

Philanthropy News

THE MAGAZINE OF PHILANTHROPY NEW ZEALAND

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Giving in Aotearoa 2021

Insights and top tips from the Philanthropy Summit

Funding Māori aspirations

with Whetū Campbell, Jodi Qereqeretabua and John McCarthy

Philanthropy Summit 2021

A snapshot of the summit experience

Movements and the role of solidarity in system change

Thousand Currents, Katherine Zavala



**Philanthropy
New Zealand**

Tiipitanga Tuku Aroha o Aotearoa

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By Sue McCabe,
Chief Executive, Philanthropy
New Zealand

From the CE

Tēnā koutou katoa

This Philanthropy News edition is dedicated to the amazing content from the Philanthropy Summit 2021, with its theme of Amplifying community aspirations - Te whakarahinga wawata ā-hapori.

The opportunity now is how to share the amazing wealth of insight, challenge, learnings and ideas generated to have maximum impact.

Our Philanthropy News editor Terri Petersen picked a few of the 28 keynote and workshop sessions to profile.

We present some of the feedback from attendees. The 89% satisfaction rate was good. As we expected, the data and the comments also told us that an online summit was nowhere near as good as the face-to-face version. The PNZ team missed catching up with our members too!

We're grateful for the members who hosted viewing parties on day one. A list of our viewing party hosts and other key helpers is on the back cover.

It takes a cast of hundreds to put on the summit. Sponsors, the Summit Advisory Committee, Te Kāhui Pūmanawa, the PNZ Board, speakers, facilitators and suppliers played a vital role. Thank you.

The summit progressed discussions and action on climate change; building understanding of Te Ao Māori; supporting a more inclusive society and making things easier for fundseekers. Other popular discussions included using more levers to amplify community aspirations like impact investment and social procurement, and improving our readiness for major events and how to support communities to respond and recover. There was frequent use of the word 'equity' at the summit as more funders are finding ways to check that their funding is reaching those that need it most.

We encourage summit attendees to get the most out of their experience through continuing to access the content generated and we're happy to talk to others interested in finding out more about the available resources.

Sue McCabe

The hero

This poem by PNZ Board member and Seed Waikato co-founder Gemma Major was shared at the beginning of the summit's closing keynote, [Towards a thriving Aotearoa](#).



Gemma Major
PNZ Board member and
Seed Waikato co-founder

An Aotearoa where everyone can thrive.

It's the reason we are here. It's the intention that lies beneath our work in philanthropy.

We are here in service to those who aren't in the room.

In service to those voices who shiver with winter upon us in overcrowded houses, desperate for a warm blanket or their child who has just got back from the emergency room for the fourth time this year.

In service to those voices who are tired of yelling in the streets for climate action.

In service to those voices who are silenced in the face of domestic violence, unable to see a way out.

In service to those voices who are yearning to bring their creativity into the world to inspire us all to imagine.

In service to those voices who have been traumatised for generations by policy designed to suppress, diminish, and destroy that which is sacred.

In service to those voices who cannot physically speak and know sustainability isn't enough, and regeneration is vital.

In service to those voices that martyr themselves to alleviate the ongoing suffering, not paid a wage for their unseen emotional and physical labour in homes and communities.

In service to those voices who have never seen anyone do things any different, deep down searching for an answer of when the cycles will end.

In service to those voices who had to make the decision this morning to buy a loaf of bread or sanitary pads, and now must stay home from school to bleed without shame.

In service to those voices who do not know they have a voice.

In service to those voices knocking on the doors of addiction to soothe the overwhelming disconnection from a society who has rejected them.

In service to those voices unheard yet seen as polluted riverbanks and riverbeds.

In service to those voices who are desperate for a job in a workplace that can honour their human and legal rights.

In service to those voices who have lost their identity and culture because of an education system that doesn't recognise that who they are is a gift.

In service to those voices who are hungry for a meal so they can find the energy to learn today at school.

In service to those voices who are fed up with a public narrative that discriminates, and perpetuates division.

In service to those voices who are frustrated for being viewed as nothing more than their unmet needs.

In service to those voices who want to dream, but haven't had the privilege.

In service to those voices who have succeeded despite the odds, and are turning their own pain and suffering into purpose to empower those who are yet to succeed.

In service to those who are holding a vision over their circumstance and are doing their best.

In service to those voices who are driving, leading, enabling change.

In service to those voices who are amplifying community aspirations.

We are here in service.

We are here to serve in a way that enables these voices to claim the achievement as their own.

We are here to work in ways that, by thoughtful design, devolve power and control back into communities to be the hero in their story.

We are here to work in ways that leave a lasting change in communities, which means working from the inside out, not the outside in.

Today I want to ask you: who is the hero in your story of philanthropy?

Thank you Gemma, for giving us permission to reproduce your poem.

Funding Māori aspirations

At the Philanthropy Summit 2021, John McCarthy, Whetū Campbell and Jodi Hayward presented the workshop **Funding Māori aspirations**. The following are some key points made in their workshop, which covered:

- Practical steps to funding Māori aspirations
- What Māori aspirations are
- What happens when Māori aspirations don't align with the funder's aspirations.



From, **Whetū Campbell**

Wellington Community Trust (WCT) Kaitakawaenga Māori Whetū Campbell is tasked with developing the framework and strategy to advance Māori aspirations in Wellington. He meets people in the community and listens to their aspirations. Through his investigation and kōrero with local iwi and rangatira he has the following key learnings:

- **Think the long game**
Māori aspirations often focus on long-term and intergenerational needs. For example, one iwi is developing their 200-year plan, and another is outworking their 1,000-year plan.

- **Partnership, collaboration and engagement**
You can't just tick a box and then be done with it in order to create good-looking statistics. Be prepared and invested to engage in a long-term relationship and partnership. Engagement is not hierarchical and transactional.
- **Be intentional**
WCT were open to allowing the process to take as long as it did to develop the approach well. This meant being led by the feedback and engagement with iwi, hapū and whānau.
- **Be strong**
WCT has good Māori representation on the Board, with three members who whakapapa Māori. A recent change to the Community Trust Boards deed means that there needs to be at least two trustees who whakapapa Māori. WCT's governance is also strengthened by a formal committee of the Trust called Te Ohu Manaaki. All committee members (there are over three) whakapapa Māori.
- **Be bold**
30% of WCT's 2021/22 financial year grant budget is ring-fenced to this kaupapa, with a minimum of \$1m annually moving forward. When challenged as to why it is not reflective of the Māori percentage of population, WCT note that this area has been underserved for so long and it is time to invest more now.
- **Be clear**
WCT defines Māori-led aspiration as having the majority of leaders of an organisation and those on the Board (51% or more) whakapapa Māori. A lot of good, strong organisations have Māori units and teams but decision makers don't whakapapa Māori.



From, **Jodi Qereqeretabua**

Jodi Hayward is the CEO of Te Pai Roa Tika o Te Taitokerau, a tikanga-led impact investment and development kaupapa. She has these tips for grantmakers wanting to fund Māori aspirations.

- **Similar but different**
Don't develop a blanket engagement approach for all Māori. Treat every interaction with the respect and attention it deserves.
- **Learnings are two-way**
Things don't always work out the first time so stay focused on the relationship and understand how mistakes have occurred. Take them as learnings and be sure to acknowledge when mistakes are made. The importance is the strength of relationship not a single transaction.
- **Allocate grant support for engagement**
Quite often funders want to invest in and support kaupapa Māori and want to dive straight into the detail about the opportunity or project. Allow time for engagement and use your grant funding to support this engagement. Recognise engagement as impact. If you provide whānau with space, time and resource to consider their aspirations, the impact of your investment will be clear.

- **Ancient practice and cultural practice will enable growth for us**
Māori have been traders, merchant and deal cutters for many a century and we want to create a space where we privilege the practices of our tupuna. We don't need to look out to validate how we operate; we don't need impact frameworks to show impact – we need to activate our own measures. The Māori economy is often described as a developing economy inside of a developed one. Our view is slightly different. Our view is our economic practises have just been dormant and overridden by others. Our job is to spark them up again.
- **Our organisational needs and structure is more expensive**
We need to create more space and time for engagement activity to occur; and for those receiving putea to determine what good looks like for them. What we need funders to realise and recognise is that engagement is impact. Spending time together and understanding differences is impact. Learning how to respect traditional measurement methods instead of imposing new ones is impact. Adjusting your systems to accommodate our practise is impact. I could suggest some of the biggest impact we could achieve here are the shifts in the way funders fund and measure.

Our CORE4Whānau of Funders (Foundation North, J R McKenzie, The Tindall Foundation and Todd Foundation) have decided to saddle up alongside us and evaluate how they can tweak their systems to accommodate and engage. This is an exciting space.

- **What does reporting look like?**
I encourage funders to consider these questions. What does relationship-based reporting versus an tick box deliverables look like? How are we privileging true engagement and true relationship-based activity?
- **Tupuna, tangata, tamariki: will our children look back and be proud of the work we have done?**
For many Māori, considering intergenerational impact is instinctive. Many Māori carry the expectations of their tupuna, while serving the tangata of the day and also considering the impact of their actions/decisions on their tamariki. It's not just about seeing a shift, change, increase in something now, its about considering layers of impact through an intergenerational lens.

What does that look like in your space? What are the systems and processes that you've got in your organisation that talk to that framework? If you don't have them, then it's time to start them.



From, **John McCarthy**

Manager of The Tindall Foundation (TTF) John McCarthy spoke about the process of working with Te Pai Roa Tika o Te Taitokerau. Some of his key takeaways were:

- **Actively embracing Te Ao Māori**
The Tindall Foundation team began their journey by taking te reo Māori and tikanga classes, this led to learning more about Te Ao Māori and understanding the effect of colonisation on Māori.

- **How TTF began supporting Māori aspirations**
They identified three regions to build connections with and they simply met with people in the community to build relationships and understand aspirations. Rangimarie Price, CE of Amokura Iwi Consortium, asked TTF to help with plans to deliver on growth in Tai Tokerau through impact investment.
- **What is TTF's role as a funder in Te Pai Roa Tika?**
Our role is to continue putting gas in the tank, but money is not the main event. It is about the significance and long-term possibility of that relationship.
- **What help does TTF provide?**
Continuing putting gas in, getting an impact investor advisor, making connections with other people who have expertise on certain projects, helping with presentations and bringing other funders on board.
- **What funders need to remember**
Funders must remember that this is about Māori aspirations, not our aspirations and process. It is defined by what the community thinks is good. Privileging their voice, their knowledge and frameworks.

- **What funders need to be conscious of**
One of the challenges as big funders is knowing that you could unconsciously undermine iwi self-determination due to funders' needs for process requirements, seeing progress and quick wins. Our experience is that the history of the country is always in the room. We must work consciously to not colonise the process, and to consciously decolonise.

Managing risk when impact investing

At the Philanthropy Summit 2021, we held a workshop called **Impact investment in action: Insights from the field in Aotearoa**, based on research commissioned by PNZ and undertaken by The Connective. The research explores partnerships and collaborations, capacity building and understanding impact in four early impact investments in Aotearoa.



Terri Eggleton

This workshop was very popular and was quickly followed up by an unconference session on managing risk in impact investments, led by BayTrust's Impact Investment and Partnership Manager, Terri Eggleton. Terri sat down with PNZ to delve further into this topic.

Why is impact investing important?

I absolutely think that impact investment is going to be one of the big answers of this age. Philanthropists and grantmakers just can't have enough effect with our grants, especially in areas like housing. We have this huge opportunity to use our capital base to create additional impact.

How has BayTrust approached impact investing?

After the global financial crisis, our granting budget was small, around \$2m going ahead for five years. We had to find other ways to create impact in the community above and beyond granting.

Since then, we have systematically developed our policies, our practices, taken advice from a number of institutions and consulted widely on best practice. We've brought our trustees on that journey, because this is critical. The other part is making it known to the community that we are open to impact investing rather than just granting.

We've gradually increased our target allocation to impact investment. As we've got it near the level of 5% of our total portfolio, we've upped the target to 10%. As we'll get near to 10%, I think we'll go up again.

Can you tell us how you've built your impact investment portfolio at BayTrust?

For the impact investment portion of the portfolio, we assess three parameters:

1. The likely impact
2. The risk
3. The return.

We score each of these and then manage those three parameters. When we look at an individual investment, we score it individually and then we put that investment into the

portfolio to see what the effect is on the portfolio overall. An individual investment might have a higher score for risk, but it is the overall effect on the portfolio that we are interested in.

We based our portfolio management practice on the guide from J.P. Morgan, 'A Portfolio Approach to Impact Investment'.¹ It's an excellent paper that is easy to read and offers sound advice on the different types of risk.

How does working with other funders or collaborating with other funders reduce risk?

We've taken the philosophy that the more investors in a deal, the better. That in effect reduces our risk, because if it were to make a loss, we wouldn't take all of the loss. Also, I think as part of the due diligence process the more entities that are involved, the more approaches you get. Someone will come at the investments from a different angle and make you think about a different risk. Once you identify the different risks, you can be aware of them, manage them and know what the trigger points are.

How do you decide on a percentage of a portfolio to dedicate to impact investing?

We started with 5% in discussion with the advisors to our mainstream investment portfolio. With asset class allocations, if you say 5%, you can go from about 0% – 10% and still be within the acceptable range. Because you won't be making a whole lot of investments straight away, starting with a low target enables you to at least feel that you are making progress towards your first limit of 5%. Once you get there and you've got more practice you can start doing more. If you start at 20%, you'll be looking for a huge amount of investments and just wanting to get assets in the portfolio because that's what your policy says. Refining your processes and your practices as you go along, getting more experience and getting more access to better deals is a better approach and has worked for us. As you move through your journey, I think increasing your allocation to impact investments will naturally happen.

Any other tips?

As a general comment, I have observed that trustees have sometimes found making impact investing decisions harder than giving the money away. When it's an investment and they expect that they will get the money back, they become more cautious about the decision! It's different to granting money as the due diligence is much higher, looking at a lot of different factors. It's great if you can do the due diligence with some other partners to share that risk and get everybody's opinion on it. It's also good to develop robust systems and practices to provide trustees with comfort that proper due diligence has been undertaken and the portfolio is well managed.

Refining your processes and your practices as you go along, getting more experience and getting more access to better deals is a better approach and has worked for us.

How should organisations go about due diligence for impact investing?

Many potential investors will say they don't have the experience to do the due diligence on an impact investment, but this can be overcome. There's two sides to due diligence for an impact investment. There's the financial/business side and then there's the impact side. You can certainly find someone who can do the financial side, but finding someone to assess the impact side can be harder, although there a number of agencies developing into this space. But we as grantmakers are in a good position to assess the likely impact of an investment due to our granting background, and there are processes and formats utilised globally that can help with this. If you can't find someone who can do both "sides", I think it's worth understanding that as a grantor, you do have some experience in assessing impact. If you don't have the experience to do due diligence exercises on investments internally, then you can get external advisors, buy the experience in, and develop your practices and experiences from there. Often, if you are investing alongside other people, you can get joint due diligence done, which is a good idea because then you all have access to the same information and save costs. It also depends on the size of the investment as to the scale of the due diligence exercise. For example, we have a level of over \$1m invested, which requires external due diligence oversight, and depending on the nature of the investment we have a number of parties we go to for assistance.

I absolutely think that impact investment is going to be one of the big answers of this age. Philanthropists and grantmakers just can't have enough effect with our grants, especially in areas like housing.

¹ <https://bit.ly/3xk7eUb>

Check them out here:
www.impactinvestingnetwork.nz

Philanthropy Summit 2021 – a snapshot of your experience

The Philanthropy Summit 2021 was held from 18–20 May. Its content was delivered online, with viewing parties held on the first day. The overall theme was *Amplifying community aspirations – Te whakarāhinga wawata ā-hapori*.

The themes for each day were:

Day one

Amplifying impact – Te whakarāhinga pānga

Day two

Reimagining communities – Te whai whakaaro anō ki ngā hapori

Day three

Aspiring together – Te wawata ngātahi

Our key objectives were:

We wanted to give attendees practical tools, help them learn best practice, and explore brave new ideas to support impactful and long-term positive change.

We had a dynamic mix of speakers discussing a wide range of topics at the workshops and keynote sessions. Here's what you thought of the experience.

How would you rate your experience of the Philanthropy Summit 2021 as a whole?

89% said they were extremely satisfied, very satisfied or somewhat satisfied with the event as a whole. The survey responses highlighted that people's satisfaction was impacted by the delivery of an online summit rather than an in-person one.

“Great key speakers and workshops, kaupapa were relevant to what's on top in the social, political, environmental and educational arenas, impactful mahi.”

“Inspiring range of speakers, Māori-focussed and change-focussed.”

“Well – I'm listening to the closing keynote, and I have to say, it's going out with a bang. Gemma and Ezekiel are awesome. Really good use of technology. Great workshop topics. An opportunity to meet face-to-face as well as log on online. Again, the content is urging philanthropy forward. Well done to the team!”

Some comments about the keynotes:

“Jamie Tuuta, Gemma Major and Ezekiel Tamaana Raui were relevant and brilliant. Great to have those voices in the room – strong Māori leadership, and the voices of incredibly onto it, strategic and kind young people seeding change.”

“Jamie Tuuta was a particular highlight as was Rangimarie Hunia. I also enjoyed the voice of youth to close which was an inspiring choice. Gemma and Ezekiel were uplifting. Good consistency across all the speakers.”

“Excellent insights – real leadership in the space, which is great to see from within NZ. Such depth of knowledge to share.”

“Katherine Zavala was authentic, personal, interesting.”

This year, we had the pleasure of having Michele A'Court as host:

“Superb job as MC – very thoughtful questions and helpful summaries. Little bit of humour but not too much. She was obviously well prepared for the subject matter and conveyed her enthusiasm and appreciation for the individual topics and speakers.”

Our objectives for the summit included inspiring people and giving them the tools and insight to take action. We'll be surveying attendees in six months'

time to follow up what activity has resulted, but initial survey feedback shows inspiration and action. Here's a snapshot:

Funders walk the talk: Rachel Brown, Lisa Hickling, Tania Pouwhare

“Will definitely be taking notes to my Trust and making recommendations around procurement as well as the measurement and offsetting conversations. Maybe getting Lisa to talk to our Trust at a meeting!”

Collaborative funding for rainbow organisations: Eileen Kelly, Joey Macdonald, Duncan Matthews, Helen Clarke, Jelly O'Shea, Jennifer Shields

“Educating funders when they are establishing their criteria, being deliberate with language. Kia ora tātou! Really appreciate your awahi in answering. Awesome discussion. :)”

Ki te Hoe – Tools for boards and CEs: Kate Frykberg, Haimona Waititi

“My planned actions are to share the Ki te Hoe frame with our Pou Ārahi and advocate for applying these steps to our own organisational journey.”

Collaborating for education equity: Ellie Sutton, Richard Catherall, Lorraine Mentz, Liz Gibbs, Ayla Hoeta

“Excellent insights – real leadership in the space, which is great to see from within NZ. Such depth of knowledge to share.”

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Philanthropy Summit 2021
Amplifying community aspirations
Te whakarāhinga wawata ā-hapori

“Wow I can only express how the summit opened my eyes – stand up and voice your opinion.”

Funding Māori aspirations:
Whetū Campbell, John McCarthy,
Jodi Qereqeretabua

“I will be going away from today to have a chat with the team about how we can get involved and support. I’m really conscious that collaborating with existing mahi rather than starting new is going to be much more valuable.”

Aspiration through the lens of accessibility: Rose Marie Kirkup, Adrienne Thompson, Paula Tesoriero, Lusi Faiva

“The accessibility session was really insightful and moving.”

Readying our sector for major events:
Lori Luke, Kate Sclater, Jamie Ruwhiu

“The guidelines will be excellent for us to share. A lot of my time is spent assisting applicants on how to tailor their applications to the kaupapa of the fund! Ngā mihi nui kia koutou mo to awahi.”

“This was inspiring and gave some really practical and manageable directions in addressing the challenge of combining funding with advocacy.”

“It was such a positive and uplifting experience.”

Sustainable planet: Abbie Reynolds, Mike Smith, Jessica Panegyres

“The Sustainable planet talk was downright scary but outstandingly presented. It gave us a real call to action which will stay with me. Terrific work!”

Philanthropists and grantmakers – agents for advocacy: Seumas Fantham, Robyn Scott, Raf Manji

“This was inspiring and gave some really practical and manageable directions in addressing the challenge of combining funding with advocacy.”

When asked if you will take action as a result of the summit experience, 81% either completely agreed, mostly agreed or slightly agreed.

“Wow I can only express how the summit opened my eyes – stand up and voice your opinion.”

“Reinforced the importance of both the mahi in which I am engaged and the way and how of its delivery.”

“It was such a positive and uplifting experience.”

“Will connect with others and also some of the sovereignty points around data are very pertinent to us and need exploring.”

Summit attendees can watch recordings of keynotes and workshops. If you weren’t registered for the summit and would like to view any recordings, please get in touch at info@philanthropy.org.nz

Better supporting Pacific aspirations

Better supporting Pacific aspirations celebrated Pacific potential. This workshop identified the levers to support the aspirations of Pasifika.

Attendees discussed building greater understanding of the communities’ cultures, values, experiences, and concerns. They delved into how they can gain support, and involvement from Pacific community leaders and explore pathways to co-design initiatives, work collaboratively and deliver innovative solutions.

The panel included: Sita Selupe (Principal, Rise Up Academy), Tanya Wendt Samu (Senior Lecturer, University of Auckland Faculty of Education and Social Work), Renee Mose (Covid-19 Response Welfare and Cultural Liaison, Auckland Regional Public Health Service), Kramer Hoeflich (Team Leader and Disability Information Advisory Service Coordinator, Vaka Tautua) and Eve Jolly (Facilitator, Foundation North).

Here are the highlights.

“Our aspirations are that inequities are eliminated so that our people can thrive in New Zealand.”

Renee Mose.

“Pacific communities don’t care what you know until they know that you care. Take time to build relationships that are win-win. Our success is mutual.”

Sita Selupe.

Ask us what we want, how we want to be approached, listen to us, and allow us to run free and create something new. Don’t be afraid to engage with different communities, listen to what we have to say, don’t be afraid to tweak it.”

Kramer Hoeflich.

“Support visionaries and leaders to grow, to be savvy and strategic, and resource them to step into the next level of development.”

Tanya Wendt Samu.

- Pacific communities want to design and lead their own solutions.
- Services for Pacific people need to reflect Pacific ways, Pacific values of collectivism, our cultures and languages. Work with, not without.
- Initiatives need to be driven by Pacific leaders, and always be working to reduce inequities around health, education, income; those areas where our Pacific people are struggling. Pacific wellbeing is nested in aiga/family wellbeing.
- Pacific communities prosper when there is strong leadership – harnessing the leadership in Pacific communities is powerful. Leadership in Pacific communities looks like service and influence.
- Remove barriers by asking culturally appropriate questions, keeping requirements minimal and clear, supporting groups through the funding process, and providing Pacific language translations. Supply good food – food breaks down the engagement barrier. Food represents love, support and respect.
- Create a safe space to come together, to talanoa, to share what it means to do things in a Pacific way, be ourselves and represent our cultures. When engaging with Pacific communities, make it meaningful, allow quality time to listen, share stories and be involved in the whole process from start to end, and when things are reviewed. Follow through on your stated intentions and actions.



Thank you to the Centre for Social Impact for putting together this article.

- It can’t be underestimated how important it is to build the capacity of Pacific people to co-construct and lead. This is not a paternalistic model. Philanthropic support provides freedom to have a vision, aspire and move things along as there aren’t the constraints of government.

When working with Pacific peoples, take on the four ‘Es’:

Engage

Connect, have a dialogue, share power, work to be equal partners. Weather the storms of community organisations. Ask what people need.

Establish

Build high trust relationships, still with accountability. Ask “What can we help with?” Socialise other relationships, connect people for influence and support.

Equip

Set organisations up to succeed.

Empower

Support leadership, self-determination and Pacific-led approaches. Learn from these communities.

“More authentic partnerships can develop, we need to make time, co-design, capacity build and learn together, with funders prepared to learn and grow. It’s about the va (relational space). Support Pacific-led, reinforcing Pacific values, identities, affirm Pacific people for who they are. Negotiate challenges and address systemic and structural barriers to Pacific wellbeing.”

A breakout session reflection

Movements and the role of solidarity in system change



Katherine Zavala

U.S. based Katherine Zavala from Thousand Currents was a keynote speaker at the summit. Katherine talked about the role of social movements as driving forces to support social and systemic change. The content for this article has been taken from her presentation.

Common characteristics of movements

Katherine's experience witnessing multiple social movements around the world has highlighted the following common key characteristics of a movement:

- They have an organising structure, usually flexible and decentralised; it's a structure that is led by people at the grassroots level.
- Movements build power from below. They foster people to build agency and collective leadership.
- Movements have concrete demands which are oriented towards systemic change.
- Movements have a collective identity. For example, the Movement of People Affected by Dams, from Brazil, is a movement of members who share identity from being impacted by dams, whether it's been through displacement, disruption or destruction of life.
- Movements carry out multiple sets of actions or activities. These can include political education, agroecology techniques for building food systems, mobilising protests or conducting a radio campaign.
- Movements continually undertake systemic analysis. The failures of our current system are not new and have been well known and studied.

“Movements build power from below. They foster people to build agency and collective leadership.”

- Movements have clear strategies. These can be:
 - At multiple levels, locally, nationally, and even globally
 - Resisting against state-sanctioned violence or extractive industries
 - Reforming by influencing policies and legislation
 - Transforming, which is about building that alternative vision, or getting ready for the transition of systemic change.
- Leadership is collective. As it has the characteristic of building power from below, the strength of the collective is important in that power building.
- Movements have a clear worldview and are building a path towards a clear vision (and this vision usually represents the alternative).
- Movements work within a movement ecosystem.

Lessons learned and steps towards funding movements

As Thousand Currents began to fund movements their lessons included:

- Understand that movements historically have emerged and done their work without funders.
- Understand that movements don't act alone. They are usually working within ecosystems, and those grassroots actors are as important to support as the movements themselves.
- Always respect the autonomy and the self-determination struggles the movements are leading and fighting for.
- When engaging with movements our primary responsibility and identity is as a funder, even if in other spaces we take pride in identifying ourselves as activists. This clarity of boundaries helps funders to understand our role, which is essentially to move the money.

- The most effective way to support movements is through long-term and unrestricted support. Their commitment to change is long-term and the path to getting there is unpredictable and non-linear.

Thousand Currents took the following steps. They:

- Started with some study of movements, but quickly realised that the only way to really learn was through practice.
- Included grant support towards social movements. This was a shift for them, as at the time support went only to community-based organisations.
- Asked peer funders who had more experience working with social movements to recommend movement groups that they could support and learn from.
- Updated their theory of change. They clarified their vision towards systemic change, and understood who were the driving forces leading the path towards long-lasting systemic change, and the enabling conditions that allow them to be successful.
- Updated their grantmaking criteria. They expanded their flexibility towards movements, grassroots organising groups and the range of grassroots actors that exist in the movement ecosystems.
- Renewed their commitment to continual learning and assessing ways to improve grantmaking practices.
- Explicitly started to name solidarity as the basis for their practices.

The principles of solidarity became key

Katherine shared the following solidarity principles:

- It is the idea that we are interconnected as a global community.
- We share the same struggles and hopes, in fact, the slogan of La Via Campesina is “Globalising hope, globalising the struggle.”
- Solidarity is the idea that we see each other, even if we're not physically in the same room. That I can feel and empathise with your pain across the distance. To say that we are not alone. The Ubuntu philosophy that is commonly found across the African continent expresses solidarity in “I am because we are”.
- It values relationship building, showing up and all that it means to practice that:
 - Practices that centre interdependence, wellbeing and love
 - Love for our ecosystem of life
 - Practices that push us towards courage, to not be silent or complacent.
- Eduardo Galeano, a well-known journalist, writer and poet from Uruguay, had a famous expression:

“I don't believe in charity. I believe in solidarity. Charity is so vertical. It goes from the top to the bottom. Solidarity is horizontal. It respects the other person. I have a lot to learn from other people.”

Philanthropic practices that can lead to transformative change

Katherine talked about the importance of shifting from charity to solidarity.

“If we think about charity being vertical, it provokes the question of who is making decisions around grantmaking practices. Is it coming from the top? From the trustees, the programme officers, those who hold the money?”

“When thinking about solidarity as horizontal, what are the types of relationships that you're entering with your grantee? Is it a horizontal partnership? Or is it a one-way transactional relationship?”

Katherine suggested implementing the following practices as a way to embed solidarity principles in a partnership:

- A practice of deep listening.
- A practice of relationship building, building and strengthening trust as an ongoing commitment.
- A practice of accountability, being clear who you're accountable to, and what your role and responsibility is.
- A practice of being challenged. Be prepared to be eyes wide open with the system we're currently living under. Be willing to get uncomfortable in this process.
- A practice of exploring what more one can do as a funder, particularly in this moment, when the call is to be bolder and braver.

Katherine said that following the lead of their grantee partners continually helps them learn what it means to show up in solidarity. She left the summit attendees with a question: whether they were prepared to “commit to solidarity and show up in a way that we never imagined for ourselves”.



Sustainable planet

CEO of Predator Free 2050 Ltd Abbie Reynolds was a speaker at the workshop **Sustainable planet** during the Philanthropy Summit 2021. The workshop offered inspiration and advice on maximising your funding into climate change alleviation. Here are some of the main takeaways for grantmakers and philanthropic funders.



Abbie Reynolds

- More floods and droughts
- More wildfires
- Rain and snow patterns changing.
- Extreme heat
- Ocean coral bleaching
- Ocean loss of oxygen
- Ocean acidification
- Displacement of people
- Food insecurity
- Reduced food productivity
- Malnutrition
- Increased disease spread
- Reduced fresh water
- Mental health impacts
- Increased species extinctions.

Its goal is to **limit global warming** to well below 2, **preferably to 1.5 degrees Celsius**². The below shows how critical it is to limit global warming to 1.5 degrees.

2 degrees vs 1.5 degrees:

- The number of insects, plants and animals exposed to habitat loss will be doubled at 2 degrees compared to those exposed to habitat loss at 1.5 degrees.
- Less than 1% of coral, if any, will survive at 2 degrees of warming.
- Coastal flooding will be far worse at 2 degrees of warming.
- Marine fisheries will lose double the amount of stock if we go over 1.5 degrees.
- Sea ice-free Arctic summers will be ten times more common.
- Far greater swathes of crops will fail.
- Vector-borne diseases like malaria and dengue fever will spread more easily and will also spread further.
- Some 420 million more people will be exposed to heatwaves than at 1.5 degrees.

What have we agreed to do?

In 2016, New Zealand signed the Paris Agreement. It is a **legally binding international treaty on climate change**.

² <https://bit.ly/3AemNyD>

What is climate change?

- Gases released from industry and agriculture trap solar energy and increase the temperature.
- Carbon dioxide, methane and nitrous oxide are greenhouse gases and have all increased as a result of human activity.
- Most man-made emissions of carbon dioxide come from burning fossil fuels.

Why is it urgent?

In Aotearoa New Zealand we will see:

- Less snow and ice
- Stronger storms
- Higher wind events
- Heatwaves
- Rising sea levels and oceans warming; this will have an acidifying impact on shellfish and fish

What does it mean?

To be on track we need to decarbonise our economy at a rapid pace. This requires a significant transformation in three broad areas: reducing emissions, adapting to a warmer climate and moving towards a lower carbon lifestyle. Examples of the kinds of changes include:

MITIGATION <i>Reducing emissions</i>	ADAPTATION <i>Adapting to a warmer climate</i>	TRANSITION <i>Moving towards a lower carbon life</i>
<ul style="list-style-type: none"> • Flying less • Driving less • Working from home • Removing fossil fuel • Destocking farms • Planting more trees • Increasing renewable energy 	<ul style="list-style-type: none"> • Managed retreat • Building sea walls • Moving roads and other infrastructure • Re-wetting wetlands • Reducing fishing • Biodiversity corridors 	<ul style="list-style-type: none"> • Increased insurance costs • Loss of value in fossil fuel assets • Loss of value of houses in coastal areas • Impact on investment funds • Increased costs of petrol, etc due to cost of carbon

What might it mean for philanthropy and grantmaking?

We can extrapolate what these changes might mean for philanthropy and grantmaking. These include:

FOR THE FINANCIALS	FOR OPERATIONS	FOR GRANTEES
<ul style="list-style-type: none"> • Losses if exposed to fossil fuel investments • Potential loss of value of physical assets • Potential for strong performance from low carbon opportunities • Exposure to agriculture 	<ul style="list-style-type: none"> • Costs may increase • Flights may increase • More home working • Move from internal combustion engines to EVs to e-bikes • Culture change • Climate grief • Waste 	<ul style="list-style-type: none"> • Climate change is a threat multiplier • Major disrupter of technology • The transition needs to be just or inequities will become entrenched • Has major impact for biodiversity • Māori significantly affected

A study of Philanthropy New Zealand's Environmental Funders' Network found only 4% of funding goes into nature.³ The effects of climate change mean we need to give greater consideration to where and who we fund. We have to think deeply and make decisions about who has to pay for the costs of climate change on society. We're going to have to undergo massive systems change and this is an opportunity to rebuild society more equitably.

Some places to start:

- Learn by doing – talk to Toitū Envirocare to calculate your own carbon footprint and offset it.
- The Sustainable Business Network has tools and resources online and does a lot of work in systems change. For example, the Climate Action Toolbox is free and online.
- Move to a climate-conscious and circular economy – get rid of waste.
- Genuinely work with communities to regenerate nature.
- Do some diagnostics – measure impact to see what's working well and what's not working well.
- Pull funders together and look at solutions, support each other to build capability.
- Manage your risk – talk to your fund manager to make sure you aren't exposed to fossil fuel investments.
- Identify where to invest – talk to your local iwi and hapū to see what they are doing and what they need.
- Help the causes you support – start the conversation about what climate change might mean for their organisation and the cause/s they champion.

³ <https://adobe.ly/2UINLxY>

Growing effective giving



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We provide training, share best practice, data and research, and connect our members to enable collaboration.

We offer guidance for anyone with an interest in giving to make the world a better place.

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