

The Role of Grantmaker Associations and Support Organisations as Policy Actors; Philanthropy New Zealand's experience

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The New Zealand political system is a democratically elected MMP Government. This means minority parties can be as important as the major parties in determining whether legislation is passed and policy is developed.

The size of New Zealand makes it possible to have access to decision makers and key influencers. A more direct approach is possible and realistic and these relationships are key to the environment that Philanthropy New Zealand operates in.

There is a high level of dependency on the community and voluntary sector to provide core social services. There is greater devolution of policy making to local government and greater opportunities for involvement and consultation. But community and voluntary organisations have to work smarter to avoid being manipulated.

Philanthropy New Zealand engages in the policy making process in a number of ways. It takes a leadership position on behalf of members. It builds awareness and recognition around the value of the sector.

Advocacy

- Lobbying on key issues and legislation that impact on the philanthropic sector and the broader Community and Voluntary Sector.
- Issues that affect our members either directly or indirectly.

We use a critical decision making process to determine what involvement we will have in the policy making process.

- Ask and listen
- Know your members – their philosophies, hopes, ideas and aspirations
- Send appropriate signals – ‘ideas and opinions welcome’
- Invest in capacity to gather evidence and research on which to base the work.

As a grantmaker support organisation we have a responsibility to bring intelligent, informed analysis of the issues to the attention of members.

Getting started in the policy arena

1. Learn the legal limits and understand existing public policy around an issue. Talk to other organisations with an interest in similar issues.
2. Choose an issue with merit. Focus on a public policy issue that could:
 - Further member's efforts for greater community good
 - Build on the organisation's experience, interests and values
 - Flow logically from the strategic goals of the organisation.
3. Learn everything you can about the issue and members views on the issue.
 - Conduct research on the issue. Analyse the risks and benefits of influencing on this issue, based on research and evidence.
 - Study the big picture and where other organisations' sit on the issue.
 - Look for efforts relating to the issue that are particularly ripe for action.
4. Narrow the focus therefore choosing specific goals. Choose parameters within which to work and assess the potential value and impact on the issue.
 - Consider what's feasible – based on resources (of many kinds) and the desired level of engagement.
 - Choose goals that fit the vision and mission of the organisation.
5. Develop a Strategy to pursue your Goals
 - Choose strategic approaches –(eg. Fund research, support efforts by other groups, inform the public and other key influencers)
Involve key constituents
 - Develop relationships and enlist support from key partners and others
 - Commit sufficient funding and resources to make a difference
 - Capitalise on expertise and capabilities of those involved.
6. Assess and refine Strategies.
 - Document plans and accomplishments.
 - Evaluate your progress over time. Periodic re evaluation means you stay on course or shift and refine approaches.
 - Celebrate wins – big and small.

How Philanthropy NZ has engaged in Policy Development and policy influence.

Convening and Canvassing

–Bringing parties together, raising issues, and continuing the dialogue.

–Either formally or informally canvassing members for responses and utilising input into a formal process.

Conduit

–To key decision makers and influencers in government, government agencies and the wider sector, providing information and context.

Catalyst

-Our involvement in projects such as the Johns Hopkins data collection project. This is the study of the NZ Not for Profit Sector.

Participating

–Being at the table to listen and provide input. It may be to participate in the formal government processes already in place to deal with a particular issue. An example of this is Philanthropy New Zealand's role in the Charities Commission development.

David and Goliath - Building scale and scope

Champion the benefits of involvement in public policy both through individual actions but also by collaborating and cooperating with other organisations in the sector. Build strategic relationships with members of the sector and communities of interest outside the sector, such as business.

Mobilise the membership and work to educate members on how they can work to affect public policy, either through their own actions or through key influencers who are associated with or supportive of them. Use the news media.

Lessons

Learned

Engage with members – Ask and listen. Be prepared to offer intelligent analysis.

- Get involved early and be strategic
- Be prepared to invest – time and money
- Identify the key influencers
- Make time
- Balance the needs of all members.
- Build good relationships
- Be non-partisan
- Be inclusive
- Communicate on issues regularly with members
- Gather robust evidence to inform both debate and outcome.