



J R McKenzie Trust: Intersectionality and building capacity for systems change

The J R McKenzie Trust kaupapa

The J R McKenzie Trust is a philanthropic family trust that has been grantmaking in Aotearoa New Zealand since 1940. The trust was established in perpetuity by J R McKenzie, founder of the McKenzies department stores, to improve the quality of life of New Zealanders. His legacy was continued through the visionary work of his son, Roy McKenzie, who took over as Chair in 1955, and subsequently third and fourth generation McKenzies. Today, the trust's board is comprised of family members, Rotarians, and other appointees. Its funding is made possible by dividends received each year from Rangatira Investments, a company established by Sir J R McKenzie in 1937, that pioneered private investment in Aotearoa New Zealand.

The J R McKenzie Trust has a long history of funding strategically to address social challenges, and funding groups and issues that often struggle to get funding elsewhere. In 2020, the trust launched its current ten-year strategy Te Anga Rautaki, with a vision for a “socially just and inclusive Aotearoa New Zealand”. The overall priority is “advancing equity” by addressing the underlying causes of inequity and exclusion. The trust is guided by its values, and focuses on supporting its priority communities: children, young people and whānau; Māori;

Pacific Peoples; and communities that experience exclusion.

In its strategy, the J R McKenzie Trust outlines three primary change strategies that it seeks to activate through funding and other non-financial support: strengthening collaboration and supporting collective action; supporting community innovation, voice, and leadership; and growing capacity to progress system-focused solutions.

The change strategies guide the funding approach, which has two key mechanisms – Te Pae Tata sees the trust call for proposals, while Te Pae Tawhiti offers the space to intentionally navigate towards the trust's vision through proactive partnership building with ngā kaikōkiri that have aligned visions, values, and outcomes. Executive Director, Robyn Scott, explains, “working and learning together in aligned partnership alongside different kaikōkiri to activate Te Anga Rautaki, makes goals of equity and inclusion easier for all to achieve”.

The J R McKenzie Trust's Intersectionality Project is an example of Te Pae Tawhiti. This sees the trust working proactively with a cohort of organisations that are each working on systems change in relation to belonging and inclusion, across a range of spaces including rangatahi, rainbow communities, and migrant/refugee background communities.

Whakapapa – the journey of J R McKenzie Trust

The J R McKenzie Trust has a history of bringing together and supporting cohorts of ngā kaikōkiri working on similar issues or in similar ways. The ten-year Connecting Education and Communities programme is a key example, where the trust worked with ngā kaikōkiri across Aotearoa New Zealand that were each supporting communities to build whānau engagement in education, to achieve better educational outcomes for disadvantaged children.

The new J R McKenzie Trust strategy, Te Anga Rautaki, provided significant scope for working proactively with communities to support collaboration and collective action. Trust collaborator and former staff member, Eileen Kelly, shared that the Intersectionality Project was born from a desire to implement learning from previous cohort approaches. The intention was to create “a community of practice of organisations working in different ways, with different communities, on similar, inter-connected issues around inclusion”.

The concept was to focus more deeply on supporting organisations working on systems change, and to consider the intersectionality of both the communities experiencing exclusion and the drivers of exclusion. Creating a community of practice was considered to be a lever for sharing ideas, practice, and learning to strengthen understanding of systems change

conditions that could then advance the respective missions of each cohort member involved. In summary, there was a clear focus on trying to build collaborative capacity for systems change.

Each cohort member was identified as being a ‘hub’ within their respective sector or region i.e., to have wide reach and influence into an ecosystem of stakeholders engaged with the issues that they are trying to impact. Eileen reflects that “each of them have that influence in their communities; they reach out like an octopus and actively build the capacity of others”. Cohort members include:

- **Te Ngākau Kahukura** – a national initiative focused on making communities, environments, and systems more safe and inclusive for rainbow people across Aotearoa New Zealand. Key strategies include advocacy, creating evidence-based resources, and developing and embedding best practice for agencies, health and social services, and educators.
- **Belong Aotearoa** – an Auckland-based trust focusing on driving transformational change to improve inclusion, belonging, and wellbeing to refugee-background and migrant communities. Key strategies include advocacy campaigns that centre the voices of communities, nurturing and enabling refugee-background and migrant changemakers, and

developing alternative programmes/ services that address exclusion in spaces such as education and employment.

- **Te Whāriki** – an initiative of the new Leadership Lab Foundation run by associates of Leadership Lab that focuses on rangatahi leadership development to build the next generation of community leaders activating systems change. An extension of LinC Puāwai, Te Whāriki is actively rooted in a kaupapa Māori framework and is deliberate in its consideration of equity, inclusion, and intersectionality. LinC Puāwai is featured as a companion story as part of the The Philanthropic Landscape series.

How The Philanthropic Landscape key practices present in the work of J R McKenzie Trust

Relationships and trust are key foundational practices that supported J R McKenzie to develop its model for the intersectionality cohort. “We approached kaikōkiri that we already knew, where we saw they were already thinking about intersectionality and were focused on systems change; and where we knew we could build deeper relationships. The trust model was key,” Eileen says.

The J R McKenzie Trust was interested in a power sharing approach when developing this cohort. This began by deepening relationships with each member, scoping and co-creating how a cohort approach

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could work for them. The trust also worked with ngā kaikōkiri as a group to understand what type of financial and non-financial support it could best offer, and how funding could be structured in ways that would enable the members’ respective and collective missions. This meant having some challenging conversations with ngā kaikōkiri. In some cases, the result of this is that the trust has moved away from funding specific costs or deliverables, to providing broad core funding against a shared theory of change.

While the project is still in its infancy, the sense of power sharing within the cohort has already grown – to the extent that the trust clearly sees itself as a member of the community of practice, rather than just the funder. “J R McKenzie Trust is the fourth member of the rōpu [...] We are alongside the other kaikōkiri and the practices we develop are shared. We are forming partnerships that support impact and growth, and are encouraged to learn from each other,” Eileen reflects.

The cohort approach involves a collaboration with Point Research, which has, for example, supported Te Ngākau Kahukura and Belong Aotearoa with their developmental evaluation activities. Both are now using a reflective practice

tool to capture learning and impact generated from this way of working, in order to share high-level insights with community partners and the Trust.

A workshop led by Nadine Metzger from Point Research has enabled ngā kaikōkiri to develop the evaluation approach for phase two of the project, drawing on the Equitable Evaluation Framework (EEF) developed in the US, and applying it to an Aotearoa New Zealand context. The intention of EEF is to shift the evaluation paradigm to one with equity as the core, helping practitioners challenge cultural norms that promote preferences for a singular type of truth, knowing, and evidence, which often reinforces existing narratives for communities experiencing exclusion. This responded to the desires of ngā kaikōkiri for their work together to be grounded in values of inclusion that are meaningful for Māori; and acknowledges the importance of whānau, hapū, and iwi, as well as shifting the dial on racism and colonising norms.

Throughout this project, Eileen sees that there has been a huge shift in trust around the J R McKenzie Trust board table, where trustees are “realising we can work in this proactive, collaborative way; reducing conditionalities on funding and exploring all of the different ways that we can support ngā kaikōkiri”. Board reporting too has shifted, focusing on “how J R McKenzie is going with this work”, rather than focusing only on what is being delivered by the funded partners.

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The trust has resourced developmental evaluation support to understand the impact of this way of working as it unfolds. Evaluators have been paired with each group, and the trust is able to document cohort learning every few months. “For us, being the fourth partner, our evaluative focus is understanding what impact we are having in supporting our partners being able to do more and have more impact.”

For the kaikōkiri in the rōpū, Eileen believes the cohort approach is already showing positive impact. Members are starting to explore shared issue areas together – such as the ways that housing exclusion is intersecting with their respective communities of interest. The J R McKenzie Trust is facilitating this through resourcing things like travel and convening hui. Eileen believes that as time goes on, “there will be more and more of that cross-pollination” as cohort members see opportunities to learn from one another about what supports systems change. For the trust, the focus is on continuing to understand that it is innately part of the systems it is trying to influence. “Understanding that we are kaikōkiri is the key to success,” Eileen reflects.