following year of the grant. It was like we were on a tightrope together...” (Bretting et al., 2018)

Adaptive grantmaking

Many traditional forms of philanthropy have been focused on models of funding that involve an open call for applications, grant decisions based on applications received, followed by a 12-month agreement and finally the provision of a brief accountability report focused on the use of funds. Increasingly, philanthropy is moving away from this model of funding, with funders seeking to distribute funds more adaptively, recognising that “complex problems require adaptation because they involve too many unknowns and interrelated factors to reduce to strict plans or rules” (Kaplan, 2018, p.12).

‘Adaptive philanthropy’ is on the rise, and can be characterised by:

- **Relationships:** Working alongside community stakeholders in ways that are more relational and less transactional, which enables philanthropic funders to identify opportunities to invest as a result of these relationships, rather than as a starting point.
- **Fast decision-making:** Funders are seeking to make more rapid decisions so that community momentum is not stalled but, rather, maintained and accelerated. This is often achieved by:
 - streamlining application and assessment processes;
 - utilising financial policies that allow for greater responsiveness, such as delegated authority or phased grantmaking;
 - building relationships with ngā kaikōkiri to grow knowledge and trust, and speed-up decision-making;
 - decision-making behaviours that are courageous and focused on potential more so than on risk; and,
 - integrated ‘on-the-go’ learning that enables quick decisions and supports changes in direction when appropriate (Putnam-Walkerly, 2018).
- **Focusing on learning over compliance:** Reducing the focus on compliance can help ensure that funders do not “smother new ideas before their potential emerges or is realised” (CSI, 2018a). Instead, funders are increasingly focused on developing learning relationships with ngā kaikōkiri – to learn from ‘failure’ and success, overcome barriers, iterate funding practice and accelerate potential for impact (Impact Funders, n.d./b)
- **Varied funding approaches:** Funders are growing the number of grantmaking tools at their disposal – including, for example, seed funding or multi-year grants. This enables the funder to use the right ‘product’ for the right funding opportunity; and also means ngā kaikōkiri can receive different types of funding over the course of their project as needs dictate. In some cases, funders might simultaneously provide innovation grants whilst simultaneously maintaining ongoing operational funding to ngā kaikōkiri, allowing them to test new ideas without compromising the business-as-usual of their organisations.



Funder collaboration

Funders that have a shared interest in particular issues, sectors, population segments or geographic areas of benefit are increasingly proactive in identifying opportunities to collaborate with and/or co-invest with each other. Where this collaboration is strategic and systems-focused in nature, it can be more impactful than ad-hoc or ‘accidental’ grant-by-grant co-investment.

Strategic impact collaborations between funders require each partner to think and operate in systems-terms and potentially redefine how their resources are shared with each other and with others across that system. This may be supported by developing shared goals and a collective ‘theory of change’ (framework or model for impact).

When done effectively, funder collaboration can:

- Build collective knowledge through joint-working and shared learning.
- Spread risk when trying new things or investing in innovation.
- Build connections with the system, as a key lever to support systems change.
- Enable peer-to-peer influencing, which is shown to be one of the best routes to shaping and proliferating good practice in the philanthropic sector.
- Extend the level of total investment – and therefore the reach, scale and impact – beyond what each funder could achieve individually (RPA, 2018; Kippin & Swinson Reid, 2016; Putman-Walkerly, 2017; CSI, 2018a; Knight, 2018; Leland, 2017).

Diagram: Co-Impact – a new model of collaborative philanthropy (Leland, 2017)



To support effective funder collaboration, partners should each identify distinct roles, create decision-making mechanisms that allow flexibility, use grantmaking structures that have potential to deliver on each partners’ respective and combined priorities, and manage exit-strategies in ways that do not compromise relationships between partners and/or with ngā kaikōkiri (Seldon, 2015).

“Funders are encouraged to understand their role as part of a wider system of investors and explore how and under what conditions the whole system can be activated for maximum impact.” (CSI, 2018a, p.8)

Participatory grantmaking

Participatory grantmaking is a way to actively engage place-based or issue-based communities in decision-making. As a funding practice, participatory grantmaking values the knowledge, lived experience and community intelligence of participants, and uses this as a basis for making more effective funding decisions. Through participatory grantmaking approaches, funders are able to:

- Increase their transparency and accountability to the communities that they serve.
- Rebalance more top-down funding approaches that are often in danger of replicating the same inequitable power dynamics in society that grantmakers are seeking to address.
- Share power with communities.
- Build capability in communities (Love, 2016).

Philanthropic funders note significant benefits of participatory grantmaking, including an improvement in the quality of the decisions that emerge because of the participatory approach and its ability to provide access to a deeper understanding of the issue, community or field.

Furthermore, participatory approaches provide opportunities to better connect with grantee organisations and build relationships that support ongoing impact. Through involvement in participatory grantmaking, community leaders and grassroots community organisations are also able to increase their ‘philanthropic literacy’ and have strengthened capacity to access other resources and build effective relationships with funders (Evans, 2015; Hart, 2015; Love, 2016).

Participatory grantmaking approaches can be challenging to deliver. To support effective participatory practice, funders should:

- Be willing to support communities to take part in the process of participating and consider how to recognise and manage the burden on participations to be part of the process – including their time, any financial outlay, and emotional and intellectual effort.
- Dedicate sufficient time and longevity of commitment to implementing authentic community participation, at scale.
- Be willing and able to operate with the agility and speed needed to follow through on participant decisions and expectations.
- Support relationship building and network development amongst participants.
- Ensure trust is built and conflicts are managed.
- Manage the process to make sure ‘local elites’ – i.e. organisations with high funding literacy – do not ‘capture’ the funding and community development aspects of participatory practice.
- Carefully manage the tension between organisational mission and community direction, that is, balance achieving funder strategic priorities without compromising the authenticity of community decision-making and ensuring that what communities want funded can be followed through with.
- Be explicit with the internal politics that participatory philanthropy can surface within the funder organisation, and facilitate ongoing conversations about power sharing (Gibson, 2018).



Seed, scale, system approaches

Many philanthropic funders are beginning to adopt multi-dimensional grantmaking strategies that employ a range of funding approaches, each designed to achieve different impacts or invest in ways that are fit-for-purpose in a range of unique contexts.

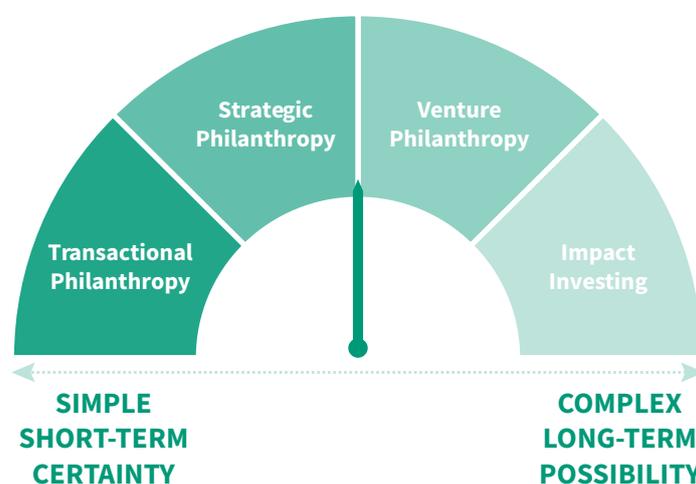
For some trusts and foundations this enables funding to be segmented in ways that balance a desire for funds to be widely accessible to communities, with an ability to also work strategically and in tailored ways suitable to address specific priorities and complex problems. The flexibility that this allows is particularly useful for funders that have a requirement to serve a wide range of communities and sectors, but that also want to work strategically – for example, the New Zealand Community Trusts.

The range of approaches most commonly observed in New Zealand philanthropy include:

- Transactional grantmaking – one-off grants awarded in response to applications received from community.
- Strategic grantmaking – funding programmes designed to deliver a range of targeted outcomes, and where applications are sought and approved based on their alignment with these outcomes.
- Venture philanthropy – investment in innovative new solutions, usually focused on systems change, and requiring more adaptive models of grantmaking where relationships and evaluation are key components of the grantmaking approach.
- Impact investing – investment approaches that go beyond grantmaking with the expectation of both social and financial returns, with such approaches requiring new tools and practices of the funder in order to assess both social and financial potential, risk and impact (CSI, n.d.).

In many cases, funders structure their grantmaking approaches in such a way that ngā kaikōkiri can move, over time, from accessing ‘entry-level’ transactional grants through to other models of funding that more readily enable scale or innovation.

Diagram: The grantmaking ‘dial’ (CSI, n.d.)



Within the systems-change funding context in New Zealand, the ‘seed, scale, system’ model of grantmaking has emerged through Foundation North’s G.I.F.T Fund, which is focused on systems change within the Hauraki Gulf to restore the Gulf’s Mauri.

The seed, scale, system approach recognises that, to achieve systems change in such a complex human and environmental landscape, funding needs to simultaneously:

- Enable new ideas and practices that could be viable at large scale.
- Build connection between interventions and actors in the natural and human systems.
- Change behaviours across diverse communities.
- Engage Mātauranga Māori or Indigenous knowledge.
- Leverage other investors and investments in order to achieve sufficient scale (G.I.F.T., n.d.).

‘Seed’ funding enables rapid prototyping of new ideas with ‘radical’ potential through small, nimble grants with a strong emphasis on learning. ‘Scale’ funding aims to grow the reach and impact of these, and other, interventions that have already demonstrated promise. ‘System’ funding targets multi-partner interventions that have potential to influence key systems change levers. Collectively, the three funding approaches ensure an overall grantmaking model that is suitably holistic to the nature of the problem that the funder is trying to address (G.I.F.T., n.d.).

Diagram: Seed, scale, system
(CSI & Foundation North, 2019)

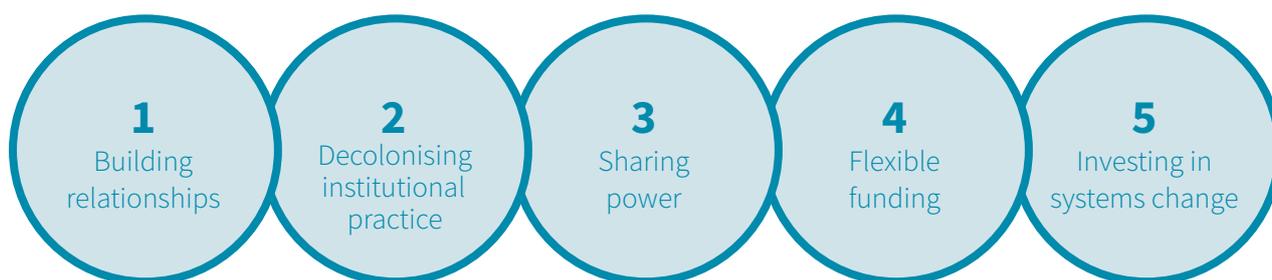
<i>LEVEL</i>	<i>FOCUS</i>	<i>FUNDING</i>
 SEED	LOOKING FOR POTENTIAL	<ul style="list-style-type: none"> • Fund people and ideas with the potential for radical innovation • Rapid learning and prototyping
 SCALE	GROWING POTENTIAL	<ul style="list-style-type: none"> • Early tests have shown potential for radical impact • Continued learning and iteration, some failure still expected
 SYSTEM	FINDING POTENTIAL IN THE SYSTEM	<ul style="list-style-type: none"> • Funding collaborative innovation for system change • Aim for intergenerational impact • Co-design, co-fund, collaborate, co-create



Five contemporary practices:

Decolonising philanthropy

For bi-cultural nations like Aotearoa New Zealand, it is imperative that philanthropy continues to find ways to be more responsive to the cultural practices, aspirations and sovereignty of Indigenous communities. Dialogue is opening up about how philanthropy can address the colonial structures of its own institutions, invest with a greater focus on racial equity and act in ways that empower Indigenous self-determination. This section explores five practices that can support ongoing dialogue and practice change:



Building relationships and mandate

Practicing Indigenous-philanthropy should reflect the ‘four Rs – respect, responsibility, reciprocity and relationships’ (International Funders for Indigenous Peoples [IFIP], 2015). When seeking to invest in Indigenous communities, philanthropic funders first need to understand the context, tikanga or cultural norms and values, history and aspirations of the community that they are seeking to engage.

Through listening and relationship-building, philanthropic funders can begin to develop an understanding of an Indigenous community’s aspirations, identify shared values and interests, and co-design opportunities to use resources in ways that are both needed and wanted. The investment of resources should be the result of mandate – an invitation and call to partnership from the community – rather than the starting point for engagement (GrantCraft, 2015, Scott-Enns, 2017).

“The humility, grace and insight that Indigenous philanthropic relationships can foster may also allow us, finally, to collaborate with shared purpose, sufficient breadth and enduring impact.” (Acre & Stauch, 2016)

Addressing the impacts of colonisation, transforming systems that don’t work for Indigenous peoples and enabling cultural wellbeing are areas of work that need time. It is important that funders are committed to being in relationship with Indigenous communities for the long-term – and that they clearly signal this intent, and follow through with action (GrantCraft, 2015; Scott-Enns, 2017).

Decolonising institutional practices

As the international philanthropic community becomes more focused on equity, there is increasing recognition of philanthropy's need to adapt its own institutional practices to increase diversity, inclusion, cultural responsiveness and power sharing.

This requires philanthropic organisations to undertake “a candid and honest assessment of the colonial structures that perpetuate bias and privilege, and [ensure] the creation of safe spaces that Indigenous people can occupy” (Elson, 2018, p.2).

In the New Zealand context, funders should consider:

- How their organisational values reflect the principles of Te Tiriti o Waitangi.
- How their organisational cultural intelligence and capability can be strengthened as a basis for developing effective relationships with Māori.
- How their boards and staff reflect the communities that they serve, including opportunities for Māori to access decision-making and leadership roles, or functions, such as advisory groups.
- How their funding resources might be understood in the context of Te Ao Māori, and what this might mean for how the organisation seeks to share its resources with Māori communities.
- How their decision-making structures, processes and policies are accessible to and experienced by Māori, and how they may be adapted and decolonised to operate in ways that are more responsive to and enabling of Māori aspirations.
- How unconscious biases in policies and decision-making practice may be uncovered and addressed.
- How decision-making might be shared with Māori (see pp.25-26) (CSI, 2018b; CSI, 2018d).

“It may not be feasible for some foundations, particularly small family foundations, to bring in non-family board members. In that case...steady, incremental changes in operations [are advised], such as diversifying staff with Indigenous expertise. The important thing is to make sure that you don't do one small thing and then stop.” (GrantCraft, 2015, p.28)

Sharing power

“Allocating more funds towards Indigenous causes is critical. However, as much as we aim to demonstrate respect and reciprocity, traditional grantmaking reflects paternalistic power dynamics that do not facilitate true reciprocal relationships between equal partners. Indigenous organizations must ask for money and foundations hold the power to grant it – or not. I want us to be honest in the fact that no matter what feel-good version we tell ourselves, that we value grantees [ngā kaikōkiri] as equal partners. Indigenous grantees [ngā kaikōkiri] are ever aware of who makes the decisions for resources they desperately need, and it is not them. We will be held back from leading the necessary change if we cannot accept this truth first.” (Scott-Enns, 2017, p.1)



The emerging examples of philanthropic organisations sharing power with Indigenous communities vary in terms of the levels of power sharing – ranging from unrestricted grants to Indigenous-led grantee organisations, through to sharing and even ceding control of resources to communities:



- Providing unrestricted funding to grantee organisations that are Indigenous-led, enabling self-determination and autonomy in terms of how resources are utilised by the organisation to achieve community aspirations.
- Designing funding programmes that are flexible and therefore more accessible to Indigenous organisations that often adopt more holistic approaches to service delivery; as well as designing mechanisms that allow funding to reach into grassroots Indigenous organisations whose legal structures may not meet traditional philanthropic funding eligibility criteria.
- Working collaboratively with Indigenous communities to determine how resources might best be used – which may include the identification of funding priorities or the co-design of whole funding programmes.
- Empowering Indigenous communities to lead participatory grantmaking processes, determining how and where resources are distributed – often within the parameters of a shared interest area between funder and community.
- Fully ceding control of resources to Indigenous communities – often via a partnership with an Indigenous intermediary organisation – for communities to determine and implement their own visions for impact using the available resources. In such examples, the funder may identify a vision to achieve impact for Indigenous communities without setting any further parameters on what impacts would be prioritised and delivered, or how funding would be used (GrantCraft, 2015).

“An empowerment approach is based on the right of Indigenous peoples to determine the nature and use of resources that come into their communities”. (GrantCraft, 2015, p.16)

Flexible, responsive funding

As philanthropy moves towards systems thinking, there are opportunities to learn from Indigenous approaches and find more flexible ways of mobilising resources to enable investment in initiatives that are led by Indigenous communities and are, often, more holistic in approach.

“Funders who work with Indigenous peoples will often receive proposals that do not fit neatly into a single program area, but cut across several.” (GrantCraft, 2015, p.15)

This challenges funders to think about how their funding approaches can be more flexible and responsive to Indigenous ways of working. Opportunities to increase flexibility and responsiveness include:

- Redesigning overly-rigid funding programmes, creating space for more holistic approaches to achieving impact.
- Adapting or removing barriers that reduce accessibility for Indigenous communities – including restrictive funding policies and non-relational funding application processes.
- Multi-year funding that enables funder and community to build trust and understanding.
- Providing unrestricted funding that enable Indigenous communities to have greater autonomy over the way they work.
- Re-thinking how ngā kaikōkiri report and tell their stories of impact in ways that are accessible and empowering (GrantCraft, 2015; Scott-Enns, 2017).

“Application and reporting policies could be more inclusive and create the space for Indigenous partners to determine what strengths and assets empower their organizations and what methods and approaches best tell their stories.” (Scott-Enns, 2017, p.2)

Investing in systems change

There is a growing understanding of the impacts of colonisation on the wellbeing of Indigenous communities. Intergenerational trauma and disadvantage, ongoing racial bias and discrimination, and the privileging of western world views and systems disadvantage and exclude Indigenous communities. In New Zealand, literature describes the impact of systemic discrimination, colonising practices, social marginalisation, the limiting of access to Te Ao Māori (the Māori world), and ongoing racism, on the physical, mental, whānau and spiritual wellbeing of Māori (Clarke, Le Grice, Moselen, Fleming, Crengle, 2018; Becroft, 2015).

Addressing the colonising practices and structural inequalities within existing systems is vital work. It requires investment not just in initiatives that deliver outcomes for Māori, but also investment in initiatives that help to redesign and decolonise the systems that perpetuate these inequalities. This type



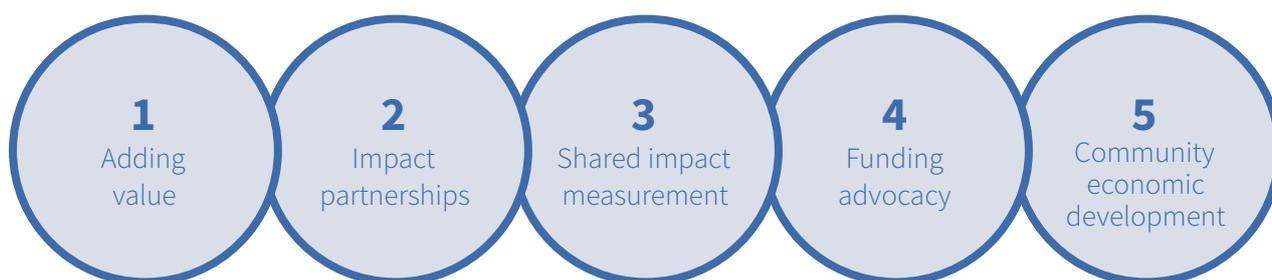
of systems change is something that philanthropy has potential to play a significant role in enabling and influencing, in ways that governments cannot (CSI, 2019a, 2018a).

Investing in systems change to address the impacts of colonisation for Māori starts with enabling self-determination, privileging Māori and iwi priorities, and investing in practices that:

- Enable advocacy for structures and systems built on the Treaty of Waitangi.
- Build a collective and cross-sector focus on driving Māori outcomes, and transparency on reporting on these outcomes.
- Restore mana and self-determination, are whānau-centred and engage whānau in solution-design.
- Enable the adaptation of systems and policies by putting cultural perspectives, values and understandings at the centre.
- Promote and demonstrate visible Māori leadership and autonomy, and trust in Māori to lead the work.
- Enable Māori or bicultural governance models.
- Transform education and employment pathways for Māori youth (Tokona Te Raki, n.d.; BERL, 2017; Lloyd, 2018; Massey University, 2017; Mikaere, 2019; Frykberg, 2019).

Five contemporary practices: Philanthropy and government

Philanthropic investment has long operated in parallel to public spending – typically filling gaps or trying to enable new ways of working that can influence universal or mainstream services. Philanthropy and government are increasingly recognising one another’s value. This section identifies five ways in which the two sectors are seeking ways of working more effectively together and/or in parallel, to support the systems and services that enable public wellbeing at a national scale:



Adding value – leveraging the unique attributes of philanthropy

The New Zealand philanthropic sector plays a significant and unique role in delivering impact alongside the New Zealand Government. The unique roles and attributes of philanthropy as perceived and valued by both the philanthropic sector and government in New Zealand include:

- The ability to be flexible in terms of who, what, when and how to fund based on both need and potential for impact i.e. “being agnostic in approach” (CSI, 2018a, p.3).
- A willingness to adopt both holistic and targeted approaches to funding issues and outcomes.
- The ability to invest in ways that go beyond traditional government contracting paradigms and enable community organisations the financial freedom to implement models of working that align with best-practice.
- An appetite to take greater ‘risks’ than government, by investing in new organisations or untested initiatives, and subsequently developing an evidence base to inform mainstreaming through government investment.
- Greater discretion to work in ways that are nimble by, for example, making rapid decisions or changing approach mid-way through an investment if there is opportunity to integrate learning or improve impact.
- The opportunity for philanthropy to amplify and activate significant government strategies through the provision of additional investment.
- The ability of philanthropy to provide a ‘bridge’ between government and the voices and experiences of people targeted by government policy and investment strategies – for example, children and young people (CSI, 2018b).

Philanthropic literature suggests that funders should seek to leverage these unique attributes as a priority over general ‘backfilling’ of government underspend.

“The key is to identify high-impact opportunities to provide dollars that government is not in a position to supply or make investments that will leverage or increase the effectiveness of much larger sums of public funding.” (The Bridgespan Group, n.d.)

Government-philanthropy impact partnerships

Whilst the philanthropic sector plays an important role alongside government, there are opportunities to leverage unique impact by working intentionally in partnership with government. Philanthropy-government collaborations have potential to:

- Create a shared agenda for investment in social outcomes.
- Increase the size and scale of investment into initiatives and practices that work.
- Enable faster scaling/mainstreaming of innovations that show promise.
- Support systems changing by bridging learning from the project environment into wider investment strategy and policy environments i.e. work at both the project and policy levels.

To work effectively, philanthropy-government partnerships are characterised by:

- A focus on issues or outcomes where innovative practice could be of most value to government.
- Collaboration between multiple philanthropic organisations, to increase resources, buy-in and influence.
- Deliberate investment of time and resources into structured mechanisms for sharing learning to support wider changes in practices within the respective institutions.
- Engagement of government from an early stage, to provide better opportunities for influencing future government policy and investment design, and to support momentum towards the mainstreaming of initiatives that work.
- Co-funding by government, to increase buy-in.
- Ways of working that address institutional barriers within government – particularly around funding contracts and reporting.
- Collaborations that work across government departments, to support whole-of-systems thinking and impact (CSI, 2018a; Boyle & Shannon, 2018).

“Innovation resourced by philanthropy is often developed in response to policies and systems that aren’t working – such as the youth justice and foster care policies, structures and practices. Where philanthropy is piloting, trialling and testing initiatives that demonstrate potential, how can evidence be shared with government in more systematic ways that generate opportunities for government to build on this early potential? This may require better mechanisms for sharing insights, and for earlier-stage collaboration between philanthropy and government.” (CSI, 2018b, p.6)

Shared impact understanding and measurement

In New Zealand, the development of the Living Standards Framework by The Treasury represents an opportunity for philanthropy and government to align their understanding of impact, and also to measure impact, in relation to shared indicators of wellbeing (The Treasury, n.d.). This opportunity builds on precedents involving the United Nations Sustainable Development Goals, which are widely used internationally by both governments and philanthropists to inform how they prioritise and measure impact (SDG Philanthropy Platform, n.d.).

Wellbeing is complex and dynamic, and philanthropic organisations are well placed to work in ways that respond to this complexity. In doing so, philanthropy can play a role in sharing insights with government to support and evolve the New Zealand Government's thinking about the determinants and measurement of wellbeing (Kaplan, 2018). This is particularly important in relation to the Government's understanding of wellbeing in the context of community aspirations and in the context of Te Ao Māori (Te Puni Kōkiri & The Treasury, 2019).

Funding advocacy

Advocacy can be described as activities that make a case for a particular issue, cause or mission. Individuals or organisations that work on advocacy undertake a range of activities to directly achieve or influence change – including research, awareness campaigns, sharing marginalised voices or empowering those affected by an issue to lead change.

Across this range of approaches to advocacy, a key outcome is helping people with expertise on an issue – either those with lived experience, or those otherwise working proximally to people with lived experience – get closer to those making key decisions that affect the issue/outcomes. Advocacy is, therefore, a key vehicle for driving changes in policy, public spending and service design (CSI, 2019b). In this respect, it is a space where philanthropy and government interact, with potential for systems-level change.

There is growing recognition within philanthropy that funding advocacy can deliver sought-after impact – helping to empower community voices, growing collaboration around key issues, advancing equity concerns, building an evidence-base for change, and helping to identify and tangibly address key systems pain points (CSI, 2019b).

Community economic development

There is strong evidence that income disparity is a key driver for a range of other social inequities (Wilkinson & Pickett, 2009). As philanthropic organisations grow their interest in equity or social justice philanthropy, more dollars are being invested into low income communities with a focus on building pathways to economic participation through education, social enterprise and community economic development.



“Economic development philanthropy requires that foundations play integrating or missing roles to advance regional economic development; they act to fill gaps that other organizations and agencies in the community or region are not addressing or do not have the capacity to address.” (Markley, Macke, Topolsky, Green & Feierabend, 2016, p.100)

In this space, philanthropy and government hold a shared interest – particularly concerning economic revitalisation in rural and regional communities. There are numerous examples of philanthropic-government partnerships focused on community economic development; many of which also include business sector co-investors. Exemplar models, such as the Foundation for Rural and Regional Renewal in Australia (FRRR), are often able to be more holistic in approach due to this partnership model, investing simultaneously across many issues and practices that government is not positioned to fund alone, including:

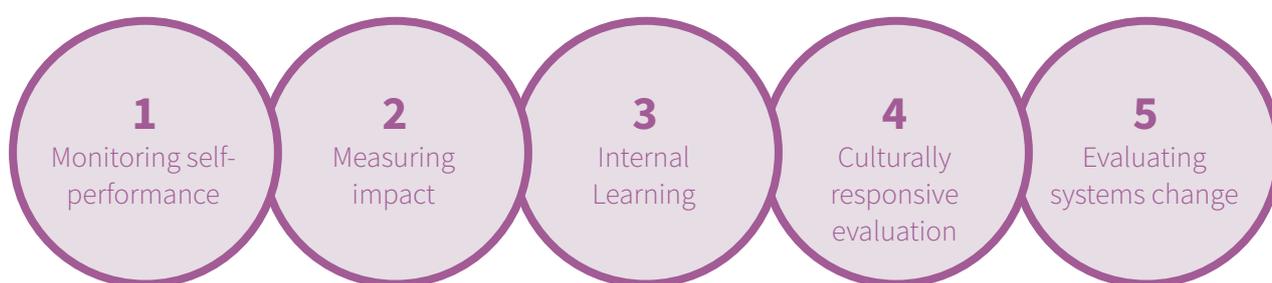
- Social enterprise development.
- Local skills development and education pathways that are particularly geared to local economic opportunities and the future of work.
- Building community resilience.
- Developing community and/or natural assets and infrastructures that can support community-led enterprise.
- Addressing environmental challenges (FRRR, n.d.; Markley et al., 2016).

Community economic development is an area that philanthropic organisations can engage with both through their grant portfolios and as impact investors.

Five contemporary practices:

Understanding impact

Understanding the impacts achieved through investment – both in the short- and long-term – continues to be both a significant challenge and imperative for philanthropy. Through monitoring, evaluation and, crucially, learning, funders are able to use evaluation not just as a means to uphold financial responsibility, but as a tool to support “better, faster and fairer impact” and strengthen future practice (Kaplan, 2018, p.2). This section explores five key considerations for understanding philanthropic impact:



Monitoring self-performance

Philanthropic funders in New Zealand are growing their capacity and capability to monitor and measure performance and impact. Performance monitoring is typically focused on collecting and tracking basic datasets that describe the extent to which grantmaking and other non-financial activities have been delivered with alignment to strategy.

Funders in New Zealand are beginning to develop monitoring data frameworks that collect pre-funding and post-funding information from ngā kaikōkiri, in order to track:

- Application reach i.e. whether the funder is attracting applications from priority communities; which in turn can help to direct future engagement efforts.
- Declined funding i.e. whether segments of the community are more or less successful in securing funding; which in turn can help the funder to understand issues with funding literacy and/or barriers that may exist in their processes and policies.
- Approved grants reach i.e. whether approved grants are reaching priority communities – defined by place, age or other population segment.
- Alignment with priorities i.e. the number of, and extent to which, applicants are aligning with each of the funder’s strategic priority areas; as well as the extent to which approved applicants felt that they delivered against these priorities (CSI, 2018e).

Collecting monitoring data in a manner that is consistent with population data sets – for example, by local authority area, or standardised age groups – also assists philanthropic organisations to understand

their data in the context of other population indicators. In this way, funders can understand the extent to which they may be, for example, under-funding communities of high deprivation (CSI, 2018e).

There are growing examples of funders sharing their monitoring data transparently to stay accountable to communities, to share what they have been doing with the data collected and how this has influenced changes in practice. The Esmée Fairbairn Foundation go further, openly explaining issues that they have identified about their practice that they still need to work on (Esmée Fairbairn Foundation, 2017; Candid, n.d.).

Measuring impact

In order to understand impact, funders must invest in evaluation that goes beyond anecdotal information. By investing in evaluation, funders can gain insight into:

- The types of outcomes being delivered by ngā kaikōkiri – both individually and across funding programmes – and how these outcomes align with the funder’s strategy and vision.
- Any unanticipated outcomes that have been achieved – which can help funders to either refine or reframe their focus/approach.
- The impact of their particular funding approach i.e. the unique impacts that were achieved as a result of the funder’s investment and other roles.
- The types of investment that might be required in the future (Putnam-Walkerly, 2014).

Ultimately measuring impact supports philanthropic funders to make more informed decisions about the types of investment strategies and approaches that might be required in the future, including:

- What to fund i.e. the approaches, programmes and services that are shown to be delivering good results.
- Who to fund i.e. the organisations that are able to consistently demonstrate impact, or demonstrate early promise in line with the funder’s intentions.
- How to fund i.e. the types of funding approaches that are shown to best contribute to the funder’s desired outcomes, including the types of non-financial roles that are shown to add the most value.
- When to fund i.e. the stage at which the funder’s unique investment best contributes to the desired outcomes – which may be, for example, by taking early risks on new projects, or by sustaining initiatives so that they can fulfil their potential.
- When to scale-up, redirect or divest i.e. the opportune time to increase investment in order to build reach and impact; or to redirect investments to new issues and opportunities.

Philanthropic funders are increasingly targeted in their evaluation approach. On a practical level, this allows for pragmatic use of internal resources, which are often limited. Being targeted enables funders to be “proportional and light touch” where appropriate, in order to take a deeper-dive on aspects of their grantmaking that they are most interested in (Esmée Fairbairn Foundation, 2015, p.9).

These areas might include evaluation of the:

- Efficacy of new funding programmes.
- Impact of large or long-term investments.
- Impact of grants that align strongly with strategic priorities.
- Added value of key non-financial roles, such as capacity building.

“Don’t try to evaluate everything. Not only is it impossible, it isn’t even beneficial. You probably don’t have the resources to evaluate in all of those areas, and you should be focusing on what’s most important to learn and where your evaluation resources are best deployed.” (Putnam-Walkerly, 2014, p.2)

Internal learning processes

Philanthropic boards, donors and staff benefit from opportunities to engage in learning about funding strategies and practices. Effective practice includes the implementation of regular and structured internal learning processes that either review insights from evaluative information data collected by the organisation over time or engage directly in learning dialogues with ngā kaikōkiri and other partners.

Internal learning processes should be designed to support funders – their operational teams and boards – to explore:

- Whether they have been reaching the intended audiences through their investments.
- The intended and unintended outcomes that may be attributable to the model of funding being used by the funder.
- Barriers or issues that may be overcome through changes to funding strategy or models.
- Opportunities to increase impact by iterating, adapting practice or changing approach– and how this might be implemented.
- How learning can be integrated into the funder’s mainstream practice so that yesterday’s innovation becomes tomorrow’s ‘business-as-usual’.

To ensure that learning is integrated into the funder’s practice, the funder needs to carve out dedicated time and space within their operational practice for these learning conversations. This can be achieved through, for example, regular internal learning meetings, post-funding de-briefs, roundtable conversations or even dedicated physical office space where staff can post their thoughts and reflections. Having a dedicated team member to lead, instigate and activate these learning practices can ensure that learning becomes part of day-to-day practice.

There is also an emerging practice within philanthropic communities of peer-to-peer dialogues intended to support the sharing of insights and learning. ‘Communities of learning’ can help funders to trouble-shoot, adopt promising practices and identify opportunities for co-investment or other forms of collaboration (Reid, 2016).



Culturally responsive evaluation

In the philanthropic context, evaluation has historically focused on financial compliance and understanding whether the grant was spent as anticipated. Over time, this focus has evolved to include a stronger focus on understanding outcomes achieved.

Literature referencing good practice impact evaluation describes the importance of enabling ngā kaikōkiri to describe the changes or impacts that are of value to ngā kaikōkiri, to their communities and to their long-term visions. This approach is particularly relevant for Māori and Pacifica organisations, enabling self-determination and sovereignty over their changes stories and how these are valued and shared. It is vital that research is not ‘done to’ Indigenous communities, but rather with and by (Cram, Pipi & Paipa, 2018).

“Only when evaluation is conducted in a culturally responsive manner will the evaluation results be relevant and meaningful.” (Cram, 2018, p.131)

Funders in New Zealand are encouraged to respect the validity of Māori knowledge and ways of knowing, and build their own knowledge of Māori practice models. Funders should prioritise investment in and/or commissioning of kaupapa Māori and Pacifica value-based evaluation approaches that are culturally responsive, strengths-based, and reflect the lived realities of Māori and Pacifica whānau.

Funders embarking on evaluation of Māori and Pacifica initiatives should consider whether:

- The evaluation approaches “reflect their values, culture, spirituality, experience, history, needs and priorities” (Cram, 2018, p.131).
- The evaluators able to work in ways that recognise Māori and Pacifica world views, and build effective relationships with ngā kaikōkiri.
- The evaluation approaches are culturally safe, and do not erode the mana of participants.
- The sharing of knowledge and insights between ngā kaikōkiri and funder is reciprocated through, for example, through the building of capacity.
- They as a funder are ready to receive and engage with evaluations that prioritise Māori and Pacific knowledge and understandings (Cram, 2018; Cram, Pipi & Paipa, 2018).

There is further opportunity for funders to support culturally responsive evaluation by enabling and empowering ngā kaikōkiri to further build evaluative capacity and develop their own Indigenous approaches to evaluation, which reflect Indigenous knowledge and understandings (Cram, 2018).

This can also assist Māori organisations with servicing the accountability requirements of government funding (Cram, Pipi & Paipa, 2018).

Evaluating systems change

Philanthropy now widely regards systems change as a promising way to achieve greater impact. However, engaging in systems change philanthropy is challenging, and evaluation of systems changes requires funders to test and integrate evaluative tools and practices that may be new to their organisations (Kania et al, 2018).

While evaluation is often conducted as a means to learn about the progress or impact of an initiative, evaluative thinking and continuous learning can be particularly important when working on complex issues in a constantly evolving system. This developmental evaluation approach can help funders challenge their assumptions, gather information on the progress, effects, and influence of their work, and see new opportunities for adaptation and change (Kania & Preskill, 2018; Latham, 2014).

Systems change evaluation should include a focus on understanding changes in relation to particular levers of systems change – including policies, practices, resource flows, relationships/connections, power dynamics and mental models (Kania et al., 2018). This may include a focus on, for example:

- Changes to the accessibility, quality and scale of pathways within a system.
- New linkages and connections between pathways, practices and policies in a system.
- Changes in the effectiveness of collaboration between actors in the system.
- The extent of shifts in behaviour (Latham, 2014; Preskill, Gopal, Mack & Cook, 2014).

In the systems change context, evaluation is not just about retrospectively understanding the changes that an intervention has made, but rather, supporting learning that enables adaptation whilst trying to address fast-moving, complex and interrelated issues. In this way, evaluation is a tool that funders can use to further their systems impact, helping them to:

- Gain deeper insights into the complex issues and environments that are holding the problem in place.
- Bring stakeholders together to test assumptions, share insights, and engage in collective sensemaking that can help influence further action.
- See how their efforts relate to the ‘bigger picture’.
- Strengthen the learning capacity of the system and its actors.
- Identify positive and negative unintended consequences and prepare for, or respond to, a variety of unexpected ripple effects.
- Have greater confidence in how to leverage their resources moving forwards (Latham, 2014; Kania et al. 2018; Preskill et al., 2014).



Practice summary

Designing strategy and structure	Using organisational values as a navigational tool for strategy design	Using data to make evidence-based decisions about strategic direction	Embedding lived experience into strategy design and decision-making structures	Structuring roles and teams around the functions needed to activate strategy	Using strategy as roadmaps only and embracing the likelihood of 'course corrections'
Achieving transformative impact	Focusing on addressing equity issues	Investing in systems change – i.e. shifting the conditions that hold an issue in place	Focusing on inter-generational impact and being prepared to take a long-term view	Building power, sharing power, and using power to influence change	Building the capability of people, organisations and whole systems
Grantmaking approaches	Investing in outcomes and letting ngā kaikōkiri (grantees) determine how to use funds	Adaptive grantmaking based on need, relationships and learning	Collaborating on systems change with other funders	Participatory grantmaking to share power with communities	Seed, scale and system funding to drive innovation
Decolonising philanthropy	Building relationships and mandate to partner effectively with Māori	Developing policies, processes and ways of working that work for Māori	Sharing resources and decision-making power with Māori	Developing flexible funding models that privilege Māori approaches/ ways of working	Investing in systems change to address inequalities and systemic biases
Philanthropy and government	Utilising philanthropy's unique differences to leverage better impact	Partnering with government to achieve scale, mainstream innovation and drive systems change	Growing shared indicators and measurements for impact	Funding advocacy to drive policy and systems change	Investing in community economic development as a shared space for addressing inequalities
Understanding impact	Monitoring self-performance and delivery against strategy	Measuring impact to support ongoing decision-making	Implementing regular and structured internal learning processes	Investing in culturally responsive evaluation practice and capability	Using developmental evaluation approaches to evaluate systems change

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*“Whāia te iti kahurangi ki te tūohu
koe me he maunga teitei.”*

*“Seek the treasure you value most dearly: if you
bow your head, let it be to a lofty mountain.”*

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