

Voice, Influence, Action:

*Funding Advocacy
for Impact*



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Foreword

Tēnā koutou katoa.

A quote favoured by Sir Roy McKenzie was that of Ralph Waldo Emerson who told us “*Do not go where the path may lead, go instead where there is no path and leave a trail.*” Forging a new course takes courage and commitment and a belief that the destination is worth the uncertainties the journey might hold.

The desire to catalyse positive change in the world around us is at the heart of philanthropy. It has often been said that the role of philanthropy is ‘to be the venture capital of social change’. Advocacy involves making a case for a cause or a movement and bringing it to those who have the power to make the change. It’s about approaching the mahi with the knowledge that many voices working in harmony can have a huge impact. It’s about amplifying the collective voice in order to be heard; including that of ‘experience experts’, or those with lived experience.

The J R McKenzie Trust has commissioned this report in order to gain greater knowledge and insight around an important funding area. This will inform our regular ten-year strategy review, readying us for its implementation in 2020. It’s important that we ensure the Trust remains relevant in contemporary Aotearoa New Zealand and that it channels its resources into being the most effective it can be.

The Trust has a long history of supporting the right of community organisations to advocate directly or to include advocacy in their work. It fits well with our vision of creating a socially just and inclusive Aotearoa New Zealand. We want to reaffirm that we are on the right track with this aspect of our work and gaining a deeper insight into the landscape is a good place to start.

Why fund advocacy? Many philanthropic organisations shy away from funding advocacy, given its perceived political nature and links with lobbying for profit. This type of funding requires courage but the reasons in favour of it are hard to ignore. It’s a potent strategy that can mobilise action and effect significant change. Government leaders have been pressed to take urgent action to address and eliminate issues by effective advocates acting together in powerful and coordinated ways.

Advocacy can surface the root cause of a problem allowing real transformation to occur, rather than simply applying a Band-Aid to a broken system. Advocacy concerns itself with giving the disempowered and disenfranchised a right to speak; those with lived experience are usually best placed to lead from the front.

A funder must be sure that the advocacy issue aligns with its vision and mission, and that it’s compelling for all the right reasons; the mahi can be slow-paced but its undoubtedly crucial. For this reason, a funder needs to commit – it’s more being an ally than a grantmaker. Advocacy funding is often a contribution to a long and fickle journey, but we must remember that it allows us to achieve together, what we cannot achieve on our own. It enables us to be part of the venture capital of social change.

We encourage you to read this report and see how its learnings might be applied to your funding model.

“Ehara taku toa i te toa takitahi, engari he toa takitini - My courage is not mine alone but is the courage of the many”

Ngā mihi nui ki a koutou katoa.



Robyn Scott
Executive Director
J R McKenzie Trust



Manaia King
Chair
J R McKenzie Trust

Summary

This report explores philanthropic funding of advocacy. It shares J R McKenzie Trust's (JRMT's) experience in the last decade of funding advocacy, views from organisations funded by JRMT for advocacy, views from other funders of advocacy and key messages from recent literature.

Advocacy involves making a case for a cause or mission to those who can do something about it. Many funders avoid or are wary of funding advocacy, given its perceived political nature and association with lobbying for private gain. Explicit funding of advocacy is rare in Aotearoa New Zealand, and sometimes funders face unnecessary barriers.

Funding advocacy can be tricky territory. Advocacy issues sit within complex contexts, change is unpredictable (and can take time); there are never any guarantees, and it can be difficult to show cause and effect between funding advocacy and outcomes arising.

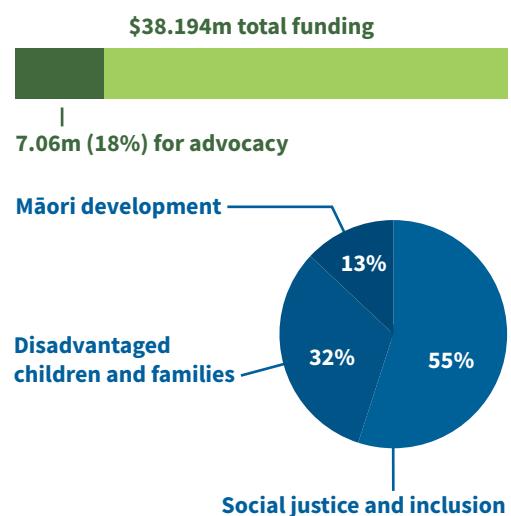
At the same time, funding advocacy can get to root causes, support a fairer, healthier democracy and achieve significant impacts for whole populations. Funder mandate or social licence to fund advocacy stems from each funder's vision, goals and values, community voice, understanding context, trusted advice and gut feel. Close attention needs to be paid to issues of power, morality, ethics, and who stand to lose or gain from advocacy.

Since 2010, \$7.064m or 18% of JRMT's \$38.194m funding has been directed explicitly to advocacy.

Of this, 13% was for Māori development; 32% for disadvantaged children and families and 55% for a wide range of equality, social justice and inclusion purposes. Examples of the many successes achieved by the groups funded for advocacy are shared in the report.

Effective funding of advocacy involves:

- strong alignment with funder vision;
- high trust funder relationships with savvy and skilled advocates;
- committing over time while providing responsive support to be able to 'seize the day';
- wrapping support around advocates, given the challenging nature of the work;
- providing evaluation support;
- user friendly funder processes; and
- a relational approach, involving respect, humility, honesty and transparency.



Future considerations for J.R McKenzie Trust

Based on experiences to date, JRMT is encouraged to grow its advocacy funding; to experiment, be bolder and to show national leadership in this space, as follows:

1. Continue to respond to ripe advocacy opportunities that align strongly with JRMT's vision and goals, and cultivate the skills within JRMT to recognise and get behind these 'diamonds'.
2. Build on the work of the Constitutional Transformation Working Group, Te Kāwai Toro and the indigenous peoples hui in 2017 to accelerate funding advocacy for Māori development.
3. As well as significantly growing Māori development advocacy funding, start identifying the next big issue/s for JRMT's advocacy funding focus: Pacific disadvantage? Migrant disadvantage and inclusion? Structural bias, including racism?
4. Play a stronger inspirational leadership role in philanthropy in Aotearoa around funding advocacy. This can potentially yield greater outcomes than JRMT acting alone or in small collaborations. It can include increasing professional development opportunities around advocacy nationally, growing the advocacy funding pool, building coalitions around strategic priorities, supporting the personal nourishment and replenishment of gifted advocates, and raising funder awareness of the wide range of ways to support advocacy.



1. An inquiry

J R McKenzie Trust (JRMT) is one of the very few funders in Aotearoa New Zealand that explicitly funds advocacy. JRMT commissioned this report to clarify:

- What advocacy is (and why fund it)
- JRMT's history of funding advocacy
- Strategic issues around funding advocacy
- Implications for JRMT's future funding of advocacy

Fourteen phone and online interviews with philanthropic funders and organisations funded for advocacy by JRMT informed this report¹, plus a review of JRMT documentation and selected literature. The aim is to inform JRMT's strategy around funding advocacy, which is being reviewed in 2019, and to assist other funders and advocates navigate their way in this area.

2. What is advocacy?

In its simplest terms, advocacy means making a case for a cause or mission². It is often focused on policy or legislative change but can occur for many purposes. Onyx et al. (2008, p.632) define advocacy as: "...active interventions by organisations on behalf of the collective interests they represent, that have the explicit goal of influencing public policy or decisions of any institutional elite" (Elliott and Haigh 2012).

More specifically, advocacy is when:

"...individuals and groups of people (who may be gathering in networks or coalitions) develop an opinion about a social issue, work to find evidence to support their stance on that issue, and share this evidence with those who are in positions to make changes to...that issue."
(Tow Foundation brochure, no date)

Advocacy operates on a spectrum from working to address a single issue or solve a specific problem, to being a vehicle for policy change and systemic change. Advocacy can involve gathering evidence, building a case for change, building alliances, growing awareness, raising marginalised voices, and empowering people to make change, including those most affected by an issue.

"We support the people with the most expertise to get closer to power and influence. Usually the people making the decisions look nothing like the people affected by those decisions."
(Tow Foundation)

Embedded within advocacy and the funding of advocacy are issues of power, morality, values and ethics:

"We bring our own lenses and our moral view to this area. Advocacy for or against same sex marriage for example. As funders we have the power of money, we need to be careful that we are funding what the community wants, that it is an ethical thing to do, not just change that you want to make or that might benefit you." (Kate Frykberg)

1 See Acknowledgements for the list of contributors.

2 See <https://bolderadvocacy.org/advocacy-defined/>



Some funders avoid or are wary of funding advocacy, due to its perceived political nature and/or conflation with lobbying for private or organisational gain (Grantcraft 2012). “We don’t do advocacy”, is a common refrain in philanthropy (Guerriero and Wolf Ditkoff 2018).

Advocacy can be a tool to support systems change. Systems change³ is ongoing, large scale, multi-layered and involves “shifting the conditions that are holding the problem in place” (Kania, Kramer and Senge 2018 p2). These interconnected conditions include policies, practices, resource flows, relationships and connections, power dynamics and mental models (ibid p4). Advocacy can also seek to influence any or all of these conditions, depending on the issue concerned.

Funding advocacy is notable for (Kelly 2018):

- the complex and dynamic context that advocacy efforts operate within, and the need for advocates to keep shifting their strategies and tactics in response;
- challenges proving attribution (direct cause and effect) between advocacy funded, and change made;
- the long time it can take for advocacy to gain traction;
- the need for a responsive funding approach to be able to ‘seize the day’.

3. Why fund advocacy?

Some of the **key reasons** to fund advocacy are outlined below.

As a change strategy

Funding advocacy is one strategy to achieve change – for some funders it is an essential strategy:

“Advocacy may not be the only strategy to crack a tough nut, but if you are not doing it, you’re fighting something with one hand behind your back. It might only be 20% of your giving, but if you’re not looking at an advocacy campaign then you are not really interested in addressing the problem.”
(John Spierings, Reichstein Foundation)

To get to root causes, systemic and structural issues

A core driver for groups undertaking advocacy and for funding advocacy is to address causes and the systemic and structural issues underlying individual plights:

“At what point does philanthropy stop taking the babies out of the river and walk upstream and see why they are falling in?” (Bharat Mehta, Trust for London)

To support a fairer, healthier democracy

Advocacy is a way to empower people to speak truth to power, and especially those on the margins (Philanthropy Australia 2018). It is a way to support public interests and ensure that private interests do not prevail over those of the majority. Elliott and Haigh (2012) note that advocacy advances participatory democracy and strengthens civil society, through public debate and education.

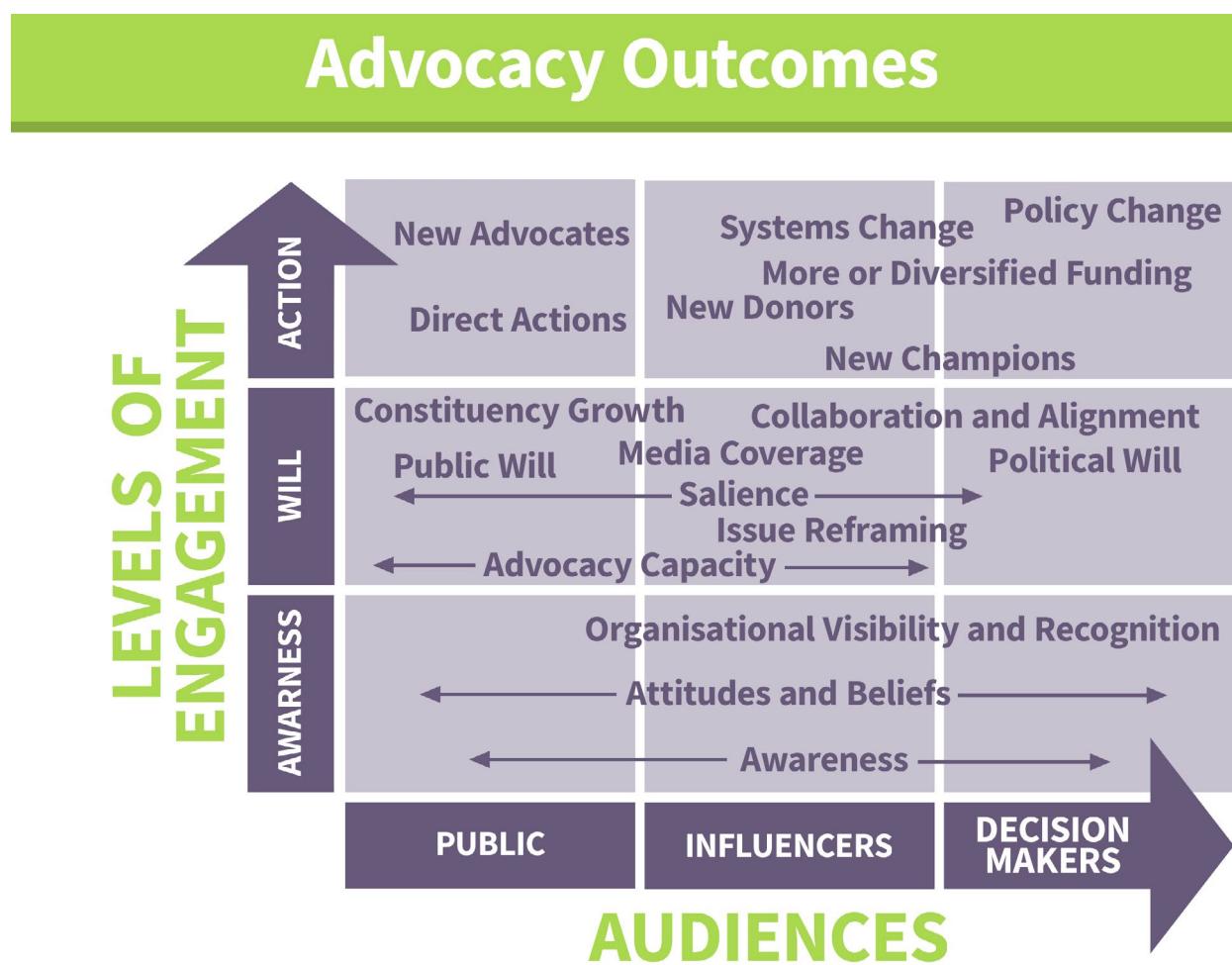
3 See New Philanthropy Capital 2015 Systems Change: A Guide to What It Is and How To Do It, for an accessible guide to systems change, <https://www.thinknfp.org/resource-hub/systems-change-a-guide-to-what-it-is-and-how-to-do-it/>



For greater impact

*“Fund school lunches or address the underlying causes? It’s worth funding advocacy because if you can get the policy wins you can impact on the lives of many people. The impact is potentially huge.”
(Ross Bell, NZ Drug Foundation)*

Outcomes from funding advocacy can include increased awareness, shifting norms, strengthened capacity of individuals, organisations and communities, improved policies, improved systems, and positive community and environmental impact (Kelly 2018). This diagram sourced from Kelly 2018 presents a range of advocacy outcomes, linked to audience and level of engagement.



For the Tow Foundation, which supports criminal justice reform in the USA, funding advocacy to change the system is far more appealing than pouring funding into ‘bandaidding’ a broken system:

“[Funding advocacy] does require a leap of faith. You may experience a fair amount of failure, but we think it is a bigger risk to continue to invest in things that have already been proven to fail. Governments are pouring billions of dollars into policies and practices, such as mass incarceration, that we know don’t work. Our board does not think it is high risk to invest in alternative strategies. In order to catalyse systemic change for whole populations, you need to support advocates to be the influencers.” (Tow Foundation)

Funding advocacy is described as an “ambulance at the top of the cliff rather than bottom of the cliff approach” (Reichstein Foundation). Advocacy can appeal to funders where there is:

- a compelling issue aligned with their vision
- something that can be won or changed
- something to put on the public agenda
- a desire to take a moral or ethical stand on an issue
- a desire to support people with lived experience of an issue to lead.

4. How funders can support advocacy

Legislative context

In New Zealand, charities can advocate for a law or policy change if it supports the charity’s main purpose (2005 Charities Act section 5.3). Charities may not however engage in partisan political activity, such as promoting or opposing a political party or a candidate for political office.

The 2005 Charities Act is currently under review, with a discussion document out for public feedback by 31 May 2019 . Specific feedback is sought on whether greater freedom should be given to charities to advocate for law or policy change, or whether there should be limits on advocacy by charities. Issues identified are that the current regulations are difficult for charities and the public to understand; the law is difficult for the regulator to apply; and the law on charities and advocacy may be too restrictive.

Ways to support advocacy

At the heart of funding advocacy is choosing to back individuals, groups and organisations who are perceived to be articulate, ethical, trustworthy, progressive and effective. Supporting advocacy can utilise the diverse powers of philanthropy:

“We invest in leaders who are way ahead of us. These people are already change makers. There is a car, we put in a bit of petrol in it, we don’t own the car or the direction, we just service the car.”
(JRMT)

“Most of our investments in advocacy go beyond direct grantmaking. We practice strategies such as convening, using our credibility and reputation to bring people who wouldn’t normally have the opportunity to talk to each other together on neutral territory to problem solve. Important, informal relationship building is fostered by these types of gatherings. Strategies such as this can often be more influential than traditional, structured grantmaking.”
(Tow Foundation)



Table 1: Philanthropic avenues to support advocacy

Type of support	Description	JRMT and other example/s
Direct funding	Through a structured application process or via responsive funding mechanisms	JRMT's biannual funding rounds and 'out of round' funding, see section 5.1
Convening	Bringing diverse groups together to surface ideas and identify solutions	JRMT co-convened the 2017 International Funders for Indigenous Peoples (IFIP) Pacific Regional Hui
Voice, participation and community organising	Supporting diversity of participation and those at the grass roots to raise their voices and help lead change	Just Speak's Kōrero Pono – The Voices of Lived Experience
Building advocacy skills, knowledge and leadership	Skill development for advocates in areas such as campaigning, social/media, communicating	JRMT funded Hāpai Te Hauora, with Australian Progress, to upskill advocates and campaigners. There is now an ongoing partnership to deliver this training
Coaching and mentoring	Resourcing mentors and advisors for change makers	For See Here, JRMT connected the project manager with two mentors to help problem solve
Advisory Groups	Convene or resource an advisory group to guide and awhi/support advocates; this can lend credibility, visibility and mana and benefit all involved	JRMT facilitation of the See Here Advisory Group
Research, evidence and evaluation for change	Funding research to give views, evidence and mandate for advocacy	Child Poverty Monitor ⁴ , Philanthropic Funding to Māori report ⁵
Networks, reputation and influence	Using funder reputation, influence and networks to strengthen advocacy efforts	Trust for London allows groups to hold meetings at their offices and use the Trust's name if useful
Raising public awareness	Supporting a group to raise or keep an issue on the public radar	Child Poverty Action Group's work, Just Speak, ActionStation
Collaboration and partnering	This can range from co-funding, to brokering collaborations around an issue, to a funder being a partner involved in decision making	The Child Poverty Monitor is a three way partnership, in which JRMT is part of the governance and decision making group
Skills exchange	Includes seconding, staff swapping and sharing skills amongst those working on an issue	Trust for London works with organisations such as the Greater Authority for London to second their staff into advocacy groups they fund, to share expertise and for these outsiders to experience the 'coalface'
Policy development	Supporting groups to develop credible policy alternatives	NZ Drug Foundation ⁶ , Just Speak
Lobbying	Supporting direct engagement with policy makers and elected representatives, to influence the outcome of policy debates	Just Speak, Child Poverty Monitor
Litigation	Funding or using legal action as a tool for change	Tow Foundation, Reichstein Foundation
Direct advocacy	Funders making submissions and seeking to influence decision makers	See JRMT examples in section 5

The diverse possible ways to support advocacy can match the diversity of philanthropic organisations in New Zealand, with their differing goals and priorities, risk appetites and preferences regarding engagement with policy and the political process.

4 See <https://www.childpoverty.org.nz>

5 See <https://jrmckenzie.org.nz/wp-content/uploads/2017/12/1.-Final-Report-Phil-Funding-to-M%C4%81ori.pdf>

6 See <https://www.drugfoundation.org.nz/policy-and-advocacy/drug-law-reform>

5. J R McKenzie Trust's advocacy support history

JRMT has supported advocacy indirectly since its inception in 1940, by funding groups with social change and policy agendas. Many groups funded by JRMT undertake some advocacy as part of their work.

JRMT occasionally directly undertakes advocacy via letters, submissions and approaches to politicians and government officials. Examples include making submissions on the Green Paper on Vulnerable Children in 2011, the Child Poverty Reduction Bill 2012 and the Education Review (Tomorrow's Schools) in 2018. JRMT has a policy relating to when it will consider undertaking advocacy directly: when it aligns closely with the Trust's vision and strategy; can be based on evidence and provides possible solutions to the issue. See Appendix A for this policy.

Pre 2010, JRMT was a more conventional funder, in the sense of providing smaller amounts of funding to a wide range of organisations and purposes. Since 2010, JRMT has moved to funding fewer groups for larger amounts and has identified supporting advocacy for purposes that align with JRMT's vision and goals as a core focus (see the 2010-2020 JRMT Strategy at Appendix B).

JRMT's three proactive programmes all include elements of advocacy. Te Kāwai Toro, which aims to support Māori development and increase funding for this nationally, is increasingly weaving advocacy into its mahi. Advocacy is also supported in JRMT's proactive Connecting Education and Communities programme and Peter McKenzie Project, which is focused on systemic change to help all families in New Zealand to thrive. The clearest example of proactive advocacy to date by JRMT is the See Here project, which was initiated and project managed by JRMT (see 5.3).

In recent years, as well as funding groups for advocacy, JRMT has funded a training programme in advocacy and built some connections among advocates.

5.1 JRMT advocacy funding 2010 to 2018

JRMT advocacy funding by strategic goal

JRMT's vision is "*A socially just and inclusive Aotearoa New Zealand*". JRMT's advocacy funding from 2010 to end 2018 is presented in Table 2 by strategic goal:

- 1. Māori development;**
- 2. Disadvantaged children and families**
- 3. Equality, social justice and inclusion**

Note that all of these goals contribute to the Trust's vision and many of these projects contribute to more than one strategic goal. Groups and funding have been allocated based on the perceived primary goal and contribution of each project.

The table on the following page includes advocacy funded via 'Out of Round' funding totalling \$84,580. These are small-scale grants of up to \$30k given to respond quickly to an issue or opportunity outside of JRMT's two annual funding rounds. This funding has its own decision making and approval process.

Note that there is no intent to underplay the advocacy work of JRMT funded groups not on the following list.



Table 2: JRMT advocacy funding allocated by strategic goal and total advocacy funding by goal, since 2010

Strategic goal	Organisations funded for advocacy	Purpose	Total advocacy funding by goal since 2010
Māori development	Constitutional Transformation Working Group	Engage with Māori and develop a model constitution for Aotearoa based on kawa and tikanga ⁷	\$554,700
	Mana Tāne o Aotearoa	To improve Māori men's health, at individual and systemic levels	\$386,600
		Total	\$941,300
Disadvantaged children and families	Action for Children and Youth Aotearoa	A network of academics and others that produces the national UNCROC report every five years, alongside the NZ government report	\$100,000
	Child Poverty Action Group	Funded by JRMT since the 1990s, see section 5.3	\$825,625
	NZCYES (Otago Uni)	Child Poverty Monitor and the preceding Child Health Monitor	\$869,348
	Office of the Children's Commissioner	Child Poverty Monitor	\$450,000
	Social Justice Unit, Anglican Care	Nationwide school art competition on child poverty, which led to an art exhibition at Parliament	\$5,000
	UNICEF NZ	Tracking UNCROC progress and collaborative submission to Green Paper on Vulnerable Children	\$33,000
		Total	\$2,282,973
Equality, social justice and inclusion	ActionStation	Citizen and community led campaigns	\$382,585
	Auckland City Mission	Analysis and dissemination of Families 100 research project on lived experience of poverty	\$110,025
	Auckland Resettled Community Coalition	Address resettlement issues of refugee newcomers	\$258,000
	Intersex Trust Aotearoa NZ	Advocacy on behalf of intersex community	\$270,000
	Living Wage Aotearoa	Research and evidence around the Living Wage ⁸	\$514,276
	National Council of Women in New Zealand	Tackling gender norms, stereotypes and attitudes and mobilising for change	\$324,000
	NZ Council of Christian Social Services	Campaign advocating for greater equality and inclusion. Helped produce the Equality Network	\$70,000
	NZ Drug Foundation	Drug reform, see section 5.3	\$1,010,800
	Just Speak	Justice reform advocacy	\$680,000
	ACHIEVE	Access to post-secondary education for people with impairments; admin costs	\$3,000
	Centre for NZ Progress	Upskill campaigners and a 48 hour campaign competition	\$30,000
	Equality Network	For a networker, website manager and national hui	\$26,460
	Income Equality Aotearoa NZ	Website upgrade	\$4,000
	Law for Change	To support law students to take part in advocacy work	\$7,577
	People First NZ	Small grant towards 10th anniversary	\$2,500
	Hapai Te Hauora Tapui Ltd	Course to upskill advocates, in conjunction with Australian Progress	\$30,000
	See Here ⁹ (2010 onwards only)	To support moderately visually impaired children, see section 5.3	\$100,000
	Blind Foundation	Towards a national conference	\$17,000
		Total	\$3,840,223
		COMBINED TOTAL	\$7,064,496

7 See <http://news.tangatawhenua.com/2015/02/rangatahi-talk-constitutional-transformation-waitangi-175>

8 See p10 here <https://jrmckenzie.org.nz/wp-content/uploads/2017/12/Annual-Report-2015.pdf> for a story on the Living Wage.

9 Note that JRMT spending on See Here from 2005 to January 2010 was \$432,700

By strategic goal, of the \$7,064,496 allocated for advocacy since 2010, 13% was for Māori development; 32% for disadvantaged children and families and 55% for a wide range of equality, social justice and inclusion purposes. Few applications have been received for advocacy focused on Māori development, and this is a developing area for the Trust.

Advocacy funding from JRMT is generally for three years or less. Exceptions are grants for See Here and the child poverty work, which has been a JRMT focus since the 1990s. JRMT also helped initiate the Child Poverty Monitor. Most of JRMT's advocacy funding to date has been responsive. In rare instances JRMT initiates and runs an advocacy project, such as See Here. In a few cases, JRMT might join an advisory group or Board for the group funded. While not designed just for advocacy, JRMT's new Opportunities, Partnerships and Collaboration Fund opens potential for more responsive, collaborative funding of advocacy in Aotearoa.

Overall, JRMT's commitment to a social justice and inclusion vision from 2010 has fuelled its move into increased funding of advocacy. Also, funded groups have emerged or developed into seeking to effect deeper, more long-term change. JRMT tends to form a relationship with a group, then over time fund them for advocacy.

5.2 Proportion of JRMT annual spend on advocacy

Table Three shows JRMT funding allocated per year for advocacy by group since 2010. Funding is included where advocacy is the explicit agenda and core activity of the funding support.

Table 3: Proportion of JRMT's annual spend on advocacy, based on year in which the decision/s were made

Financial Year	Total JRMT Grant Allocation	Total Advocacy Allocation	% Proportion of Advocacy Funding
2010/11	\$3,834,000	\$452,000	12%
2011/12	\$2,702,000	\$844,700	31%
2012/13	\$2,588,000	\$974,323	38%
2013/14	\$2,822,000	\$181,416	6%
2014/15	\$3,390,000	\$1,069,712	32%
2015/16	\$3,091,000	\$563,385	18%
2016/17	\$3,888,000	\$813,000	21%
2017/18	\$5,085,000	\$1,384,960	27%
2018/19	\$7,690,000	\$781,000	10%
Total	\$38,194,000	\$7,064,496	18%

Since 2010, 18% of JRMT's overall spending has been allocated explicitly for advocacy. The amount allocated per year has varied from 6% in 13/14 to 38% of total spend in 12/13. This reflects a fluid, responsive approach by JRMT to opportunities arising, rather than a drive to spend any predetermined amount on advocacy.

The advocacy organisations who contributed to this report note that JRMT supports their advocacy work by funding over more than one year, having a user friendly application process, not overburdening groups with paperwork and written reporting, working in a relational, high trust way and funding people to make change:

“JRMT do funding really well, face to face reporting is great, three year terms, not expecting too much paperwork, reimbursing for meetings, funding for advocacy.”
(Laura O'Connell Rapira, ActionStation)

5.3 Successes

*“For a few hundred thousand the pay-off is huge. Criminal justice and drug reform were dirty words, now they are mainstream government policy. [JRMT] has helped shift NZ’s public policy debate on those two issues in a short amount of time. They were brave and picked politically charged areas.”
(Ross Bell, NZ Drug Foundation)*

A key driver for this report was the sense that through its social justice and equality vision and advocacy funding, JRMT is supporting groups who are tangibly influencing public policy and wider social change. Examples given of successes included:

- The work over many years of the Child Poverty Action Group and the Child Poverty Monitor, contributed to an acknowledgement six weeks from the 2017 general election that child poverty was an issue, and to direct government actions to reduce child poverty.
- The Living Wage has become part of national discourse, with the Coalition Government pledging in 2017 to implement a Living Wage for all workers in the core public service within the term of government. Many other employers have adopted the Living Wage.
- The New Zealand Drug Foundation has helped reframe drug reform as a health rather than a criminal justice issue.
- Just Speak contributed to raising the age of young people staying in the Youth Court to 18.
- JRMT has been a core funder of ActionStation since its inception. This group has created a platform for the engagement and raising of voices of thousands of New Zealanders on diverse issues, a ‘ground up’ vision for Aotearoa and made progress on a range of issues¹⁰: “We have realised that healing past hurts and lifting up people doing life the hardest is the way to go”. (*Laura O’Connell Rapira, ActionStation*)

As with building awareness and action around child poverty, supporting Māori development is seen as a ‘slow burn’ area for JRMT that is now starting to bear fruit. JRMT focused on raising its funding allocation to Māori (from 3% in 2003 to 43% by 2013), after it commissioned a report into its funding practices. This led to a wider investigation of philanthropic funding to Māori nationally, spurring Te Kāwai Toro, to raise this level of funding and highlight the importance of supporting Māori development and tino rangatiratanga. An inaugural international 2017 indigenous peoples conference¹¹ in Otaki attracted 170 people from around the world, and the intentional leadership of JRMT to increase philanthropic engagement in Māori development in Aotearoa is considered key to progress. This is another form of proactive advocacy by JRMT.

More detail on three examples of JRMT advocacy funding follows.

Taking on policy and practice change - See Here (2006-2012)



See Here arose from a discussion with another organisation established by the same family - the J R McKenzie Youth Education Fund. The requests they had been receiving to fund children’s spectacles were increasing, and Trustees decided to explore why. See Here became a project created by JRMT to improve outcomes for children with mild to moderate, correctable vision loss. JRMT contracted a part time Project Manager and created a Steering Group that included professional leaders, academics, and a parents’ advocacy group.

10 See <https://2018.actionstation.org.nz> for the 2018 Annual Report outlining achievements.

11 See <https://jrmckenzie.org.nz/wp-content/uploads/2018/01/0002.-IFIP-Story-from-Giving-Matters.pdf>

A comprehensive case was developed on what was happening, the impact for children and families and what needed to change, including low family awareness of a government spectacle subsidy available for children. Among other things, JRMT funded brochures to raise family awareness of this subsidy, which led to a significant government budget blowout as families' uptake of the subsidy rocketed. See Here invested considerable time in building consensus across the sector, and taking up issues with decision makers within government. While not every See Here recommendation was implemented, the gains made were considered significant achievements for the \$500k spend on this five year project.

JRMT evaluated See Here and published a summary, along with a paper addressing evaluation issues. The Project Manager for See Here considers it important to provide a small amount of funding for follow up for advocacy projects, to see how embedded changes are over time.

Changing the landscape - drug reform (2015 onwards)

JRMT has funded the NZ Drug Foundation (NZDF) since 2015, to advocate for drug law reform and ensure that Māori have a strong voice in this movement. The focus of advocacy is to reduce drug harm and build a healthier society.



Executive Director Ross Bell credits JRMT's funding support as helping NZDF (among others) to shift the public policy debate around drug reform to a focus on health rather than punishment. A social licence has been created for politicians to say things that are 'normal' now that would have been controversial or even unthinkable a few years ago. This is an ongoing process of creating a new climate to enable different things to happen via the media, public awareness and government.

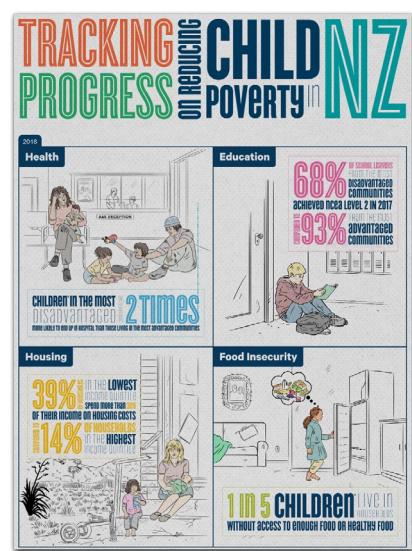
Partnering and building evidence for change - Child Poverty Monitor (2012 onwards)

“Funding the Child Poverty Monitor was an incredibly brave move by a Trust, and precisely the role that family philanthropy can play deftly and adroitly, it was the right thing to do. It gives the Child Poverty Monitor a perceived level of independence.” (Jennifer Gill)

The Child Poverty Monitor was established after the Expert Advisory Group on Solutions to Child Poverty, established in 2012 by the Children's Commissioner, recommended "proper and regular measurement" and "at least five official poverty measures" in order to set targets and measure progress towards addressing child poverty.

The monitor is the result of a partnership between JRMT, the Office of the Children's Commissioner and the University of Otago's New Zealand Child and Youth Health Epidemiology Service. The first monitor was released in 2013, with annual releases since then. This partnership combines a respected philanthropic body, the academic credibility of the University of Otago and an independent Crown entity and plays to the strengths of all. It is considered a great alignment of vision, purpose and values that is helping to bring child wellbeing further to the fore in New Zealand.

A 2017 review of the Child Poverty Monitor (CPM) concluded that it has become an authoritative measure of child poverty that is accepted by



politicians and influencers such as advocates and the media. The CPM partnership is considered to give the CPM impartiality, academic rigour and status. It found that public attitudes are shifting from blame to empathy around child poverty, at least partly influenced by CPM messaging about children and families not choosing poverty.

The current government has committed to child poverty reduction goals, which is an opportunity for the CPM partnership to use its expertise to contribute to this policy framework and make further gains. The review concluded that the monitor should continue until the partners are satisfied that new government frameworks are sufficiently rigorous to replace it.

The above gives some flavour of progress and achievements that funded groups have made via advocacy. See also these links¹² to additional case studies on JRMT's website.

6. Strategic issues

Funding advocacy raises the following strategic issues to consider.

6.1 Power and ethics

“Philanthropists have access to power structures, so how do we use this wisely? How do we ensure that it is not just our own world view that is supported? Or that we confine our advocacy support to things which indirectly benefit us? Social justice advocacy may question our own privilege - in other words may potentially deliver a negative personal return. Are we up for that?”
(Kate Frykberg)

Advocacy involves challenging the status quo and the privilege of some groups over others. It is important to be aware of power dynamics, who benefits from a situation, who may be disenfranchised, and the ethics of getting involved. John Spierings from the Reichstein Foundation recommends doing a 'power map' for any advocacy effort, which involves mapping allies, opponents, where influence lies and how to proceed.

The mandate or social licence for philanthropy to choose to fund advocacy on particular issues stems from a funder's vision and goals, their values, taking time to better understand the issue and its context, and from community voice, advice from trusted sources and sometimes plain intuition or 'gut feel'. It is also affected by the group dynamic of the decision makers and levels of trust between staff and Trustees.

Being ethically driven means focusing on the ethics and evidence around the issue, rather than the politics, and asking what is the right thing for us to do, in terms of our stated vision and goals? Transparency in funding advocacy and understanding other resource flows around the issue is key:

“You can be up against lots of people who think quite differently, other money can appear, which is less transparent and has deeper pockets.”
(Kate Frykberg)

Ensuring that community voice and lived experience guides philanthropic responses is also important, and is something that relatively few funders invest in.

12 Shakti Youth <https://www.jrmckenzie.org.nz/stories/shakti-youth-strong-advocates-of-social-change>, ActionStation <https://www.jrmckenzie.org.nz/stories/actionstation-mobilising-change-for-good> and Just Speak <https://www.jrmckenzie.org.nz/stories/justspeak-rallying-for-justice>. See also Atlantic Insights (no date) and the Tow Foundation brochure (no date) for USA case studies and Philanthropy Australia 2018 for Australian case studies.

6.2 No guarantees

“You can’t guarantee outcomes, but you can shift hearts and minds, raise voices and mobilise people.” (ActionStation)

“Our learning is that failing is fine, it’s fine to fund lost causes. It’s not about ‘is it effective’, not about its impact, you can’t take an impact lens, it’s more about ‘was it the right thing to do’, being a voice in the darkness.” (Kate Frykberg, Te Muka Rau Trust)

“Policy change is unpredictable. You can get everything lined up and nothing happens and other times ‘wham!', or one piece of work you supported takes off.” (Bharat Mehta, Trust for London)

While advocacy goals are usually clear and sometimes there is a single achievable goal, advocacy funding is often a contribution to what can be a long and unpredictable journey. Funders need to acknowledge that there are no silver bullets; that it is complex; that methods are likely to change to adapt to changing contexts – and be prepared for failure.

“It’s always messy, a mix of planned campaigns and opportunities to seize the moment. We had supported a group focused on female genital mutilation, but it took 15 years before it became a public issue; we need to build capacity for people to seize the moment when it comes.” (Sioned Churchill, Trust for London)

6.3 Nuanced and highly skilled

“Advocacy is nuanced, more subtle than I had realised.” (Judge Andrew Becroft, Children’s Commissioner)

In advocacy contexts, the people involved need to be mature and skilled operators, who can read a dynamic situation, manage risks and respond in ways that are constructive rather than aggravating.

“We crawl out onto the thin end of the branch, funding lets us get out there, but at any moment we could over-reach and the branch could snap and we could fall down. For example, with criminal justice, someone on a meth-fuelled bender does something and it shuts down again. The environment remains tricky.”

Funding advocacy doesn’t mean funding risky out of control things. We always think about how things look in the media, we are always positioning. JRMT has to trust that while we are out on the thin end of the branch, we have an awareness of our limits. Fund organisations that can be trusted to do that risk management.” (Ross Bell, NZ Drug Foundation)

Advocacy style is important, including insider or outsider advocacy strategies. Some issues require working within established processes, for example with government and out of public view, while others require a public agenda, media, digital communications, demonstrations or strategic litigation. Sometimes a mix of insider and outsider work is needed. The strategy needs to fit the decision making environment and degree of difficulty.

Advocates and funders can sometimes ‘parachute in’ on an issue, without being aware of the work of other organisations and the context—or of the most up to date information and approaches. In these cases there is a risk of setting things back. Checking the track record of the organisation on the issue is key, as well as looking for those who are at its front edge. Also, if people are angry they can be antagonistic, blaming, or can tell people what they should think—none of which tend to be effective.

“As well as being skilled and tricky work, undertaking advocacy can be lonely and personally taxing. Providing support for advocates can be a key role for funders. I feel really nervous for people doing the work. Connect advocates with other people doing the same work, give them wraparound support.” (Janet Digby)



6.4 Challenges

As well as its complexity and unpredictability, challenges around funding advocacy include the following:

- There are few funders in New Zealand of advocacy: “*A challenge is who else is open to funding this stuff, who is stepping forward?*” (*JRMT*). Clarifying what the law allows and exploring how funders can support advocacy in politically charged spaces aligned with their vision can help in this regard.
- Advocacy can create tensions and jeopardise funding, especially for social service groups who depend on funding from government. Some groups may ask for funding for advocacy which can instead go towards lobbying for their service – a level of independence from service delivery can be wise when funding advocacy, depending on the issue.
- Consider reputational risk, given the range of issues an organisation may be advocating on. Make sure there is general alignment of vision and purpose.
- People tend to advocate against something instead of for something. Negative messaging often fails – optimism, enthusiasm and positive messaging in advocacy is generally more effective, including the message that something can be done and can be done quickly.
- The pace of change and unpredictability of outcomes can make it hard for Trustees to commit to funding advocacy and to remain engaged.
- Public service churn affects this work: “*The turnover in the public service now is so great, public sector institutional knowledge has degraded, and the high workload of many public servants places many barriers on this work*” (*Janet Digby*). Philanthropic churn via changes in Trustees and staff can also be an issue.
- Change makers can tend to underestimate the tangible and intangible costs involved in advocacy, which can lead to the work being under resourced. A consortium of funders can share risks and bring different strengths to the advocacy effort.
- Risks associated with advocacy (such as a media storm) are best mitigated by supporting organisations that can be trusted to act ethically and strategically, and that have appropriate skills, track record and experience. Funders can also support advocates to be prepared when adverse events occur.
- Funders can be accused of doing the work of government when funding advocacy. However in the case of See Here: “[*The argument of] absolving government of responsibility is valid, but if it means government does the right thing, sometimes you just need to bite the bullet as a funder to put up some money to get things happening. The Ministry [of Health] picked up ongoing funding*” (*Janet Digby*).

6.5 Evaluating advocacy

“Successful advocacy efforts are characterized not by their ability to proceed along a predefined track, but by their capacity to adapt to changing circumstances.” (Teles and Schmitt 2011)

Evaluating advocacy can be challenging, given the dynamic context, many players involved and difficulty identifying attribution. Funders spoke of the importance of:

- building evaluation around what success looks like for the group and how they will know, including short and long term goals, and how to capture the journey and the learning;
- being clear about the purpose of evaluation, building in flexibility and ensuring that the funded group owns the evaluation;
- providing evaluation funding and/or support (e.g. JRMT provides funding for evaluation¹³ if needed and Trust for London partners with a charities evaluation service which specialises in capturing outcomes);
- focusing on the things you can quantify and encouraging people to capture as much evidence as they can;
- always using the word contribution and avoiding taking credit: for example many groups were involved in keeping young people under 19 in the Youth Court, and the Child Poverty Action Group and others have been agitating for decades on poverty reduction: “*We are links in a chain*” (JRMT).

Often advocacy groups have a specific goal, and progress towards that can be measured. Advocates and funders all have beliefs and assumptions about how change happens in particular contexts, which are in effect theories of change. Unpacking the theories of change at work in advocacy efforts can support evaluation of advocacy (Stachowiak 2013¹⁴).

For funders, the evaluation focus can rest on the contribution made to an advocacy effort and a set of outcomes. Questions might include: “*Would this campaign have got off the ground without our contribution?*”, “*Was our contribution distinctive?*”, “*What did we bring that others wouldn’t have?*”.

Rather than just evaluating the success of advocacy, evaluation questions can include: “*Did we do the right thing for our values and strategy?*” and “*What are we all learning?*”. Sometimes advocacy efforts fail or voices are overwhelmed (for example in the Campaign for Māori Wards), but supporting those voices to be raised can be the point of the advocacy funding.

6.6 Effective funding of advocacy

“The funder needs to have a level of commitment to that issue, it has to be compelling. It’s more being an ally than a grantmaker.” (JRMT)

“You need to ask a lot of questions and listen very deeply. Be willing to trust the people who are closest with the problem to come up with the solutions.” (Kate Frykberg)

A key role for funders is to ask themselves: “*What are the issues aligned with our vision where we can help make a change?*”. Identifying those issues is a skill for funders to keep honing, and it is one that JRMT has shown significant leadership in over the last ten years.

13 Note that JRMT has a ‘Value Added Payment’ of an additional 10% of the grant that is available to groups if they need it. The group is not told about this VAP until their grant is approved and it can be used for many purposes, including evaluation. This is another example of building flexibility and responsiveness into grantmaking.

14 Stachowiak shares ten theories of change relevant to advocacy and policy change efforts.

Table 4: Themes around how to effectively fund advocacy emerged as follows.

Vision, values and commitment	People, trust and relationship
<ul style="list-style-type: none"> Strong fit between funder vision and advocacy issue is critical The advocacy purpose and approach should be positive and ethical Work to understand the power dynamics, context and opportunities for change Commit for the medium to long term 	<ul style="list-style-type: none"> Trust based, high engagement, relational Quality of people and organisation is at the heart, including savvy operators Networks, mana and influence Focus on issues, remain politically neutral but build relationships and get to know civil servants
Advocacy style and approach	Why fund advocacy?
<ul style="list-style-type: none"> Consider track record, independence, theory of change, experience, insider or outsider strategies and campaigners, degree of difficulty Work from good information, which is not always data or evidence driven Consider the voice and role of lived experience 	<ul style="list-style-type: none"> Promote robust public discussion Robust research and grass roots voices inform action Diverse participation Community led solutions Root causes and deeper, long term change
Support growth, learning and connections	Funding approach
<ul style="list-style-type: none"> Invest in capability, mentoring, reflection, building collaboration and connection Support learning on all sides, be curious Build capability around Te Titiri o Waitangi, effective messaging and framing, evaluation, the media and campaigning Draw from overseas but develop locally Build a cohort of skilled advocates, mentor and nourish them 	<ul style="list-style-type: none"> Be humble and unattached to predetermined ‘results’; seek to influence the ecosystem around an issue Medium to long term, untagged, responsive, fast, flexible funding, while being alert to when things have run their course Keep close to those funded, allow them to be honest and to adapt as needed Co-fund, collaborate, build coalitions Lean, user friendly processes and reporting Take Trustees with you and diversify your organisation Provide evaluation support

Funders were challenged by the people interviewed to consider the following:

- Be more open about the change in the world you want to support, then state that you will fund advocacy for groups who are aligned with that change.
- When considering whether to fund advocacy, ask “*Is it the right thing to do in terms of our strategy?*”
- Use the considerable skills, networks and influence you have as funders for the cause, whether it is writing an opinion piece, making phone calls, meeting with decision makers, convening or building coalitions.

- Consider how your structures may prevent change and how you can break free of systems that create barriers, while protecting yourselves from undue risks. This may include funding umbrella organisations or funding individuals through contracts for service instead of grants. “*We have lots of structures, but lots of people who are doing good stuff, how can we support those people without requiring that they be part of an institution?*” (*Kate Frykberg*). Seeing how other funders get around these issues can be instructive.
- Consider being a ‘funding mole’ around advocacy issues, by funding work on what is happening on all sides of an issue, including what ‘nay-sayers’ are thinking and doing.
- Encourage more philanthropists to fund advocacy, especially those with visions and goals relating to equality, inclusion, social and environmental justice.
- Shift awareness and power dynamics by bringing more people with lived experience of the issues you seek to influence onto your board, committees, staff and advisory groups.

Several people noted that almost as important as the funding of advocacy is the vote of confidence it gives to the organisation concerned.

7. Implications

“If funders want to support social movements they need to: 1. Get Uncomfortable. 2. Move More Money.”
(Lemma 2018)

“We need to be brave. Funding advocacy is good for our mission and it leaves a legacy.”
(JRMT)

The JRMT experience with funding advocacy has been overwhelmingly positive and it has had a national impact. The mana and credentials of JRMT as a leader in funding advocacy in Aotearoa are also clear. Used skilfully as an enabling mechanism, funding advocacy leads philanthropy into the higher impact realms of influencing public policy, systems, social norms, and hearts and minds.

Strategic questions arising are: “*Given the clear benefits of funding advocacy, does JRMT wish to continue the present path, or take it to the next level? What would the next level look like? How bold, creative and disruptive are you willing to be?*”

Using the experience of the last decade as a platform, the next level for JRMT could look as follows:

1. an internal focus on furthering JRMT’s vision and goals; and
2. an external focus providing leadership nationally to support advocates and increase philanthropic funding of advocacy in Aotearoa.

7.1 Strategic advocacy funding to further JRMT’s vision

Continuing to respond to ripe advocacy opportunities that align strongly with JRMT’s vision and goals is important, and recognising these ‘diamonds’ is a real skill to be cultivated within JRMT.

At the same time, a priority focus for JRMT is Māori development and this provides a rich and broad canvas for the next level for JRMT in advocacy funding.

The work of the Constitutional Transformation Working Group, Te Kāwai Toro and the indigenous peoples hui in 2017 can provide a starting point. Genuine support for Māori development gets to the heart of JRMT's vision – to issues of power, racism, Treaty partnership, healing colonisation, equality and social justice. Te Ao Māori values and worldviews infusing those of wider society would also be truly transformative. One area suggested for advocacy funding is for greater national investment in those things that support Māori health and equality of opportunity:

“It is hard for Māori to get funding for advocacy and movement forward, let alone for basic social services. Where JRMT could be looking is the bigger picture—those key areas which are not funded enough by government, like Te Reo, Kohanga, Kura Kaupapa, Waka Ama and Kapa Haka. Fund and advocate for the things that keep people healthy—these are the things that no-one wants to fund.”
(JRMT)

As well as an internal strategic focus on funding advocacy for Māori development, JRMT can co-fund, partner and build coalitions in this area, and inspire and challenge others with a stated Māori development intent to be accountable to their vision statements.

From here, what is the next issue for JRMT's strategic advocacy funding focus? Pacific disadvantage? Migrant disadvantage and inclusion? Structural bias, including racism? These conversations can form a key part of JRMT's medium term strategy development.

7.2 Inspirational leadership in funding advocacy

JRMT is well placed to play a stronger inspirational leadership role in philanthropy nationally around funding advocacy, focusing in particular on JRMT's strategic goals. This approach can potentially yield greater outcomes than JRMT acting alone or in small collaborations. Suggestions here are:

- In the very short term, submit to the Charities Act Review, supporting the ability of charities and philanthropy to undertake and fund advocacy for charitable purposes, along the lines of the Australian legislation¹⁵.
- Co-fund and collaborate to increase the number and quality of training, learning and professional development opportunities around advocacy nationally, including lobbying, campaigning, storytelling, messaging and handling media and politicians.
- Creatively fund the personal replenishment, development and nourishment of gifted and talented people doing this challenging advocacy work. This can focus on individuals from JRMT funded groups only, or be more widely focused.
- Continue to work to grow the number of funders of advocacy and the resource pools for advocacy in New Zealand. This includes raising funder awareness of the wide range of ways to support advocacy as outlined in section four.

15 See Philanthropy Australia 2018 p1 http://www.philanthropy.org.au/images/site/publications/The_Power_of_Advocacy.pdf.
Also the February 2018 edition of Our Community Matters.

Appendix A: JRMT Policy on undertaking advocacy directly

The Trust will undertake direct advocacy only in the following circumstances:

- Where the issue relates closely to the Trust's vision and strategy
- Where our submissions can be based on evidence in support of the position we are taking
- Where our submissions can include possible solutions to the issue.

The following process will be followed to determine in each situation whether and how to proceed, and to approve the content of our message:

- If the situation arises in a timeframe that allows for discussion at a Trustee meeting, and there is time at that meeting:
 1. We test the situation against the above principles, and determine whether or not to proceed, and how.
- Otherwise:
 1. The Executive Director tests the situation against the above principles, and proposes action (submission, visit etc.) to Chair
 2. Chair determines whether or not to proceed, and the process of consultation regarding the content of our message (e.g. draft to all Trustees, phone call to most relevant Trustees, Chair's call, wait for next meeting etc.).



Appendix B: JRMT Strategy 2010-2020

2010 - 2020



Appendix C: References

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Appendix D: Online Resources

For online sites and resources to support philanthropic funders to understand and undertake advocacy funding see:

Bolder Advocacy – a USA based organisation that aims to give non-profits and foundations the confidence to advocate effectively and to protect their right to do so <https://bolderadvocacy.org>

The Atlas Learning Project provides a suite of resources to help funders and advocates achieve and defend policy change <http://atlaslearning.org>

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“Do not follow where the path may lead,
go instead where there is no path and leave a trail.”
-Ralph Waldo Emerson

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