

The Philanthropic Landscape

VOLUME II:

*Shifting Culture and Power through
Mana-Enhancing Partnerships*



JR McKenzie
Trust

**The Philanthropic Landscape Volume II:
Shifting Culture and Power through Mana-Enhancing Partnerships**

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J R McKenzie Trust and Centre for Social Impact

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Foreword

Tēna koutou katoa

Kia tau ngā manaakitanga a te mea ngāro ki runga ki tēnā, ki tēnā o tātou.

The J R McKenzie Trust's philanthropic philosophies were formed and driven by Sir John and Sir Roy McKenzie and further evolved by successive generations of their family. One characteristic shared by Sir John and Sir Roy was a willingness to explore and embrace change in order to pioneer a new and better way forward. This commitment to pushing boundaries has always encouraged the Trust to look at the way we view, shape, and practise our mahi, so that we are purposeful in responding to the ever-changing philanthropic environment.

In July 2019, the J R McKenzie Trust commissioned the Centre for Social Impact (CSI) to undertake a review into contemporary philanthropic practices, to inform the Trust's ten-year strategy refresh. The goal was to gain greater knowledge and insight into the philanthropic landscape in Aotearoa New Zealand and worldwide. Understanding effective and emerging practice was an important compass as we set out to refine the Trust's ongoing strategic direction.

The *Philanthropic Landscape: A Review of Trends and Contemporary Practices* identified five key characteristics of contemporary philanthropy – a focus on equity, power sharing, systems change, decolonising practice, and adaptability and learning. These themes weave across all aspects of philanthropic practice, including strategy, models of grantmaking, relationships with community, and approaches to understanding impact.

Since publication, *The Philanthropic Landscape: A Review of Trends and Contemporary Practices* has become a valued reference for philanthropic organisations in Aotearoa New Zealand and beyond, informing the values, practices, and strategies of trusts and foundations seeking to achieve positive impact in their respective communities. As anticipated, it also supported the development of the Trust's ten-year strategy, Te Anga Rautaki, which is guiding our mahi until 2030.

In 2023, the J R McKenzie Trust and CSI have partnered to develop this companion volume – *The Philanthropic Landscape Volume II: Shifting Culture and Power through Mana-Enhancing Partnerships*. It centres on the 'how' of impactful philanthropy; specifically focusing on the characteristics of mana-enhancing partnerships. Within the context of impactful giving, mana-enhancing relationships are those where funder and ngā kaikōkiri (communities, funded groups, grantees) enact a culture of reciprocity – working together in service of a kaupapa or shared purpose, in ways that ensure all parties have agency and voice, feel understood, and are trusted, respected, and valued for what they bring into the relationship. The partnership uplifts everyone.

Volume II examines the skills, mindsets, and ‘ways of being’ that philanthropy must adopt to give effect to the themes identified in Volume I. These themes include meaningfully sharing power, decolonizing practice and partnering with Indigenous communities, embedding learning, advancing equity, and driving systems change. Through a number of inspiring examples of good funding practice including interviews with ngā kaikōkiri and funders, this report explores experiences, synergies, shared learnings, and aspirations for mana-enhancing funding partnerships. The aim of this work is to build on our sector’s body of thought, and to inspire and influence mana-enhancing philanthropy in Aotearoa New Zealand and beyond.

The J R McKenzie Trust was formed over 80 years ago to be courageous in its mahi and that means being open and intuitive, boldly trying different things, always striving to show aroha and manaakitanga to our partners, and adopting a strengths-based, community-centred approach. Our strategic values reflect this approach perfectly: Mana Taurite | Equity; Manawanui | Courage; Whakawhanaunga | Relationships; Manaaki | Care for Others; Whakamana Tangata | Respect; and Pono me te Tika | Integrity.

Forging a new course takes commitment and a belief that the destination is worth any uncertainties the journey might hold. The desire to advance equity through transformational change and system focused solutions is at the heart of what we do, and by embracing mana-enhancing philanthropy, we are one step closer to achieving that ambition.

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

Ngā mihi nui ki a koutou katoa.



Robyn Scott

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

Executive Director
J R McKenzie Trust

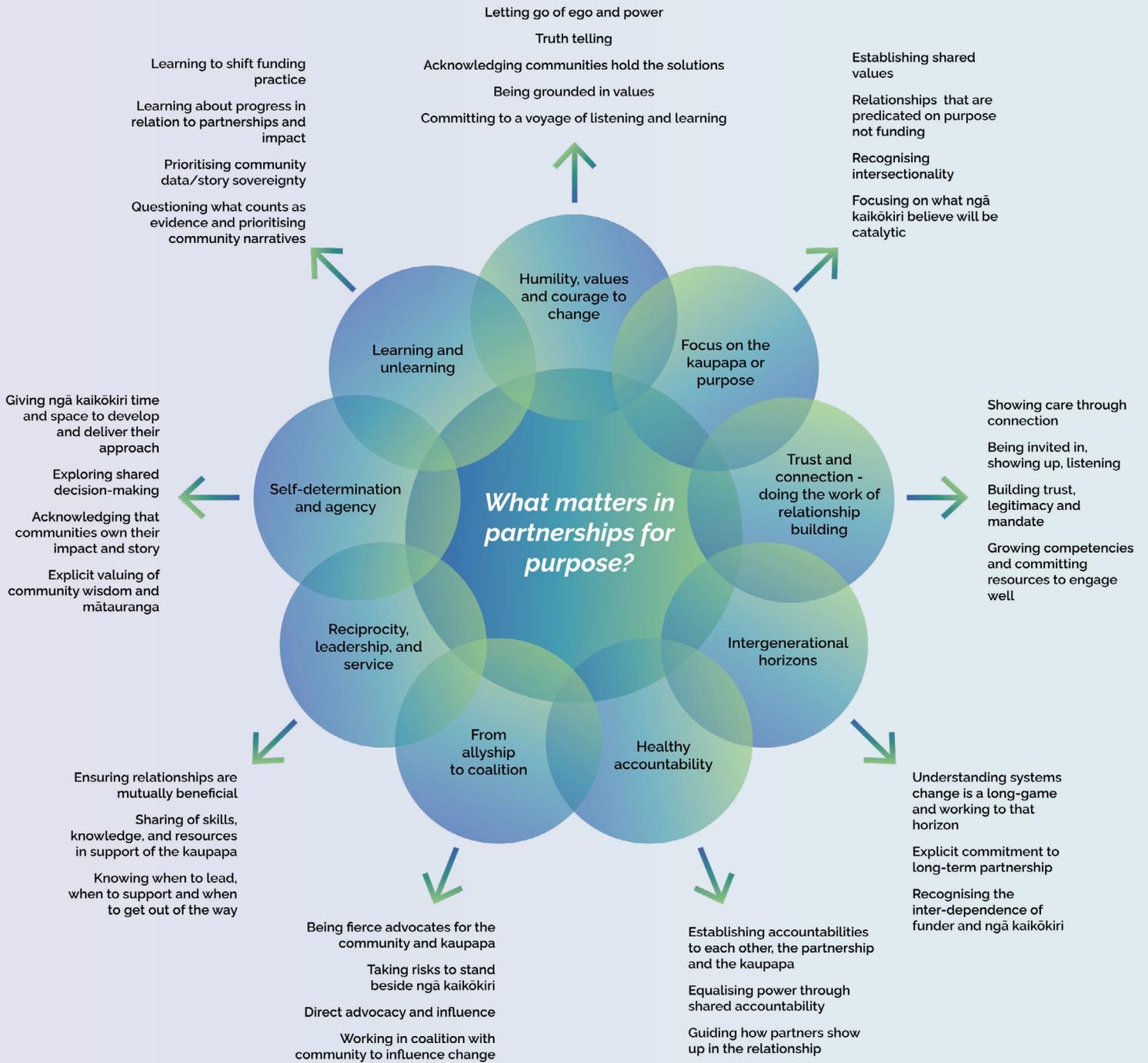


Dr Chelsea Grootveld (Ngāitai, Ngāti Porou,
Whānau-ā-Apanui, Whakatōhea and Te Arawa)

A blue ink signature that reads "Chelsea".

Chair
J R McKenzie Trust

Summary



Contributors

Here tangata, here whenua, ka tū te pō, ka tū te ao.

I te whakaiti, ka tuku tēnei mihi ki a koutou katoa e kawe nei, e mahi nei i ngā mātāpono o te Whakawhanaunga, te Tāututuutu, te Toha Tukuruā, ā, ko te whāriki o ngā mea katoa – ko te Aroha.

Tēnā koutou katoa.

We give deep appreciation to the participating people and organisations for trusting us with their stories and sharing their deep wisdom as a gift to inspire others.

Philanthropic funders

Dusseldorp Forum (Teya Dusseldorp and Lindie Clark)

Eastern and Central Community Trust (Kristal Leach, Rose Artemiev, Piripi Ropitini, Emma Haxton)

Fay Fuller Foundation (Niall Fay and Carolyn Curtis)

Foundation North (Rosie Nathan, Kim Collins and Nicola Brehaut)

J R McKenzie Trust (Eileen Kelly)

Leadership Lab (Chris Jansen)

Peter McKenzie Project (Aiolupotea Lili Tuioti)

Tapuwae Roa (Te Pūoho Kātene)

Toi Foundation (Maria Ramsay and Chris Ussher)

Trust Waikato (Dennis Turton)

Wayne Francis Charitable Trust (Jenn Chowaniec)

Further information about each organisation can be found in their story from page 27.

Contributors

Ngā kaikōkiri

Te Whānau o Waipareira Trust (Jacqui Harema)

Te Whānau o Waipareira Trust was established over 30 years ago in West Auckland, and provides free services and support for whānau of all ages across spaces including health, legal, housing and education. The Trust is also a Whānau Ora commissioning agency contracted to fund and support initiatives that deliver Whānau Ora outcomes. They act as brokers in matching the needs and aspirations of whānau with funding and support that will help them achieve their aspirations.

Te Whānau o Waipareira Trust has a five year partnership with Tapuwae Roa, which invests in Te Kete Aronui, a targeted literacy and numeracy initiative designed to accelerate the learning and achievement of ākongā Māori (learners). The programme pairs existing teaching tools with a tikanga-centred, whānau ora approach, fostering a supportive classroom environment for Māori learners with wrap-around support for whānau. The support from Tapuwae Roa has also included the funding of a social return on investment study.

waipareira.com

Wesley Community Action (Lizzie Makalio)

Wesley Community Action was established in 1952 by Te Haahi Wēteriana (Methodist Church) to serve communities throughout the Wellington region, supporting people to create better lives for themselves and their whānau. Their work takes a strengths-based approach that is underpinned by the belief that “people are the experts in their own lives” and can be their own agents of change. Wesley offers a range of community- and whānau-driven projects and services.

This paper centres on a specific project that Lizzie Makalio and her son have created, which is supported by a partnership with the J R McKenzie Trust. Lizzie is deeply embedded in the community and with the support of the Trust is working with Mongrel Mob Motorcycle Club members and their whānau to enable access to learning and tools for whānau wellbeing. A key initiative is Whanafluence, where an online community of whānau from across different Club patches are supported to access and share tools, discuss moments of change, watch online workshops and learn from each other’s life experiences.

wesleyca.org.nz

Why ORA (Tanya Anaha and Danae Etches)

Why ORA is a not-for-profit community organisation established in 2010 and based in Taranaki. It works across the community to empower Māori career and employment aspirations, grow the Māori workforce and improve whānau income, so that whānau can flourish. This involves working with taiohi and whānau to identify their aspirations and turn them into meaningful career paths.

Why ORA have a long-term funding relationship with Toi Foundation. They are also part of a 'flotilla' or cohort of ngā kaikōkiri funded by the Peter McKenzie Project (PMP). PMP invests in their transformative plan to shift the way that the health and education systems work for Māori by facilitating and creating new pathways for rangatahi and whānau Māori into careers and changemaking roles in those systems.

whyora.co.nz

First Nations Philanthropic Funders Working Group (Warren Miller)

The First Nations Philanthropic Funders Working Group (FNPFWG) is a collective of six Aboriginal-controlled community health and wellbeing providers that was established to oversee the creation of a community-led model that could direct philanthropic funding to First Nations communities across South Australia. The FNPFWG is focused on creating pathways for First Nations people to access resources and shape how and in what ways they interact with philanthropy.

The FNPFWG has a partnership relationship with the Fay Fuller Foundation, which provides ongoing resourcing to develop the structure and governance model that oversees the distribution of funding from other investors, including the Paul Ramsay Foundation. As part of its relationship with the FNPFWG, Fay Fuller Foundation has seconded Warren Miller from his role with group member Yadu Health Aboriginal Corporation, to act as strategic advisor supporting the Foundation with its First Nations philanthropy.

fayfullerfoundation.com.au/first-nations-led-health-funding

The Philanthropic Landscape

A Summary of Key Trends from Volume I

Philanthropic practices are as diverse as the donors and institutions behind them. Despite this diversity, what is increasingly common is a move from traditional forms of charity, towards prioritisation of impact and a desire for ‘systems change’, shifting the underlying conditions that are holding a problem in place.

Volume I of *The Philanthropic Landscape: A Review of Trends and Contemporary Practices* identified five key practices characteristics of contemporary philanthropy – a focus on equity, power sharing, systems change, decolonising practice and adaptability and learning. These themes weave across all aspects of philanthropic practice, including strategy, models of grantmaking, relationships with community and approaches to understanding impact.

A copy of the full report of Volume I can be found at jrmckenzie.org.nz. The key themes are summarised below as key background information to the insights shared and discussed within this Volume II.

1. Equity

Equity has become a central tenet of philanthropy, with many trusts and foundations choosing to focus on the communities ‘doing it toughest’, to address entrenched disparity. In practical terms, this means identifying priority communities and committing proportionally more funding and effort into addressing equity issues. This requires a long-game approach to work on issues that are intergenerational. It also means making difficult decisions about divesting in some communities/sectors to free up resources for equity work.

Data and other evidence of need is often used by philanthropy to determine where issues of equity exist – who is most impacted and who or what issues need to be prioritised. Alongside this, philanthropy is learning the importance of engaging with communities to understand what statistical inequity actually

means for people on the ground, and to better understand some of the key issues that are holding inequities in place. Learning from the lived experience of affected communities is a key trend; alongside working with communities to understand aspirations and to build solutions around existing community strengths.

Focusing on equity is also driving philanthropy to look deeply at itself and its organisational practices – particularly with regards to considerations of diversity and inclusion across staff and decision-makers; as well as the extent to which their systems and processes serve to make their resources accessible to the communities that need them most.

2. Power sharing

Understanding where power lies and how power is used is a growing area of focus in philanthropy. Funders are increasingly recognising the positive power they hold – both in terms of resources and their institutional voice and power to influence wider shifts in policy, strategy, or practice. Brokering partnerships and collaboration, championing co-investment from others, convening around change agendas, sharing learning, and advocating to influence government policy are key examples of this.

Alongside these efforts to use their institutional power, philanthropy is grappling with ways to address the inherent imbalance of power that often exists between the funder and funding recipient. Reducing the grantmaking burden through more flexible and streamlined funding and reporting processes is a key first step; while moving away from project-based funding towards unrestricted support of an organisation's mission/purpose is another opportunity to balance power. Relational approaches to funding are also being adopted in efforts to build trust and reciprocity, creating the basis for more shared decision-making between funders and communities.

Newer trends point towards a growth in philanthropy looking for ways to explicitly share – or sometimes completely cede – decision-making power to community. This focuses on how resourcing decisions are being made, and by whom. This is a particularly important concern when working with Indigenous communities to ensure genuine community self-determination. Community advisory functions, participatory grantmaking models, and other forms of shared governance or devolved funding are key practices centred on issues of power and democratisation.

3. Systems change

Pursuing systems change means focusing on the conditions that hold complex problems in place. For philanthropy, this means working ‘upstream’ on the source of an issue, rather than just treating its symptoms. Food insecurity provides a good example of this – here, adopting a systems change focus might lead philanthropy to focus on investing in local food production, rather than solely funding food banks that alleviate immediate food poverty.

Literature identifies six conditions of systems change: government and institutional policies; the practices of ‘actors’ (people, organisations, networks) within a system; the distribution of resources; power dynamics; relationships and connections; and ‘mental models’ or deeply held ways of working.

For funders, working on these conditions for systems change can include things like:

- Providing unrestricted funding to ngā kaikōkiri seeking to affect systems change.
- Building capacity and capability within the systems to engage with systems change.
- Exploring ways to share and devolve power and resources to communities.
- Enabling and investing in partnerships, collaborations, and cohorts working on systems change, as well as enabling and investing in collaborative infrastructure (e.g. networks, backbone support, peer learning mechanisms).
- Rethinking the funder’s own systems, policies, processes, and practices to ensure they are not creating barriers/blockages or inadvertently upholding inequities.

4. Decolonising practice

Internationally, there is growing recognition of the importance of addressing colonial practices and their impact on the intergenerational wellbeing of Indigenous communities. In Aotearoa New Zealand, there is a growing trend of prioritising investment in outcomes for Māori, particularly where there is evidence of Māori over-representation in indicators of inequity. The nature of this investment is increasingly focused on supporting Mana Motuhake and Tino Rangatiratanga – self-determination through solutions that are by, for, and with Māori.

Importantly, philanthropic organisations are beginning to embark on journeys to decolonise their own institutional practices. This includes:

- Building relationships and mandate to work with Indigenous communities.
- Growing the cultural competency of boards and staff.

- Redesigning funding policies and processes so that they work more effectively for Indigenous communities.
- Practising adaptative grantmaking that better responds to Indigenous ways of working/world views.
- Valuing Indigenous knowledge, practices, and ways of knowing (evaluation).
- Working with Indigenous communities to determine how resources might be best used, and sharing decision-making power with Indigenous communities in ways that enable sovereignty and self-determination.

5. Adaptability and learning

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

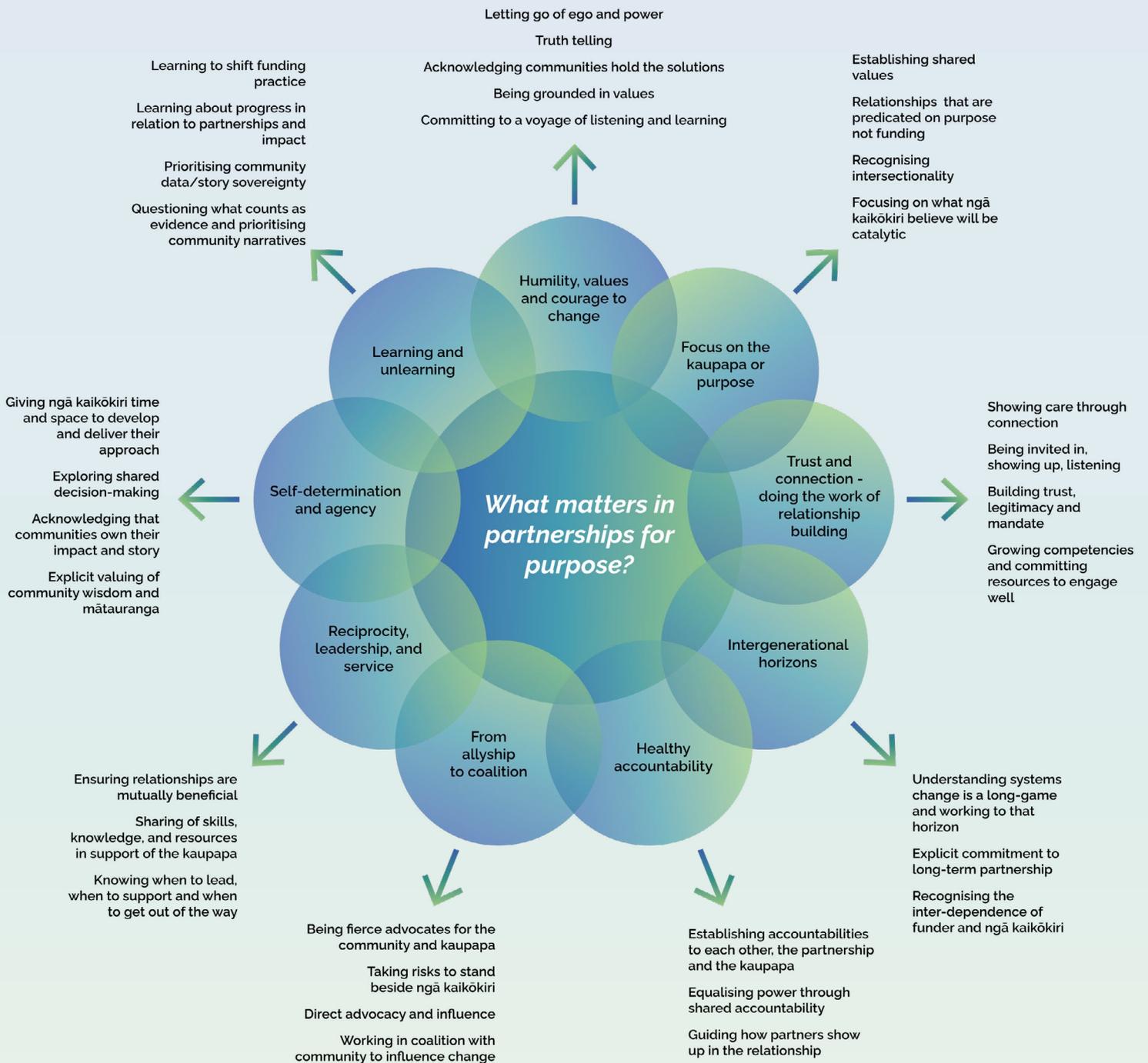
‘Adaptive philanthropy’ requires funders to:

- Develop relationships with communities that go well beyond the transactional.
- Be responsive and make rapid decisions when needed.
- Adopt decision-making behaviours that are courageous and focus on potential and learning over risk.
- Invest in ways that are fit-for-purpose to the issue, opportunity, or community need – whether that be seed funding, multi-year investments, unrestricted support towards core costs, or funding organisation types that sit outside of traditional funding policy.
- Flex funding policy to facilitate co-investment alongside others.
- Prioritise learning at every opportunity, to support adaptation and increase long-term impact.
- Ensure that insights gained from working differently are used to shift business as usual funding practices.

Shifting Culture and Power

Practices that Support Mana-Enhancing Funding Partnerships

The insights shared by funders and ngā kaikōkiri have helped to unpack what impactful, mana-enhancing partnerships for purpose look like. We have identified nine key themes, which are explored more fully in the sections below and resonate throughout the funder stories in this paper.



Humility, values, and courage to change

The funders that shared their stories for this paper all spoke about undergoing an internal change journey that started from a space of humility and a desire for truth telling – letting go of ego, admitting that they don't have all the answers, acknowledging that communities hold the solutions, and understanding that the competitive funding paradigm is an often problematic part of the systems that funders are seeking to shift. Jenn Chowanec (Wayne Francis Charitable Trust) reflects that *“funders are part of the systems we are trying to change – sometimes we need to own that”*.

More widely across philanthropy, there is acknowledgement that the systems of wealth from which philanthropy has developed have often come at the expense of the peoples and environments that it is now trying to support, and that there is a responsibility to create mechanisms for communities to make decisions on how that wealth is best applied to address inequity.

Journeying towards mana-enhancing funding practice involves deep reflection and a willingness to be challenged in ways that might feel uncomfortable and lead to significant changes in practice. Funders are urged by our storytellers to be courageous in unlearning and rethinking structures and processes that might not be serving ngā kaikōkiri or delivering the type of impact they have committed to in their strategies.

Bringing trustees along the journey, exposing them to new possibilities, and supporting them to deepen their understanding of what communities need and how funder processes and decisions affect them, is a key step. Kate Cherrington (Tupawae Roa)

reflects that trustees *“have to be courageous – it would be quite easy to keep to the same ways [of] distributing grants. Change doesn't come without its pain, but staying courageous and principled is important”*.

Being clear on values is a vital pre-requisite for mana-enhancing partnership. Only when values are clear and communicated well, can they be embodied in practice with ngā kaikōkiri. Values should be a priority navigational tool for trusts

“ Making cultural shifts in philanthropy is less about the skills or structures that you need to build, but what you need to let go of. I have really seen our board and foundation let go, so that our strategy, funding, and influence can be made more impactful for the community. If we could get more foundations into that space, we'd see a remarkable shift.

Carolyn Curtis, Fay Fuller Foundation

and foundations, and being accountable to these values in an ongoing way is also critical. Carolyn Curtis shares that deeply unpacking organisational values has been pivotal to Fay Fuller Foundation’s journey, grounding decision-making in service to the kaupapa and community. *“We have journeyed from a space of touching and feeling everything and using our heart and passion to decide where money goes, through to willingly letting go of that and embracing what it takes to bring change by asking ‘who should have the power here?’. Over time this has led to a slow letting go of ego, building of trust, and pivoting to almost the entire opposite end of the spectrum, towards thinking that people in communities have the wisdom and experience to decide where and when money flows and who we as the foundation need to be to enable that”.*

Letting go of ego and power is an ongoing process that is never really completed. Lindie Clark describes Dusseldorp Forum’s work alongside First Nations communities as *“a listening and learning voyage”*. Through funders staying open to change, being bold and transparent about what they stand for, and humble in the acceptance that they don’t (and shouldn’t) hold all of the power, space is created for more reciprocal, impactful, and mana-enhancing partnerships with community.

Trust and connection – doing the work of relationship-building

Ngā kaikōkiri are clear that mana-enhancing relationships with funders develop when there is genuine care and deeper efforts to build connection and trust. Lizzie Makalio reflects on the importance of the sense of care and authenticity that underpins Wesley Community Action’s relationship with the J R McKenzie Trust. *“We had the entire board come out here, and they felt so genuine. I showed them videos of a Mongrel Mob member story and they said it had changed their entire perception of the reality of what and who these people are. That means a lot”.*

“ Our relationship with the Peter McKenzie Project feels more like a whānau.

Tanya Anaha and Danae Etches, Why ORA

Like Lizzie, Warren Miller believes that the opportunity to host funders in the community is a critical step in building understanding and connection. *“We take foundations that we receive funding from out into our communities to get a feel for the people and the land. We want those kinds of relationships with our partners. If you’re going to fund something in South Australia, come and take off your shoes and feel the sand”.*

Tanya Anaha shares that Why ORA has a caring relationship with long-term funder Toi Foundation, where Why ORA now has enough trust and agency to ask for what it needs. *“It has been a hugely meaningful relationship for us. It’s never felt like a funder-receiver relationship. Right at the start they were asking what we need. It’s a caring relationship and ultimately, they have always believed in and supported what we are doing”.*

Building trust helps to move funding relationships from a space of transaction to one of active and reciprocal partnership (see more in the section below on the importance of reciprocity). Funders need to be patient, wait to be invited in and listen first before deciding how, when and what they can support. There needs to be a commitment to doing the work of authentic relationship-building in order to develop trust, legitimacy and a mandate to work alongside community. Kate Cherrington reflects that, *“we have to go gently [and] there is a skill in that, in being relational and at no point imposing. We can only share our kaupapa [as investors]”.*

For the funders that we spoke to, developing the understandings and competencies necessary to engage with Indigenous communities in ways that protect and enhance mana, is critical. Niall Fay reflects that Fay Fuller Foundation’s progress towards walking alongside Aboriginal-led health and wellbeing initiatives has been a journey of *“being patient, building high trust relationships and legitimacy for being a supporter of community [...] of coming in with an offer, as opposed to a tell or an ask”.* For Rosie Nathan (Foundation North), processes of whakawhanaungatanga have been key – spending time together to understand whakapapa, build connections and establish values. *“Whenever we engage with Māori, we need to understand there is a story in the room, a whakapapa we need to learn about”.* Dennis Turton (Trust Waikato) agrees, reflecting that *“our investment begins with time. We listen, we ask questions, and we talk together, building trust – but it’s not about us trusting communities. It’s about Māori trusting our organisation to be able to step into a te ao Māori space and be a genuine and enabling partner.”*

Dedicating internal resources to the groundwork of engagement is vital, ensuring that relationships are prioritised, held well, and nurtured over the long-term. Maria Ramsay (Toi Foundation) reflects that relational approaches are more resource intensive, but that authentic, mana-enhancing partnership can’t be achieved from behind a desk. *“You have to be going out, meeting people, and engaging. If you want to have enduring relationships, it starts well before you start talking about money. You need time for whakawhanaungatanga, understanding where each of you is coming from, and maybe in twelve months something comes out of it, but you have to be patient and you need the people to do it [...] It’s not always best to be lean and mean – we invest in our communities to develop their capacity and capability, and our board is prepared to invest in us to do the same”.*

Focus on the kaupapa/purpose

Both the funders and ngā kaikōkiri that we spoke to were clear that impactful, mana-enhancing partnerships focus on a shared kaupapa or purpose and are supported by shared values. Such partnerships aren't predicated on funding and recognise the respective contribution of partners towards affecting change. Chris Jansen (Leadership Lab) shares that focusing on the kaupapa helps to bring funders and ngā kaikōkiri *“around the table as equals, trying to scope an issue and find solutions to usually quite complex social problems”*. Teya Dusseldorp (Dusseldorp Forum) agrees, reflecting that *“it isn't a case of us and them; we are part of the [same] system”*.

On a practical level, focusing on purpose often leads funders towards a sharing of power through untagged investments where ngā kaikōkiri have agency to determine what they need and how to use funding to best support the kaupapa – and the importance of self-determination to mana-enhancing partnership cannot be underlined enough (and is explored more fully in the sections below).

Through its intersectionality project, J R McKenzie Trust is working with a cohort of ngā kaikōkiri on a shared kaupapa that centres on inclusion. It was explicit in co-designing with ngā kaikōkiri 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 missions and the collective kaupapa of the group. Similarly, PMP invests in a 'flotilla' of ngā kaikōkiri, where individual and collective missions to influence systems change to support flourishing whānau are placed at the centre of decision-making.

A focus on kaupapa leads funders towards adopting a more holistic, intersectional focus that recognises the complex realities of communities and the interconnectivity of systemic issues. This can mean funders are more flexible and are able to support ngā kaikōkiri to focus on the things that can be catalytic for them, and for this to change over time as community needs evolve. Jacqui Harema (Te Whānau o Waipareira Trust) reflects that *“a funding relationship should be a partnership where we are invested in something together and they are on the journey with us so we can be agile to the changing conditions in the community”*.

Intergenerational horizons

Ngā kaikōkiri are acutely aware that systems change work is a long game, and believe funders need to align their investment approaches to much longer-term time horizons. Jacqui Harema underlines that *“it took generations for these issues in community to occur, so it is going to take generations for them to shift. Some of our funding contracts are for a year or three at most, and I’m not sure what kind of outcomes they expect communities to achieve in that time”*.

Funding strategy and investment partnerships must therefore reflect a deep commitment to the intergenerational nature of equity and systems change work. Many hapū, iwi, kaupapa Māori-led organisations, and other Indigenous communities reflect this understanding through 500-year plans and a mindset that is focused on the wellbeing of future generations.

Kate Cherrington reflects that while many philanthropic organisations also *“have a view to create impact that is intergenerational, the way they are set up doesn’t allow for that. It is still really transactional for short-term, quick-fix band-aid solutions in our communities. It isn’t sustainable or enacting mana motuhake. As a board, we needed to figure out how we [disrupt that]”*.

“ If you’re getting involved in Indigenous issues, it doesn’t stop at 12 months. If you’re in it, you have to be in for the long-haul.

Warren Miller, First Nations Philanthropic Working Group

“ Our privilege has been exposure to a First Nation concept of time, of constant loops, of tens of thousands of years of consideration in relation to responsibilities to community [...] We’ve had to rethink how we consider time in our engagement with community

Niall Fay, Fay Fuller Foundation

For Warren Miller (FNPFWGI) steps in the right direction for philanthropy are committing to entering long-term partnerships with Indigenous communities. *“If you’re getting involved in Indigenous issues, it doesn’t stop at 12 months. If you’re in it, you have to be in for the long-haul”*.

Trustees also need to get comfortable with the idea that they may be investing in outcomes that take a generation (or more) to unfold. Rosie Nathan reflects that systems change work is *“a long game and something we might not see the results of, but that we have the privilege of supporting”*; and Te Pūoho Kātene grounds this in the notion of *“being good ancestors”*.

Long-term partnerships equalise power by recognising inter-dependence, whereby funders and communities are both necessary parts of the movement for change. Ngā kaikōkiri need a sense of surety and an explicit clarity of commitment about the longevity of their relationship with the funder – both the relationally and financially – even if the exact nature of any funding agreements need to be re-examined at more regular intervals. This is an important facet of mana-enhancing practice, preventing the exhausting treadmill of ngā kaikōkiri having to repetitively prove worth and providing tangible acknowledgement that what communities are working on is valued. Tanya Anaha shares, *“we always know there is limited money, and in some cases competition for funding; but with ongoing funding relationships we need to have a long-term [more than three years] relationship commitment made to us more explicitly, because if it isn’t then we don’t know what the parameters are and it creates uncertainty, which really impacts you”*.

Healthy accountability

Mana-enhancing partnerships between funders and ngā kaikōkiri must be underpinned by a clear sense of accountability to each other, the partnership, and the kaupapa. Teya Dusseldorp reflects that *“in philanthropy, no one is checking what we do, so we have a responsibility to be accountable to those we are serving”*. This mindset subverts the typical power dynamic whereby ngā kaikōkiri are accountable to the funder for grants received; moving to a space of more two-way accountability.

Niall Fay describes this as ‘healthy accountability’, which is *“a shift away from this idea that one party is accountable to another in a hierarchical structure. From a funder’s perspective, we know the power imbalance that is inherent, and we can’t fundamentally ever get away from the connotations of the funder-fundee partnership. What we shift to is healthy accountability, which is [all parties] asking who you are accountable to in doing this work and how you are showing up”*.

“ [Ngā kaikōkiri] are willing to tell us what’s not working, and the relationship we have provides the safety for that.

Maria Ramsay, Toi Foundation

Several of the funders we spoke to described working with ngā kaikōkiri to establish a relationship plan and an agreed way of showing up in the partnership. Included in this is a process to develop shared values that all partners are accountable to practising in alignment with, in an ongoing way.

Getting to this level of healthy accountability requires deep conversation and trust but allows all partners to be clear on what support is needed, when, and from whom.

Maria Ramsay shares that this also creates a space of equalised power that enables ngā kaikōkiri to speak up when things aren't working well for them. *"[Ngā kaikōkiri] are willing to tell us what's not working, and the relationship we have provides the safety for that."*

In the context of Aotearoa New Zealand, healthy accountability also considers the funder's relationship with Māori and to Te Tiriti o Waitangi, a constitutional document that establishes and guides the relationship between the Crown in New Zealand (embodied by the government) and Māori. Several of the funders we spoke to have incorporated explicit commitments to Te Tiriti o Waitangi within their strategies and practices. Chris Jansen shares that Leadership Lab has *"put giving effect to the articles of Te Tiriti o Waitangi at the centre of our work, and that has informed everything from co-design to who is involved in decision-making structures"*. For Trust Waikato, Dennis Turton explains that thinking about Te Tiriti o Waitangi led the Trust towards prioritising ways of supporting tino rangatiratanga and mana whakahaere, which has meant *"investing in the strategies of hapū, iwi, marae, and other kaupapa Māori organisations, and if needed, also funding the process whereby tangata whenua determine what they need, first"*. Toi Foundation is walking the talk of healthy accountability with Māori through its rangatiratanga strategy, which is supported by a shared theory of change developed with local iwi.

Self-determination and agency

All of our storytellers were clear that mana-enhancing partnerships rely on ngā kaikōkiri being able to self-determine their approach. For Teya Dusseldorp, enabling self-determination means funders *"coming in as partners behind communities to assist in enabling [their] solutions"*. Te Pūoho Kātene agrees, acknowledging that funders *"aren't the agents of impact; it is with communities. We need to understand the power that we have as investors but know that we don't own the impact"*. Dennis Turton also asserts that communities own their strategy, impact, and stories and that effective philanthropy should therefore be *"grounded in mana motuhake and self-determination for communities"*.

Fay Fuller Foundation has embedded community self-determination into both its purpose and organisational values. Niall explains the impact that this has on its practice and decision-making. *"One of our values is 'community knows best' and so if in the design of a new grant round or opening of a new partnership we are doing something where we are making decisions, then there is an incongruence with what we have agreed is a non-negotiable from a values perspective and we need to find a better way."*

For ngā kaikōkiri, enabling self-determination means being afforded the power to decide how funding is used (untagged giving); as well as being given unrestricted time and space to think and be able to work with their communities

from the ground up, establish their approach, build traction, and embed relationships. Jacqui Harema’s experience of funding through Whānau Ora has shown her that, even when granted freedom to deliver to their aspirations, organisations can take years to *“be freed to operate in a way where they can tell us what they need, because they are so conditioned to having service specs and outputs given to them by funders. Our job [as funder] is to free everything up so providers can do what they want to do, how they want to, with whānau in their communities”*. Warren Miller shares what that kind of self-determination feels like in practice. *“Fay Fuller Foundation have walked with us – and they didn’t walk in front, they walked beside. Finding a partner that genuinely trusts you and allows you to make your own decisions because they know you are answerable to your own community – that is real partnership”*.

Lizzie Makalio is developing a new initiative called ‘Bro Talk’, which is a space created by club whānau, for club whānau, and takes a deep dive into how whānau behave with partners, tamariki, club, and community. She explains that philanthropy has been uniquely valuable in the development of Bro Talk, supporting community self-determination in ways that government funding hasn’t been able to. *“Our work is real systems change, and without the relationship and funding from [J R McKenzie Trust], I wouldn’t have the time, space or funds to do this mahi – and the Government only has one lens and see us all as being the same, they don’t really understand the make-up of clubs, the real issues or needs, so they aren’t going to do this mahi”*.

“ Our job [as funder] is to free everything up so providers can do what they want to do, how they want to, with whānau in their communities [...] Then, as much as possible, get out of the way.

Jacqui Harema, Te Whānau o Waipareira Trust

For ngā kaikōkiri, self-determination is enabled by funders acknowledging the inherent wisdom that communities hold and placing trust in their ability to do right things in the right ways. To this end, Jenn Chowanec shares that Wayne Francis Charitable Trust is *“very clear that we have some tools and resources, but we don’t have all the knowledge and we are never the expert in the room on the issue we are discussing. We might have some views and opinions about it, but we have to learn to a greater extent about what it is we are talking about so that we can be part of the conversation about what to do next. That approach is pretty universal [for us]”*. A key part of centering community wisdom is being

specific about valuing mātauranga or Indigenous knowledge, and the ability of Indigenous communities to know what is best for their people.

Several of the funders we spoke to discussed the opportunities and challenges of shared decision-making models as a tool for ensuring that ngā kaikōkiri have agency within the funding partnership. PMP has created a shared decision-making space where ngā kaikōkiri and committee members consider how the 'flotilla' or cohort moves forward as a collective, including making decisions about other ngā kaikōkiri to be invited into the flotilla in the future. Lili Tuioti shares that this approach represents *“manaakitanga in its fullness and is about giving mana in different ways – listening, appreciating, and empathy.”*

Emma Haxton (working alongside Eastern and Central Community Trust (ECCT)), believes it is particularly critical to examine how decisions made about rangatahi involve rangatahi; and that young people are particularly adept at asking questions to determine whether the opportunity for shared decision-making is authentic or not. *“Our rangatahi are pretty clear about understanding ‘what are you asking from us, what is the power you sit in, and what are you offering to rangatahi?’”*

Threaded through community self-determination is the opportunity for funders to support capability development – equipping communities to lead change, investing in community governance structures, and supporting equitable participation and pathways into decision-making spaces for communities who may otherwise experience barriers.

Reciprocity, leadership, and service

Reciprocity is a central principle that runs through all identified characteristics of mana-enhancing partnerships. For power to be truly shared between partners, the relationship must be mutually beneficial, affording respect to the mana and contribution of both ngā kaikōkiri and funders.

Warren Miller can't underline the importance of reciprocity enough. He recalls approaching Fay Fuller Foundation for \$15 million for a new building, which they didn't have the capacity to support. What was proposed by the Foundation instead was a more active and reciprocal partnership. *“They said ‘what we can do is fund you for three years to help get you in the right place with politicians and other funders; and in return you can help us develop our approach to First Nations funding’. That is true partnership”*. Tanya Anaha agrees that mana-enhancing partnerships uphold both parties' agency and enable a sharing of

resources (e.g., skills, knowledge, relationships) that supports the kaupapa, creating “*a feeling way beyond a funder-grantee relationship. There’s no power difference, it’s a mutually beneficial partnership.*”

Toi Foundation offers an example of good practice in this space, having developed memorandums of understanding with six iwi in Taranaki that are each based around shared theories of change and values, rather than being explicitly tied to funding. Maria Ramsay shares that “*the key thing about these MOUs is that they are purely about how we work together and support each other. It really is a reciprocal relationship rather than a funder-applicant relationship [...] We wanted to form true, trusted relationships that are mana-enhancing for each other*”.

The tension for funders when working towards reciprocal partnerships is balancing leadership with service; considering when to wield its institutional voice and power for influence, and when to stand behind ngā kaikōkiri partners – or even get out of the way completely. PMP is grappling with this as part of its participatory decision-making model. Lili reflects that PMP is navigating a delicate balance between “*not putting too much additional responsibilities on ngā kaikōkiri, as their priority is to do their mahi. Sometimes it’s deciding when we need to lead and when to leave decision-making in their capable hands.*”

From allyship, to coalition

Jacqui Harema explains that systems change work requires both ngā kaikōkiri and their funders to be “*fierce, relentless advocates so that we can advance our people. The advocacy of Tapuwae Roa is helping us to network and make connections based on whanaungatanga, because you have to get people to the table to make change and to get to longer-term sustainable funding*”.

Through her mahi, Lizzie Makalio, together with her husband – a senior member of the Mongrel Mob for 47 years with a very positive and proactive profile in the club space at a national level – have the opportunity to work on the ground building community-led initiatives that support gang whānau with education and wellbeing outcomes. This involves working with whānau impacted by alcohol, drugs, and family violence, as well as working directly with people in incarceration. From a funder perspective – particularly for government – this work could be perceived as a high-risk political football. Lizzie underlines how mana-enhancing it has been to have a funder like the J R McKenzie Trust fully embrace

“ J R McKenzie Trust has been the epitome of advocacy and allyship

Lizzie Makalio, Wesley Community Action

this risk and go on the journey with them as allies and advocates. *“For the Trust, it wasn’t about risk and ‘giving those bad people money’, it has been ‘what do you need and how can we help you do this?’ And after our first piece of funding, they said to us ‘what else do you want to do, Lizzie?’ They’ve made sure we have everything we need to be successful”.*

Through the First Nations Philanthropic Funders Working Group, Fay Fuller Foundation is enabling Aboriginal communities to develop structures and self-determine where and how philanthropic resources are used to support Aboriginal health and wellbeing outcomes. Warren Miller underlines the importance of funders playing the role of advocates and allies – not only in terms of bringing other funders and partners on board with their mission, but in terms of working to *“challenge and decolonise philanthropy itself. That kind of partnership and advocacy gives me goosebumps. It’s become a vision of changing the DNA of philanthropy together”.*

Nicola Brehaut (Foundation North) shares that philanthropy has an advocacy role to play alongside ngā kaikōkiri to support systems change, particularly through using its institutional voice and relationships to influence government. For example, as part of its GIFT project focused on restoring the mauri of the Hauraki Gulf, Foundation North made direct submissions to the Climate Change Commission, Department of Conservation, and Ministry for Primary Industries, sharing evidence and learning from its investments and partnerships with ngā kaikōkiri.

Niall Fay describes a conscious movement in language and practice from allyship to coalition, which attempts to more keenly recognise philanthropy’s role alongside its partners in affecting change. Teya Dusseldorp shares an example of this nuance in practice, describing Dusseldorp Forum’s direct advocacy to government as being more impactful – and more mana-enhancing – when done alongside community rather than on behalf of. *“Sometimes [systems change work with community] reaches a ceiling where if you don’t have government on board, they can pull the rug out on progress in an instant through things like policy changes or funding changes. In the early days of our work, we were asked to advocate to ministers and bureaucrats, but worked out we needed to do that together with community in order to be impactful.”*

Jenn Chowaniec underlines the importance and value of funders understanding what they can bring – beyond funding – to advance an issue. Actively connecting and brokering opportunities is key, as is going out to *“find the money, find the doors we want to knock on, open doors in advance, and leveraging the relationship that we have with other funders in different ways”.* Jenn also supports the movement towards funders and ngā kaikōkiri working in coalition. *“We’ve got to stop thinking of the two [ngā kaikōkiri and funders] as entirely separate”.*

Learning and unlearning

Our storytellers described effective philanthropy as an ongoing process of learning about what works and what doesn't, and unlearning practices that aren't serving communities – particularly colonised processes and the hierarchical power dynamics of transactional models of philanthropy.

Learning-led practice is particularly important for funders looking to influence systems change. This involves letting go of notions of 'funding accountability', instead focusing more deeply on learning about where there is traction with priority issues, how partnerships are progressing, and the conditions that can support systems change. Maria Ramsay shares that Toi Foundation seeks to walk alongside organisations as learning partners. *"We are learning a lot from [ngā kaikōkiri], and they learn from us. We don't just expect a group to come back and tell us about some outcomes in 12 months' time. Now our practice is more about having conversations, realising that the outcomes the community want to achieve has led them in a different direction, and learning from that."*

Like Toi Foundation, other funders are turning to relational approaches alongside ngā kaikōkiri to facilitate honest feedback and reciprocal learning, with a particular focus on understanding what role the funder is playing (or could play) in enabling impact. Eileen Kelly explains that J R McKenzie Trust's evaluative focus is *"understanding what impact we are having in supporting our partners to do more and have more impact"*. Dennis Turton shares the view that funders' approach to evaluation and learning should centre on *"being clear what our role is in supporting communities' impact [to] guide our future decision-making and funding practice [and] equip our partners to continue leading change in their communities"*.

A key facet of effective learning practice is funders challenging themselves on what counts as evidence of impact – with a particular emphasis on prioritising whānau and community narratives. Being responsible with communities' stories and sovereignty of data is a key concern in the context of mana-enhancing partnership. The Dusseldorp Forum is particularly innovative in this space, supporting community storytelling not only to understand impact, but as a powerful tool for influencing widely held mindsets and beliefs as a lever for systems change. This work involves supporting community capacity development in relation to evaluation and storytelling, including peer support for Indigenous evaluation practitioners. Teya Dusseldorp explains, *"we get so far with influencing government people, but they keep snapping back [to business as usual] because they actually haven't shifted how they see people in communities and the belief that the expertise and power sits outside of community. [Part of our solution is] removing ourselves as the translator, and resourcing communities to do their own storytelling."*

Stories of Shifting Culture and Power

Funder Journeys

Stories of Shifting Culture and Power

Funder Journeys

Shared in the following sections are the stories of ten trusts and foundations and their journeys of evolving practice. Each story reflects many or all of the themes identified in Volume 1. They share learning about ways of working that centre equity, share power, enable meaningful relationships with Indigenous communities, support rangatiratanga/community self-determination, and make progress towards systems change outcomes.

The stories were gathered through interviews with staff and trustees, with further insights generated through a convened roundtable discussion where participants were able to collectively reflect on their challenges, successes, and learning.

A glossary is included in Appendix 1 for te reo Māori and other terminology used in this section.



Dusseldorp Forum: Deep, long-term relationships that support community-led systems change agendas

Dusseldorp Forum kaupapa

Dusseldorp Forum is a family philanthropic foundation focused on improving education, health, and social outcomes for children, their families, and communities across Australia. The organisation was established in 1989 from a grant of shares to mark the retirement of GJ (Dick) Dusseldorp as founder and executive chairman of the Lend Lease group of companies. In establishing the Forum, Dusseldorp sought to make a tangible difference to the lives of young Australians by bringing people together to develop shared solutions to complex challenges.

Today, Dusseldorp Forum works proactively with a select number of lighthouse partners to support place-based, community-led initiatives that transform the life opportunities of children and their families. This approach involves working collaboratively across government, not-for-profits, corporates, philanthropy, and communities to connect dots and achieve lasting systems change. Initiatives are intended to act as demonstration sites for how communities can lead systems change so that resources are better aligned to community needs.

The Dusseldorp Forum team focuses on building trusted, long-term partnerships to contribute to a range of intended system-level outcomes that include equipping communities to lead change, cultural regeneration, and funding policy/system reform for greater equity. Each lighthouse partnership involves funding – which community governance determines how to mobilise – as well as a range of other tangible support and resources provided by Dusseldorp Forum, including things like advocacy alongside community leaders to government and other funders, sitting on governance bodies, and providing connections to and resourcing external expertise.

Whakapapa – the Dusseldorp journey

Executive Director Teya Dusseldorp describes Dusseldorp Forum’s approach as “working deeply over the long-term in a number of communities to support the community-led systems change agendas of those places”. Teya explains that this can look different in each community based on their respective priorities and aspirations, but the common thread is that the relational and community-led approach

is key. “We are bespoke in how we work with people. We aren’t a ‘funding’ organisation, we don’t talk about grantees, we don’t have application processes”.

“ We are bespoke in how we work with people. We aren't a 'funding' organisation, we don't talk about grantees, we don't have application processes.

This way of working emerged after the 2008 global financial crisis, when Teya invested significant time engaging with community leaders and First Nations elders to understand what the lasting impact of Dusseldorp Forum’s work to date had been, and critically, the specific issues that were of priority concern to communities. Board member Lindie Clark describes this as a “listening and learning voyage” alongside First Nations communities, and credits it with helping challenge the Dusseldorp Forum board to understand that its relatively narrow focus on education as a gateway to increasing opportunities for young people wasn’t sufficiently holistic to meet the complex needs and aspirations of the communities it was trying to serve.

Dusseldorp Forum was invited into the New South Wales community of Bourke and began building direct relationships with First Nations leadership, which surfaced priority concerns around the youth justice system as a root cause issue affecting wider youth health, education, and employment opportunities. Teya reflects that

Dusseldorp has learnt to listen to communities about the solutions they hold. “We come in as partners behind communities to assist in enabling those solutions. Developing long-term and deep relationships over time is key to how we work with communities”.

How The Philanthropic Landscape key practices present in the work of Dusseldorp Forum

Dusseldorp Forum now manages a small number of partnerships – some over ten years old – to ensure it is able to dedicate enough time to making its relationships with communities authentic and effective. Each partnership is underpinned by a relationship plan that captures shared priorities as they evolve and shift. Also important is working with communities to ensure they develop fit-for-purpose governance structures that enable them to authentically hold decision-making about resourcing these plans.

Teya explains that Dusseldorp Forum’s relationship model illustrates its mindset shift to “to follow community’s lead based on what they know [...] and put faith and trust in community decision-making”. This isn’t a traditional funder-fundee relationship – and while Dusseldorp Forum brings funding and other resources to the table, it is the community deciding what that resourcing is going to do. Lindie reflects that “the amount of money that the Forum is investing is relatively modest, but the dollars

are only part of the resourcing package, which is the people, the relational form of engagement, and being a leadership sounding board”. Dusseldorp Forum also has an explicit internal budget line for resourcing relationship building and is continually thinking about what is needed to build trust and relationships.

Dusseldorp Forum also helps to broker investment by other funders into the communities that it is partnering with, helping ensure that this funding is managed on the communities’ own terms by encouraging those investors to adjust their practices rather than expecting communities to shapeshift to multiple funding and reporting demands. Teya shares that one of Dusseldorp Forum’s partnerships in Victoria has developed a ‘Philanthropic Alliance’ of funders. “We have six-monthly get togethers; we all get the same reports, and we come together to verbally discuss these in ways that give opportunity for cross-fertilisation and strategic discussion to tap into the shared expertise, influence, and connections we hold”.

Dusseldorp Forum’s community partners are continually pushing boundaries around practice. Governance is a key example of this, with work ongoing to explore the role and structure of First Nations governance models and opportunities for intergenerational pathways that bring younger generations into those spaces. Teya explains that this governance development work is also a good example of how Dusseldorp Forum is learning to examine its own practices and structures

as its community partners grapple with these types of issues. Dusseldorp Forum sees it as important to turn the mirror on itself, seeing that “it isn’t a case of us and them; that we are part of the system”. For Lindie, a key challenge and opportunity for the Dusseldorp Forum moving forward is navigating how, as a constituted family foundation, it can make space for First Nations communities to be better represented in its own extended governance and decision-making mechanisms. Teya outlines that this work “is about the intelligence that diversity of thought and experience brings to our practice”.

“ Values-based practice is increasingly coming to the fore as Dusseldorp Forum refines its way of working alongside communities.

Values-based practice is increasingly coming to the fore as Dusseldorp Forum refines its way of working alongside communities. Teya shared that communities are asking for it to articulate its principles more clearly. Working through this with the board and partners is a process that Dusseldorp Forum is taking its time to get right. “We need to be able to not only communicate our principles but embody them; because our partners want us to play more of a role model role, being upfront about our ‘how’ and ‘why’, so that others can have more of an understanding of what our different way of working looks like.” Lindie adds that this process is pushing Dusseldorp Forum to “get bolder about articulating what it stands for –

which is racial equity, gender equity, and cultural regeneration”.

“ In philanthropy, no one is checking what we do, so we have a responsibility to be accountable to those we are serving.

For Teya, the key next practice is about being accountable to these principles and values-based practices. “In philanthropy, no one is checking what we do, so we have a responsibility to be accountable to those we are serving”. To respond to this challenge the Forum has developed a measurement framework with a specific focus on checking in with its partners to test how it is embodying its principles, and seeking honest, critical feedback.

Dusseldorp Forum is overtly working on local, regional, and national systems change agendas alongside its community partners. Across the work, this is enabling the Forum to build a more nuanced understanding of the conditions that support change, and the role that philanthropy can play as an actor in these systems. Teya reflects that “a lot of philanthropic foundations are working on those [conditions for systems change] layers of policy, resources, and structures. We’ve been focusing on policy reform and structural mechanisms for shifting power”. However, Dusseldorp Forum is now beginning to deepen its focus, seeing potential for driving structural change by focusing on shifting wider belief systems through transformative narratives and stories.

To this end, Dusseldorp Forum is proactively leveraging its own internal

dedicated communications role to create opportunities “for our partners to lift their heads above the clouds and share and celebrate their stories of change.” It is also currently working on resourcing communities to have sovereignty over their own data, and cultivating practices around community storytelling, which Teya believes holds much promise for the mindset shifts needed to drive wider structural reform. “We get so far with influencing government people, but they keep snapping back [to business as usual], because they actually haven’t shifted how they see people in communities and the belief that the expertise and power sits outside of community”. Board member Lindie Clark reflects how Dusseldorp Forum’s own mindset shifts were heavily influenced by “hearing the powerful narratives from Dusseldorp Forum’s First Nations partners”.

“ The Forum has developed a measurement framework with a specific focus on checking in with its partners to test how it is embodying its principles, and seeking honest, critical feedback

Looking forwards, Teya believes that the opportunities for Dusseldorp Forum will be in growing the connections between government and communities while “removing ourselves as the translator, and resourcing communities to do their own storytelling”; as well as continuing to influence wider practices by “challenging what counts as evidence in philanthropy”.



Eastern and Central Community Trust: Sharing Power with Young People through TiraRangatahi

Eastern and Central Community Trust kaupapa

Eastern and Central Community Trust (ECCT) is one of twelve community trusts in Aotearoa New Zealand, providing grant funding and support to community organisations operating in the Gisborne Tairāwhiti, Hawke's Bay, Tararua, Manawatū, Horowhenua, and Wairarapa districts. Through its grants, ECCT invests approximately \$6 million per annum in its communities.

TiraRangatahi is an independent rangatahi rōpū that is working in partnership with ECCT. The rōpū has facilitated the creation of a Rangatahi Action Plan that outlines a vision for change informed by rangatahi aspirations across the ECCT rohe. ECCT has committed \$4 million over four years to enable funding initiatives designed, curated, and developed by TiraRangatahi.

Whakapapa – the journey of developing TiraRangatahi

ECCT published its strategy in 2018, identifying children and young people as a focus area to be supported by its

strategic modes of grantmaking. The prioritisation of children and young people was based on a combination of community consultation and indicator data that showed evidence of regional disparity experienced by younger populations. Trustees were interested in working differently to develop the ECCT's youth focus area, and created an environment where staff had space outside of the trust's responsive grantmaking to try something new and learn.

“ Trustees were interested in working differently to develop the ECCT's youth focus area, and created an environment where staff had space outside of the trust's responsive grantmaking to try something new and learn.

ECCT embarked on a deep and considered process of youth engagement to determine how it might use its strategic funding and other resources to help realise the aspirations of local rangatahi. An initial project budget of \$250,000 was provided to explore what an adult-initiated but

rangatahi-led process for activating the trust's youth focus area could look like. This included \$50,000 of initial pilot grant funding.

ECCT embarked on a 12-month period of youth engagement, including hui, informal conversations, wānanga, and other activities. A rangatahi leadership rōpū was formed, comprising predominantly rangatahi Māori aged 16-25 years. The rōpū co-facilitated engagement activities alongside ECCT staff and took on greater leadership of the project as their confidence and facilitation skills developed.

A major output of this engagement was the Rangatahi Action Plan and subsequent commitment by ECCT to resource youth-identified priorities through initiatives led by, with, and for rangatahi.

How The Philanthropic Landscape key practices present in the work of Eastern and Central Community Trust

Project Manager Emma Haxton reflects on the importance of ECCT being open with its process and listening to rangatahi right from the beginning. "We needed to go to rangatahi straight away to design how to do this, to understand how rangatahi wanted to be involved. The key thing we heard back was around allowing rangatahi to own the project."

Piripi Ropitini began his connection with this work as a participant. He became

“...the first opportunity for rangatahi Māori to voice their opinions about the community without being judged

a rōpū representative and has now been employed as ECCT's Rangatahi Engagement Specialist. He recalls being called to an ECCT rangatahi hui and feeling that it was "the first opportunity for rangatahi Māori to voice their opinions about the community without being judged [...] The major thing was feeling looked after. The manaakitanga was unmatched...we were taken care of and so could participate fully."

ECCT noticed that the level of trust and partnership with young people deepened over time. The trust worked in ways that enabled rangatahi to consciously explore themes of power, colonisation, and equity as they developed the action plan. The result is a plan that centres these issues across core strategies, including for example:

- **Challenging the system:** Challenging inequalities in systems that marginalise rangatahi. Contributing to decolonisation. Growing rangatahi voice and leadership.
- **Sharing the power:** Supporting more power-sharing between rangatahi and adults in organisations and communities.

There is also an overarching intent to address regional equity issues. For Piripi, it was important that TiraRangatahi

“focused on the level of fairness and where a lot of pūtea and mahi should actually go. Rangatahi in rural areas are often disadvantaged and left out, so this pūtea can level that out”.

Piripi reflects that the eventual commitment of \$4 million to the Action Plan by ECCT is seen as a show of trust that affirms the power-sharing model. “It was like winning the Lotto. Across the whole process we were in awe of how ECCT trusted us, put faith and pūtea and mana in us to design realistic and actionable change for young people that is youth-led.”

For ECCT trustees, there was some initial concern about the initially slow pace of project development but engaging directly with the young people involved provided reassurance. “Trustees were

“ When trustees met the rangatahi and saw the values, there was a lot more comfort and relaxation. They could also see how what was chosen to be funded aligned to those values. That made sense to them, and that led to trust being developed.

used to our normal funding processes, but this was going slower at the start as rangatahi worked out their values,” an ECCT advisor observed. “But when trustees met the rangatahi and saw the values, there was a lot more comfort and relaxation. They could also see how what was chosen to be funded aligned to those values. That made sense to them, and

that led to trust being developed.” This grounding in shared values meant that the project could move more quickly later.

The partnership that has now developed between ECCT and TiraRangatahi is also demonstrably contributing to the indigenisation of ECCT’s funding practice, enabling rangatahi Māori space to meaningfully incorporate te ao Māori. Piripi explains that young people “are the ones making decisions, [using processes that] we designed from scratch with the holistic inclusion of te ao Māori and wairuatanga. Whatever kaupapa we come across, we see what our puku is saying. We ask, ‘does it feel like we should invest in it?’; or if it doesn’t feel good then we explore why and figure out what we need to do to address that [...] We also really whakatinana our values. It’s unconscious; it’s Māoritanga.”

As new trustees come on board, staff are proactive in reaffirming the kaupapa of this work to maintain an ongoing level of comfort from the board to cede decision-making power to the rangatahi involved. Whakawhanaungatanga continues to play a key role. Emma explains that “one of the things is that this is all based on relationships, influence, and trust. The relationships are organic, shifting, and moving. You have movement in the rōpū members, the ECCT board. People also change [...] so, making sure that there is a grounding in relationships is important.”

As TiraRangatahi moves into implementation of the Action Plan, the importance of relational practice has

continued to come to the fore. In his employed role with ECCT, Piripi has been more exposed to the wider funding system and is aware how importantly different the process is for TiraRangatahi. “For us, it is getting a name and number, getting people to tell us about their kaupapa, working with them if we need to learn a bit more...We want good stuff to happen, and if we believe in the kaupapa we will support it.”

Key elements of this practice have rippled across ECCT’s other funding processes. Seeing values in action and having relational points of access into the trust has seen more kaupapa Māori organisations engaging with ECCT who might otherwise not have seen a fit or felt that ECCT was accessible to approach.

As those involved with TiraRangatahi look to the future, they reflect on the importance

that adaptability and learning will have on achieving the vision for impact. “Flexibility for the rōpū is important ongoingly as they are learning and growing in the process, and the process adapts in relation to that,” Emma notes. “They gain knowledge from being involved, from others in the sector, and from being out in their communities. That shifts the process. That adaptive nature of it means that they are more in tune with what is going on with their communities and where funding can make more change. In terms of what TiraRangatahi want to do in the community it is about systems change at so many levels; having a voice, more power in the communities [...] Flexibility can support this to happen.”

“ Flexibility for the rōpū is important ongoingly as they are learning and growing in the process, and the process adapts in relation to that.



Fay Fuller Foundation

Fay Fuller Foundation: Co-designing structures for community-led decision-making

Fay Fuller Foundation kaupapa

Fay Fuller Foundation is a private philanthropic organisation in South Australia, founded in 2003 by Margaret ‘Fay’ Fuller with a broad and flexible remit to support the health of South Australians. Since establishment, the foundation has distributed more than \$20 million in funding to almost 70 organisations.

The foundation’s purpose is to “resource community determined responses to complex challenges”. This is underpinned by principles of being community-centred and enabling communities to be self-determining; building trust-based partnerships that go beyond financial resourcing; and seeking to influence the wider determinants and inter-connected systems that impact the focus areas in which the foundation seeks to achieve impact.

Fay Fuller Foundation’s focus areas include mental health and wellbeing, First Nations-led health funding, and ‘practice and collaboration’, which includes developmental collaborative work to strengthen the foundation’s own philanthropic practice.

Whakapapa – The Fay Fuller journey

Director Carolyn Curtis reflects that the foundation’s board “has journeyed from a space of touching and feeling everything and using their heart and passion to decide where money goes, through to willingly letting go of that and embracing what it takes to bring change by asking ‘who should have the power here?’”.

Over time this has led to “a slow letting go of ego [and power], building of trust, and pivoting to almost the entire opposite end of the spectrum, towards thinking that people in communities have the wisdom and experience to decide where and when money flows, and who we as the Foundation need to be to enable that”.

That mindset shift at the board level created space for the foundation to recognise its responsibility to supporting First Nations’ philanthropy, health and wellbeing. Chief Executive, Niall Fay, reflects that this enabled an honest conversation where the foundation realised that it needed “not to determine ourselves what a model of best practice philanthropy with the Aboriginal community would look like, but allowing a process to emerge where that is defined by community, for community, and is run by community”.

How The Philanthropic Landscape key practices present in the work of Fay Fuller Foundation

Through its First Nations Health Funding initiative, Fay Fuller Foundation has moved into a space of overt power-sharing, enabling Indigenous self-determination through models of decision-making and priority setting that are actively designed by and for Aboriginal communities. However, the process for arriving at this space has been a long one of “being patient, building high-trust relationships and legitimacy for being a supporter of community [...] of coming in with an offer, as opposed to a tell or an ask”.

For Carolyn, “making cultural shifts in philanthropy is less about the skills or structures that you need to build, but what you need to let go of. I have really seen our board and foundation let go [of power], so that our strategy, funding, and influence can be made more impactful for the community. If we could get more foundations into that space, we’d see a remarkable shift”.

This practice of letting go of power and trusting community-led decision-making is one that, Carolyn reflects, takes constant work. “We are like an elastic band, there is always a tendency for snapping back to what we think we know, but we know that throwing money at things can do more harm than good. We need to keep asking what we can do to help communities succeed.”

Niall recognises that, across philanthropy, a lot of intended participatory decision-making structures were being designed by philanthropy first, and then being imposed on community. Fay Fuller Foundation has tried to flip this. “Our practice is about being clear that we aren’t best placed to determine the structure of things, but rather understand that we can build a square, circle, triangle, or star if that meets community needs, rather than forcing them to fit into our box [...] We’ve had some fantastic wins by not centring the foundation”.

An ‘interim’ model of community-led decision-making has been established within the First Nations Health Funding initiative, while a broader and more long-term model continues to be developed. The ultimate goal is to enable Indigenous health experts and Indigenous communities to make decisions about the prioritisation of philanthropic dollars to support health and wellbeing outcomes, using an Indigenous decision-making model.

“ Making cultural shifts in philanthropy is less about the skills or structures that you need to build, but what you need to let go of.

Niall underlines the importance of adaptability and learning to the success of community-led ways of work. “Our model will need to evolve. We will be continually refining the way that the community leads this decision-making model, while

the ‘what’ [is funded] is continually refined by the input of Indigenous health experts. By doing this, we can take into consideration the social, emotional, and cultural wellbeing of the community, to heal and to grow in ways that community are determining”. One future possibility is for this model to involve the establishment of an entirely separate and autonomous Indigenous fund, controlled by community, into which multiple funders co-invest in ways determined by the community.

“ We’ve had to rethink how we consider time, our engagement with community, and how we need to adapt our structures.

Fay Fuller Foundation’s deliberate move to work with First Nations communities using a power-sharing model also illustrates the foundation’s journey of decolonising its practice. Niall explains that “our privilege has been exposure to a First Nation concept of time, of constant loops, of tens of thousands of years of consideration in relation to responsibilities to community [...] We’ve had to rethink how we consider time, our engagement with community, and how we need to adapt our structures.”

Niall reflects that a key first step in this process was committing to “showing up” and doing the work of relationship building, and building legitimacy by showing communities that the offer of partnership was authentic and enduring. The foundation is now at a point in its own journey where it can consider how its own core structure might be re-imagined,

to align more clearly with Indigenous models. “We are looking at someone to come onto our board with a brief to fundamentally adjust our governance structures and practices within an Indigenous framework”.

Through working to uplift community voice, other philanthropic funders in the state are seeing the potential of this community-led way of working and are keen to invest. Beyond the additional dollars leveraged, the big ‘win’ has been influencing other funders to move along on their own journeys of decolonising practice and examining how problematic structures, mindsets, and processes might be dismantled to make space for equitable partnerships with First Nations communities. Niall notes that “there are other foundations outwardly articulating that philanthropy needs to change, especially in relation to First Nations communities [...] What we need to do is make sure First Nations partners have space to speak to influence this practice and the role that philanthropy could be playing”.

As the foundation continues to explore the practices and decision-making structures needed to enable community self-determination and impact, Niall explains that the foundation’s attention is focused on trying to move from an offer of allyship to one of coalition. “Allyship still seems to signal a beneficiary kind of relationships, whereas a coalition of change recognises our roles and responsibilities for achieving change together [...] of communities partnering with us on their own terms”.



Foundation North: Centering Indigenous concepts and building cultural capability

Foundation North kaupapa

Foundation North is one of twelve community trusts in Aotearoa New Zealand, providing grant funding and other support to community organisations operating in the Auckland and Northland regions. Through its grants, the foundation invested approximately \$52 million into its region's communities in the financial year ending 2022.

Foundation North's vision is 'enhanced lives', which it aims to achieve through four strategic focus areas of hāpai te ōritetanga (increased equity), whakauru mai (social inclusion), whakahou taiao (regenerative environment), and hāpori awhina (community support). Across these focus areas, community priorities are identified that include Tangata Whenua, Pacific Peoples, communities of South Auckland, communities of Te Tai Tokerau (Northland), children and young people, new migrants, former refugees, people living with a disability, and rainbow communities.

Foundation North also prioritises support for initiatives, actions, and activities that focus on increasing understanding and giving effect to Te Tiriti o Waitangi; as well as mitigation and adaptation to the threats posed by climate change.

Grant funding is distributed through a range of channels including Quick Response Grants, Community Funding, and more proactive Impact Funding. This story is focused on Foundation North's Gulf Innovation Fund Together (GIFT) initiative, and its influence on the foundation's wider practice.

Whakapapa – the journey of centring mauri within GIFT

The GIFT initiative was developed in 2016 in response to increasing evidence that the health of Tikapa Moana Te Moananui-ā-Toi (Hauraki Gulf) was in decline. Research and kōrero with iwi, Māori, and other stakeholders supported the idea of a bold, sustained, and innovative approach, and those designing the new fund saw an opportunity to place the Māori concept of mauri at the centre.

A separately branded GIFT fund, with an initial \$5 million over five years, enabled a small team within Foundation North to develop a fluid, nimble, and collaborative funding mechanism to seed experimental initiatives, scale projects shown to have potential, and develop initiatives looking to effect systemic change. GIFT-funded projects also received capacity and evaluation support from the Centre

for Social Impact. A total of \$11 million has now been granted via GIFT.

The ‘seed, scale, and system’ approach taken with GIFT built on practice and learning developed through previous Foundation North venture philanthropy funding models – such as the Māori and Pacific Education Initiative (launched 2006) and Catalysts for Change (launched 2013) – which had experimented in the spaces of high-trust partnerships, multi-year funding, capability development, and funding of innovation. Kim Collins, Foundation North’s former GIFT Project Manager, reflects that GIFT was established with a distinct goal of trying to achieve impact both by funding innovation and adopting innovative philanthropic practices.

“ We knew we couldn’t determine what mauri looked like, and that it needed to come from the perspective of whoever was doing the work

In its early years, GIFT attracted requests from applicants normally excluded from the foundation’s usual funding criteria – such as individuals, small companies, and academic researchers. Foundation North appointed both a science advisor and a mātauranga Māori advisor to the board as part of GIFT; and also began exploring working with mauri following conversations with Dr Kepa Morgan around using his mauri-o-meter as an evaluation framework. Kim explains that Foundation North grappled for some time with how to weave mauri into GIFT’s intent and practice. “We knew we couldn’t determine what mauri looked like, and that it needed to come from the perspective of whoever was doing the work”.

What mauri looked like in practice for GIFT took time to emerge. Kim reflects that the ‘penny

drop moment’ for her about the practices needed within GIFT to work effectively with mauri was hearing Teina Boasa-Dean speak at a GIFT-convened wānanga about mauri. “She talked about mauri coming through whakapapa and being a birth right for tangata whenua. It became clear to me then that GIFT had to prioritise tangata whenua-led applications or genuine treaty-based partnerships, because tangata whenua had to be included in the conversation if we were looking at the restoration of mauri”. Kim highlights that Rosie Nathan (Engagement Advisor – Northland) coming on board with GIFT was another turning point. “Rosie asked key questions about our understanding of mauri” in a way that gently challenged and strengthened GIFT’s approach.

Around year three of the initiative, this journey led to a shift in emphasis, where the GIFT team adapted its ways of working to be more culturally responsive and initiatives led by tangata whenua became a distinct priority. Mātauranga Māori practices and approaches were recognised, valued, and implemented, and the GIFT network’s understanding of mauri was deepened through wānanga with Te Kaa.

How The Philanthropic Landscape key practices present in the work of Foundation North

The most recent GIFT report shares learning about the impact of the initiative over a five-year period, including a suite of principles for working with restoring mauri, and how these show up in practice.

Rosie Nathan highlights that a key approach for GIFT was that “we took humans out of the centre, and we placed te taiao, mauri – the tangible and intangible – in the centre instead”. Kim adds that, what this meant, was that “people had to bring a new way of being,

including ourselves”. These new ways of being centred firmly on authentic relationships with tangata whenua.

Rosie reflects that at the beginning of GIFT, “there were challenges in how the organisation held relationships with tangata whenua and Māori”. Overcoming this was a matter of working with the team, and “sharing alternative ways of being with Māori”. One of the key challenges that needed to be addressed was speaking with tangata whenua about what the ‘innovation’ sought through GIFT meant to Foundation North. “We had to determine how we kōrero to innovation – what does that mean to Foundation North. We needed to be tika about that [...] and create a safe space for dialogue about that with tangata whenua and admit that we were learning”.

“ Whenever they engaged with Māori that there is a story in the room, a whakapapa that they needed to learn about.

It was critical that the foundation sought to engage with tangata whenua in a way that was underpinned by values that “aligned to tikanga, to Māori, to mauri, the creation story – all of those kaupapa”. Also important was the openness of Foundation North’s non-Māori staff to learn and explore how to work effectively with tangata whenua. The humility of the team’s approach is visible and demonstrably enabling of the fundamental shifts in practice across the wider organisation. Rosie also worked with the team to create guidelines for all of Foundation North’s future engagement with Māori.

Through their involvement in GIFT, Rosie observed a strengthened commitment from all GIFT kaikōkiri to weaving mātauranga Māori into their practice and to understand that

“whenever they engaged with Māori that there is a story in the room, a whakapapa that they needed to learn about [...] including Te Tiriti o Waitangi”. Kim highlights that GIFT’s tangata Tiriti organisations were starting to plan for and resource engagement with tangata whenua in their budgets and strategies. There was also a distinct shift towards “letting go of the outcome, and focusing on the relationship, [understanding that] marine regeneration that doesn’t address mana whenua’s cultural needs isn’t acceptable”. This has also created the conditions for enduring relationships and collaboration across the GIFT partners.

GIFT’s remit as a discrete innovation fund created space for deep practice development in relation to Te Tiriti o Waitangi and partnerships with tangata whenua. In many ways, this space was necessary to enabling internal readiness within the wider organisation to embark on a journey of development around Te Tiriti. Progress here is clear, with trustees now setting a clear commitment to Te Tiriti as a pou for supporting the foundation’s strategic focus areas.

Another key practice within GIFT was a deep focus on evaluation and learning. Centre for Social Impact researcher and evaluator Rachael Trotman walked alongside the GIFT team from the fund’s inception, “challenging, ratifying, stretching, and enquiring”. As the GIFT initiative moves into a space of greater maturity, this learning about systems change practice has shown Kim that “naming the systems that aren’t working, and facilitating the bringing together of groups to explore why these systems aren’t working” is an important practice. Shifting systemic issues takes an ecosystem approach. For Rosie, a focus on learning is critical because systems change work is “a long game and something we might not see the results of, but that we have the privilege of supporting”.



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

“ 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.

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.

“ 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.

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.



Peter McKenzie Project: Evolving a participatory approach

The Peter McKenzie Project kaupapa

The Peter McKenzie Project (PMP) is a key programme of family foundation, J R McKenzie Trust. It supports a small group or 'flotilla' of initiatives tackling the root causes of child and whānau poverty in Aotearoa New Zealand. The PMP has a long-term, experimental approach to systems change. Its participatory model allows ngā kaikōkiri and a supporting committee and team to jointly make decisions about strategy, resourcing, and grantmaking.

PMP is an expression of J R McKenzie Trust's three change strategies: strengthen collaboration and support collective action; support community innovation, voice, and leadership; and grow capacity to progress system-focused solutions.

Whakapapa – the journey of the Peter McKenzie Project

Sir John McKenzie established the J R McKenzie family trust in 1940, with a focus on social justice and equity that has endured to this day. In 1993, The Perpetual Trustees Substitute Company

wound up, leaving \$5 million for charitable purposes. Perpetual Trustees sought the J R McKenzie Trust's help to manage the funds, and Sir John McKenzie's grandson Peter McKenzie created the Jayar Charitable Trust in 1996 for this purpose. In 2000, funds began to be distributed and in 2011, Peter McKenzie proposed spending the funds down completely over 20 years on a single issue that would make a substantial difference to the lives of New Zealanders.

From this vision, in 2013 PMP was set up as a 20-year, spend down fund which had grown to \$11 million. To determine where the project should focus, a working group of Jayar Trustees undertook extensive research. The decision was made to focus on reducing the number of children living in poverty and hardship. The project was named in honour of Peter, who had passed away in 2012.

Over several years, the working group considered a range of possible approaches for the fund. The long-term nature of systemic change was acknowledged, along with the need to take risks and experiment.

In 2016, the working group

disbanded and a committee for PMP was appointed, including J R McKenzie Trust representatives, social entrepreneurs, academics, and activists with expertise in systems change and child poverty reduction. The PMP committee affirmed the focus on 'upstream' work – building healthier systems and creating the conditions for positive systemic change to occur.

“ The PMP committee affirmed the focus on 'upstream' work – building healthier systems and creating the conditions for positive systemic change to occur.

In 2017, with the fund at \$16 million, a public call was made for ideas to tackle the root causes of child and whānau poverty in Aotearoa New Zealand. More than 260 organisations submitted ideas, 15 were offered additional funding to scope further, and some of these submitted a refined proposal. In 2017, the first cohort of ngā kaikōkiri came on board, with more joining over time. In 2019, the first joint hui of ngā kaikōkiri was held, to build relationships and explore collaboration potential. Building on a wayfinding metaphor from one of PMP's partners, Tokona Te Raki, PMP became envisioned as a 'flotilla' of waka/boats navigating the ocean towards a shared vision.

How The Philanthropic Landscape key practices present in the work of The Peter McKenzie Project

Over time, PMP has developed practices that aspire to a more participatory style of philanthropy, involving power sharing and shared decision-making. This began with a paper that proposed ideas and ways forward. Initially there was some pushback from ngā kaikōkiri around potential funding implications and from committee

members around implications for decision-making. Time was taken for people to discuss what a more participatory approach could look like and to gain confidence in different ways of operating.

PMP Director, Lili Tuioi, recalls that when the participatory decision-making approach was first proposed, there was some nervousness across the Trust board, PMP committee, and ngā kaikōkiri. "I think for ngā kaikōkiri, they weren't sure what it would mean in terms of future funding; and for the committee, it was adjusting to a different idea in terms of control around decision-making". Moving forward has taken courage on all sides, and a gentle process of navigating how this might work in practice.

PMP's participatory and power sharing practices are still emerging and refining. They now include:

- **Unrestricted funding** – Funding is untagged, and groups are able to ask for more resourcing if needed.
- **Mahi Tahi** – Collaborative retreats to work through issues, set direction, and share learning. In 2021, the issue of sharing decision-making power over strategy, grantmaking, and resourcing became the sole focus of three joint meetings.
- **Shared decision-making** – A subgroup was established involving ngā kaikōkiri (five organisations) and two committee members, to undertake decision-making on behalf of PMP.
- **Participatory evaluation** – Ngā kaikōkiri are supported to capture their impact and learning in ways that work for them (video, verbally, written), through a developmental evaluation approach. A more participatory evaluation approach moves beyond what each project is achieving and learning, to interrogate

and learn together about some of the big questions everyone is facing. A collective theory of change over time may also eventuate.

- **Ako Fund** – Offering of small grants to ngā kaikōkiri so they can visit one another and attend other learning events.
- **Community of Practice** – An online community of practice was set up in 2020, providing opportunities for ngā kaikōkiri and others nationally and overseas to support each other and share knowledge.
- **Access to diverse expertise** – Through the flotilla approach, and through access to external experts on the committee and beyond, ngā kaikōkiri and the J R McKenzie Trust have access to considerable expertise.

Lili reflects that Mahi Tahi in particular is “one of the real artefacts of PMP, a real gem. The learning they gain are from peers that they trust, who they have a relationship with and share the same high-level vision with, is so valuable [...] When it works well, we are working together and making decisions about how to support each other in different spaces”.

PMP has learned about conditions needed for a more participatory, power-sharing approach to take flight. This includes:

- The development of shared values to operate from.
- High trust and commitment, as this approach requires additional time, energy, and resources.
- Taking time to get clarity on what is being proposed and implications for all involved.
- Listening deeply, to hear from everyone and surface different perspectives and concerns.

- A clear structure and transparency of purpose and process.
- Modelling of relational, participatory ways of being throughout the process, including leadership and facilitation.
- Fluid representation of ngā kaikōkiri in the decision-making group, as their capacity allows.

“ It’s about manaakitanga in its fullness, it’s about giving mana in different ways – listening, appreciating, and empathy.

Ultimately, equity and social justice is a product of how we behave and treat each other. Systems change is about changing ourselves and how we operate together. Practices that PMP is seeking to embed over time include: whakawhanaungatanga – making time and giving opportunities to connect, that allow people to bring all that they are to the space; reciprocity; and manaakitanga – looking after people well, which Lili reflects is not just about good hosting. “It’s about manaakitanga in its fullness, it’s about giving mana in different ways – listening, appreciating, and empathy”.

In principle, power sharing is often supported, but the reality is that it is time-consuming work and makes additional demands on all concerned. Lili reflects that PMP has had to carefully navigate the balance of “not putting too much additional responsibilities on ngā kaikōkiri, as their priority is to do their mahi. Sometimes it’s deciding when we need to lead and when to leave decision-making in their capable hands.” PMP will keep exploring ways to work differently to share power and elevate the whole as well as the parts of PMP, towards its vision, which has broadened over time from child poverty reduction to flourishing whānau.



TAPUWAE ROA
ka haruru te moana

Tapuwae Roa: An Indigenous, intergenerational lens to investing in impact

Tapuwae Roa kaupapa

Tapuwae Roa was established in 2004 through the Māori Fisheries Act, with a managed fund of \$20 million. The trust is committed to maintaining and growing this fund in perpetuity. The trust is part of Te Ohu Kai Moana Group Limited, and managed by a corporate trustee, which has a board of three directors. The trust's purpose is to “promote the sustenance of Māori identity; supporting and accelerating Māori social and economic development by providing strategic leadership in education, skills, and workforce development”.

Tapuwae Roa has impact goals that focus on future proofing the next generation, mentoring and governance training, and innovation and research. The desired impact of the trust is described through five key impact areas:

- Angitū: Māori succeeding as Māori; fostering Māori identity and values, Māori sovereignty, incorporating Māori values systems, and strengthening connection to whakapapa.
- Mātauranga: Thriving mātauranga Māori knowledge systems; exploring and applying innovations along with intergenerational transfer of knowledge.
- Rangatira: Future leaders armed with ancient wisdom; building skills and pathways for Māori in leadership to unleash the potential of Māori in leadership roles

- Tangaroa: Active and reciprocal relationships with Hinemoana and Tangaroa; with a thriving ocean supporting thriving peoples.
- Ōhanga: Economic emancipation; higher earning potential and financial resilience.

Tapuwae Roa uses impact investment, funding, and programming to achieve its goals. Advocacy is also a key strategic lever, where the trust shares evidence and learning to ‘de-risk’ investment by other parties into shared kaupapa. Mobilising more capital towards outcomes for Māori is a key change that the trust is looking to influence.

Whakapapa – the journey of Tapuwae Roa

Te Pūoho Kātene was appointed Kaihautū of Tapuwae Roa in 2020 and brought to the trust a background in impact investment and Indigenous leadership experience. Te Pūoho worked closely with the trust's directors to rethink the strategy of the trust, with a focus on articulating an intergenerational purpose and thinking differently about how to harness impact from the funds that the trust manages.

Te Pūoho reflects that “the board wanted to move towards maximising impact from every dollar that we have. We needed to take a step back and avoid only focusing on the tools we already had available to us. When all you have is a hammer, everything looks like

a nail” Te Pūoho reflects. “I hold fast to the whakatauaikī that money is like a kumara; its only value lies in its ability to feed people. Social and impact investment is a key pathway for Māori to leverage our hard-earned assets and resources to drive prosperity for our people.”

“ We needed to take a step back and avoid only focusing on the tools we already had available to us. When all you have is a hammer, everything looks like a nail.

Chair Kate Cherrington, reflects that in order for the trust “to move from being an entity that distributed scholarship and grants into something as dynamic as we have now that is an integrated, whole of a system that’s Māori-led and very principled, you have to be courageous. It would be quite easy to stay distributing grants. So it hasn’t come without its pain; but staying courageous and principled is important [as well as] being led by our impact statements and principles of practice that encompass being good kaitiaki of the fund, whakapapa, and embracing innovation”.

Tapuwae Roa developed a theory of change with clear impact areas that described a desired future state, with a distinct intergenerational lens. Te Pūoho reflects that “when you have lots of priorities, you have no priorities; so our theory of change helped us hone in on what the critical success factors are, and we now look for kaupapa that maximises these priorities. It’s not enough to have a 500-year plan unless you have the directions to get there”. The theory of change is now a key navigational tool for decision-making.

How The Philanthropic Landscape key practices present in the work of Tapuwae Roa

As Tapuwae Roa developed its new theory of change, Te Pūoho, and the trust directors re-evaluated how the financial base could be used to achieve the trust’s vision. The critical principle in this process was thinking about investment in ways that centre the cultural values of the trust and of Māori more broadly. Te Pūoho explains that “being good ancestors is a ubiquitous part of Aotearoa; it requires us to make a dollar for our grandchildren over a dollar for ourselves. So, just listening to existing [investment] best practice, without internalising it and making it organic to ourselves, that would be a disconnect with what our cultural values were [...] All of the funding we have under management needs to generate impact. We can’t have 96% of it being socially neutral just to generate a better investment return”.

Tapuwae Roa now takes systems and power-sharing approaches – identifying an issue, mapping out the systems at play, and working with communities and other key institutional stakeholders to reimagine how things could work better. Te Pūoho underlines that “change cannot be given to communities. We aren’t the agents of impact, it is with communities. We need to understand the power that we have as investors but know that we don’t own the impact [...] We need to bring our strengths together [and] having local champions is the way in which kaupapa succeed or not. Top down-approaches don’t work”.

Kate adds that the trust has to be proactive in finding investment

opportunities where it can best add value. “We have a very dynamic Māori community. We have to move in urban spaces, iwi spaces, different demographics, and we have to go gently. There is a skill in that, in being relational and at no point imposing. We can only share our kaupapa”.

“Change cannot be given to communities. We aren't the agents of impact, it is with communities. Top down-approaches don't work.

Tapuwae Roa now has a number of different levers for contributing to impact, which it can use with flexibility to maximise impact. These levers include granting partnerships, direct project delivery where the trust identifies a specific need or gap, using capital for impact investment, investing in research to build evidence about what works, and advocating to attract follow-on capital that can scale up impact of initiatives that Tapuwae Roa has seeded or developed. Determining what support is needed, and when, is done with flexibility – in collaboration with the trust's partners.

Te Pūoho shares two examples that speak to the trust's systemic mindset and flexible investment approach. The first example is where the trust was approached by an iwi in the north that had identified a need to create rangatahi pathways into the fishing industry. “We were able to come in and support that kaupapa with a philanthropic grant. We then looked at how we could systematise the pathway that they took, and their pastoral care approach, to share as a model for other

similar Māori communities around the country, while at the same time recruiting allies in the fisheries industry to help create a pathway for scaling”. The goal here is to create a “more systemic approach that can be shared to create a movement, rather than a single one-off programme”.

The second example is the National Māori in Governance Summit which was developed by Tapuwae Roa in response to an identified gap that aligned with its priorities for strengthening Māori leadership and governance. Te Pūoho shares that “there was no one offering anything of the magnitude, scope and intent that was needed to support Māori in governance. So rather than approaching others to [Indigenise] their offering, it was incumbent on us to create something and partner with people to deliver it”.

A focus on equity is woven across the strategy of Tapuwae Roa, exemplified by success indicators that include Māori succeeding as Māori and mātauranga Māori being applied alongside western knowledge systems. The trust also grapples with the same equity considerations that many other philanthropics have – particularly ensuring that access to Tapuwae Roa funding is fair while also prioritising kaupapa where the trust can add most value.

Te Pūoho explains that “in Māoridom, it is very easy to gravitate towards big, well-researched projects where people are doing really good things. We could choose to partner there, and probably contribute to a lot of good impact, but [those types of initiatives] are at the stage where that impact would probably exist without us. That is not

being authentic to what we are trying to achieve. We need to stay focused on how we can maximise impact from our capital and determine whose voices we need around the table to make sure we are doing that”.

“ We need to stay focused on how we can maximise impact from our capital and determine whose voices we need around the table to make sure we are doing that.

Looking forward, Te Pūoho is clear that philanthropic and investment approaches need to be better at operating in-step, rather than as separate ecosystems, in order to scale impact. “If we want to have scale, scale is capital hungry and philanthropic funding is not set up to fund things in perpetuity, so we need to understand how impact investment and philanthropy work together across different stages of the life cycle, to maximise the probability for success from a holistic value perspective”.

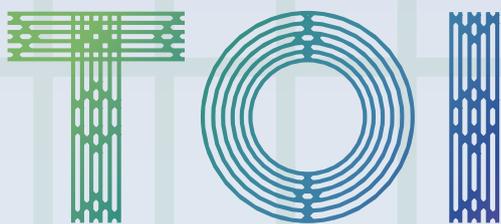
Kate agrees, sharing that “philanthropics have a view to create impact that is intergenerational, but the way it is set up doesn’t allow for that. It is still really transactional for short-term, quick-fix band-aid solutions in our communities. It isn’t sustainable or enacting mana motuhake. As a board, we needed to figure out how we [disrupt that]”. That disruption is coming via the establishment of a Māori founders venture capital fund, Rewa. The trust’s philanthropic funding is already

growing pathways for Māori enterprise to develop into investable propositions; and the new fund will provide a capacity to recruit capital and address the under investment in scaling of Māori enterprise. “We can show that Māori are highly entrepreneurial, and we need to channel that and give access into investment spaces that currently exclude them,” Te Pūoho shares.

The new fund will build partnerships with other venture capital investors, and Tapuwae Roa will continue to navigate this landscape in ways that are guided by te ao Māori values, prioritising partners with similar long-term horizons and aspirations for impact. Te Pūoho acknowledges that “the fund won’t only be Māori capital, but the capital it does attract will need to be patient, socially driven, and on board with the kaupapa”.

“ Philanthropics have a view to create impact that is intergenerational, but the way it is set up doesn’t allow for that. It is still really transactional for short-term, quick-fix band-aid solutions.

Te Pūoho reflects that “our long-term horizon gives us a different risk profile. If a view of success in the distant future is what we are targeting, then what we are doing now doesn’t necessarily matter. The horizon is where we need to keep focusing, not on each paddle stroke”. Kate agrees: “we need to be okay investing in outcomes that we may never see.”



FOUNDATION

Toi Foundation: A commitment to rangatiratanga and growing reciprocal and enduring partnerships with iwi

The Toi Foundation kaupapa

Toi Foundation (formerly TSB Community Trust) is one of twelve community trusts in Aotearoa New Zealand. It provides grant funding, impact investment, and other non-financial support to community organisations operating in the Taranaki region, investing just over \$22 million as grant funding in the 2022 financial year.

Toi Foundation's purpose is "to support our communities to build a thriving, inclusive, and equitable Taranaki". It is focused on "reducing economic and social disparities, funding where there is evidence of greatest need". The foundation has identified four key outcome areas: improved environment; increased access to opportunities; enhanced child and youth wellbeing; and rangatiratanga empowering Māori aspirations. For each of these outcome areas, Toi Foundation has developed a strategy to share with communities its priorities for impact.

Toi Foundation's funding activity is delivered through four channels. Alongside grassroots community funding, it has developed a strategic fund that centred on relational partnerships with communities, an innovation fund for seeding or scaling new ideas, and impact investing for both social/environmental impact and financial return.

Whakapapa – the journey of Toi Foundation

Toi Foundation has significantly evolved its practice over the last five years. This journey began with a review of evidence that identified a strategic opportunity to focus on shifting child and youth wellbeing indicators. This led to a strategic planning process that has ultimately shifted the foundation's approach from a "post-box" funder towards a strategic focus on equity, partnerships with tangata whenua, and more impactful models of investment into community outcomes.

This evolution has been organic and very clearly informed by relationships with the foundation's community partners, including iwi. In 2021, Toi Foundation refreshed its strategy and also changed its name and branding, seeking to more clearly reflect the foundation's values and aspirational vision for Taranaki. The vision is centred on the people of Taranaki, its land and prominent landmarks, history, culture, and the importance of partnership.

How The Philanthropic Landscape key practices present in the work of Toi Foundation

Equity is a key pou within the Toi Foundation strategy, and Chairperson Chris Ussher reflects that, during the most recent strategy refresh, trustees "looked carefully at our purpose and what we wanted to achieve, and we shifted to focus on a 'thriving and equitable Taranaki'. We needed to be clear about what we meant by equitable, which for us is looking at where there is the greatest need in our area".

The focus on equity is carried through into Toi Foundation's decision-making and monitoring, where key "equity indicators" have been identified. These allow the foundation to track whether its funding is aligned to areas of greatest need and to understand how these needs are shifting over time. Chris reflects that this "is where the rubber

hits the road in terms of how much you're committed to your strategy, when as trustees you're faced with decisions about a major community project that doesn't hit those equity indicators."

Increasingly, this focus on equity is leading Toi Foundation to take a long-term view about its role and contribution to impact. Chris acknowledges that, "through our funding approaches, we are hoping to have a more intergenerational impact".

“ One strategic outcome is about empowering Māori achievement – we actually use the word *rangatiratanga* in our strategy.

This intergenerational mindset has meant that Toi Foundation's practice has become more clearly about community inter-dependence, whereby Toi Foundation, community organisations, and iwi are working in relationship as a more deliberate ecosystem to affect systems change and achieve community aspirations. Getting to this point has seen Toi Foundation go on a significant journey to decolonise practice and build relationships with iwi and hapū. Chris shared that "one of our strategic outcomes is about empowering Māori achievement – we actually use the word *rangatiratanga* in our strategy [...] We've got a memorandum of understanding with six iwi. We've worked pretty hard to think about how we will work together".

Chief Executive, Maria Ramsay, describes the importance of these MOUs being about partnership, rather than transaction. “The key thing about these MOUs is that there is no funding linked to them, they are purely about how we work together and support each other. It really is a reciprocal relationship rather than a funder-applicant relationship [...] We wanted to form true, trusted relationships that are mana-enhancing for each other”.

Toi Foundation is now developing a theory of change in relation to its rangatiratanga strategy, co-designed with iwi, organisations, and individuals in Taranaki. The foundation was given permission to use a karakia as the basis of this theory of change and iwi partners are also using the rangatiratanga theory of change to inform their impact investment practice. “It has been co-designed and is not just for us, it is for everyone in Taranaki,” Maria reflects.

A think-piece board paper about participatory philanthropy was a key catalyst for Toi Foundation beginning to think even more deeply about power sharing. The foundation has since begun to explore ways of investing in impact through trusted partnerships with community. Poutama Initiative is a current pilot that is a key example of this approach. Based on Ford Foundation’s Build programme,

“ Toi Foundation is partnering with six organisations over four years to provide significant levels of untagged funding – funding that organisations use in a way that is completely self-determined.

Toi Foundation is partnering with six organisations over four years to provide significant levels of untagged funding i.e., funding that organisations use in a way that is completely self-determined.

In addition to the funding aspect of Poutama Initiative, Toi Foundation partnered with EY Tahi to offer organisational assessments and develop capacity and capability development roadmaps focused on strengthening each organisation in a range of areas. These include strategy, communications and marketing, and financial sustainability. Toi Foundation also facilitates the convening of these organisations as a cohort to share learning in ways that strengthen the community sector ecosystem.

Maria highlights that through the Poutama Initiative, Toi Foundation has developed trusted relationships with these partner organisations. “They are a willing to tell us what’s not working, and the relationship we have provides the safety for that”. Chris further underlines that

being able to provide certainty of funding over multiple years helps to ensure relationship longevity – which is fundamental to the ability of funders like Toi Foundation to authentically share power. “It’s about being able to say, ‘we want to work with you, we want it to be a genuine partnership’, and as part of that there needs to be a genuine long-term commitment on both sides”. From here, Toi Foundation is seeking legal advice around future possibilities for making much longer-term commitments to its strategic funding partners.

Another initiative that highlights Toi Foundation’s relational and collaborative approach to philanthropy is its ongoing partnership with the Department of the Prime Minister and Cabinet. This partnership looks to strengthen child wellbeing in the region through a focus on young parents from pre-pregnancy through to the first 1,000 days of their child’s lives. This work has been highly developmental, beginning with a needs analysis and working closely with key regional organisations in this space, and evolving through co-design of solutions with communities of young parents.

Maria reflects on the importance of Toi Foundation’s ecosystem approach – including having providers in the room, having central government involved from the outset and “most importantly, going out and engaging with the community, co-designing and listening

to the voice of [young parents]”. As this work progresses, Toi Foundation will have flexibility to use its innovation funding to “trial some ideas and look at getting a proof of concept that potentially could be picked up by central government”.

“ It is a more intensive approach to philanthropy that can’t be undertaken from behind a desk. You have to be going out, meeting people, and engaging. If you want to have enduring relationships, it starts well before you start talking about money.

One of Maria’s biggest learnings is that committing to power sharing, partnerships, and decolonising practice requires people. “It is a more intensive approach to philanthropy that can’t be undertaken from behind a desk. You have to be going out, meeting people, and engaging. If you want to have enduring relationships, it starts well before you start talking about money. You need time for whakawhanaungatanga, understanding where each of you is coming from, and maybe in twelve months something comes out of it. But you have to be patient and you need the people to do it”. Toi Foundation now has a whole team of people dedicated to social innovation engagement and partnerships. Maria believes that investing in these roles is essential to achieving better outcomes. “It’s not always best to be

lean and mean – we invest in our communities to develop their capacity and capability, and our board is prepared to invest in us to do the same”.

Across all of its work, Toi Foundation is committed to adaptability and learning – practices that Maria believes are both essential to, and enabled by, a relational approach. “We want to walk alongside organisations. We are learning a lot from them, and they learn from us. We don’t just expect a group to come back and tell us some outcomes in 12 months’ time. Now our practice is more about having conversations, realising that the outcomes the community want to achieve has led them in a different direction, and learning from that”.

Maria believes that continuing to listen to and engage with

communities means that Toi Foundation will remain much clearer on where it fits in the Taranaki ecosystem and how it can continue to best support regional impact. “We recognise the knowledge and wisdom that the community holds, so we are prepared to learn. We can help guide and provide backbone support, we can ask challenging questions, but we don’t have all the answers.”

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Trust Waikato: Prioritising community self-determination

Trust Waikato kaupapa

Trust Waikato is one of twelve community trusts in Aotearoa New Zealand, providing grant funding and impact investment to community organisations operating in the Waikato region. It awarded approximately \$25 million in community grants in the year ended March 2022.

The trust has a vision for “vibrant and resilient Waikato communities”, and has a strategic intent that outlines ten-year goals towards “achieving transformational change for people, families, communities, and places where the need is greatest”.

The trust has two priority impact areas – improving outcomes for high-need communities, including intergenerational wellbeing, rural resilience and connectivity, and outcomes for Māori; and strengthening the community sector, through investing in capacity and capability building, partnerships, collaboration, and innovation.

Whakapapa – the journey of Trust Waikato

Trust Waikato developed its current strategy in 2016 through a process of strategic review led by the board. The priority impact areas have remained constant since 2016, with four strategic pou added in 2020-2022 – equity, sustainability, impact, and Te Tiriti o Waitangi. Each pou has a commitment statement that outlines how the trust intends

to work alongside its communities to bring its priorities into action and its values into practice.

Chief Executive Dennis Turton shared that Trust Waikato has a long-term commitment to its strategy. It has informed its approach to activating strategy through a dynamic mix of data-based evidence and learning from deeper community engagement. “We have a more detailed understanding of regional need through commissioning of deprivation data analysis by Wellington-based firm, Dot Loves Data. At the same time, our staff and I are out in the community seeking to understand the need and discover insights that may not yet have been brought to light by the existing data.”

Dennis also credits his board of trustees for their commitment to understanding need and investing in ways that advance equity. “Our trustees kept asking the question, ‘how do we know our funding is benefiting those with the greatest need?’ That started the conversation which eventually led to the development of our strategic pou around equity, sustainability, Te Tiriti o Waitangi, and impact, significantly adding to the strength of our strategy and practice.” The trustees have strong ownership of the trust’s strategy and priorities. Dennis reflects that this has helped to build significant trust in the staff to work proactively and identify strategic funding opportunities that help realise Trust Waikato’s vision for impact.

How The Philanthropic Landscape key practices present in the work of Trust Waikato

Trust Waikato's commitment to its strategic pou has been foundational in shifting funding practice and prioritising support for initiatives that are community-led. The staff team sees empowering community self-determination as the trust's primary tool for working in an equity and Te Tiriti o Waitangi space. It has actively divested from initiatives and organisations that aren't embedded in the community. "We want to get behind local groups, not those that try to come in with a 'fix' and move out again," Dennis reflects. "It's proven not to work to parachute in, we've seen it over and over again. Instead, we establish where the need is and we have conversations with the community about what they want to do, and how we can best support them to deliver meaningful change."

“ We want to get behind local groups, not those that try to come in with a 'fix' and move out again. It's proven not to work to parachute in, we've seen it over and over again.

Over time, this emphasis on empowering community approaches has led the trust to more deeply consider its commitment to Māori and Te Tiriti o Waitangi. This is demonstrated by a cluster of marae that Trust Waikato is resourcing to determine and develop shared cultural, economic, and social development priorities, which it can eventually invest in activating. For Dennis, this example embodies the trust's approach to supporting tino rangatiratanga and mana whakahaere. "It's about investing in the strategies of hapū, iwi, marae, and other kaupapa Māori organisations, and if needed, also funding the process whereby tangata whenua determine what they need, first.

Our investment begins with time. We listen, we ask questions, and we talk together, building trust – but it's not about us trusting communities. It's about Māori trusting our organisation to be able to step into a te ao Māori space and be a genuine and enabling partner."

“ We listen, we ask questions, and we talk together, building trust – but it's not about us trusting communities. It's about Māori trusting our organisation to be able to step into a te ao Māori space and be a genuine and enabling partner.

Trust Waikato's partnership with K'aute Pasifika is another key example of the trust's focus on community self-determination. K'aute Pasifika had been through a process of asking the Waikato Pacific communities what they needed. It then developed a vision for a fale where communities could feel at home and have their cultural needs met, where children and families could be educated in a space supported by Pasifika values, and where wellness could be enabled through health services. K'aute Pasifika had struggled to get support from Council, until a \$2 million commitment from Trust Waikato enabled it to further develop its plans and ultimately leverage the funding it needed to build the fale. Dennis remarks that this influencing role is sometimes where the trust's impact is felt the strongest. "We remove a barrier by arming groups with some money to develop their own vision and plans, which then attracts others to come on board. We don't own the vision, the process or the impact; it's our privilege to have helped enable them to move closer to their goals and aspirations."

The trust's principle of community self-determination flows through into the space of understanding impact. Dennis is clear that "the people who create the impact, own that impact – it is not for a funder to say, 'look what we've achieved', as ultimately, we are just passing over money. By the same token, if communities own the impact, then they should be the ones who decide how they want to measure and understand that impact. Evaluation should not be driven by the expectations of funders or government; it should be about continuous strengthening of impact for organisations and communities." This principles-based approach to evaluation also recognises the importance of data sovereignty. "Behind every data point is a story about people, whānau and place; we have no right to own that data, we've been very insistent about that," Dennis reflects.

“ The people who create the impact, own that impact – it is not for a funder to say, 'look what we've achieved', as ultimately, we are just passing over money.

Trust Waikato recognises the value of having transactional grantmaking as part of its funding toolkit. However, from an evaluative perspective the trust understands that the cost of trying to measure the cumulative impact of many small or one-off grants can often outweigh the benefit – with significant grantee burden created for minimal visibility of impact. Instead, the trust prioritises its evaluative effort to focus on impact funding, where there are deeper, enduring relationships and greater opportunities to gain insights and learning.

The key evaluative interest area for Trust Waikato is understanding changes in

subjective wellbeing for the communities benefiting from the initiatives that it supports. An important component of the trust's impact funding offer is providing evaluation support via third party, Huber Social, who work with funded groups using a wellbeing impact measurement framework. Dennis comments that this has given the trust a much clearer picture of the outcomes it is supporting. "We now have evidence, for example, that our funding of a driver licencing programme enhanced subjective wellbeing through outcomes including reduced loneliness, greater connection to loved ones, and better opportunities for employment. Young people could see a pathway to a job, and that is an important story to be able to tell."

Through partnering with Huber Social, the trust is growing the evaluation capability of the communities it serves, while capturing evaluative insights that can be consolidated at a community, sector, and regional level to give the trust a clearer picture of its overall contribution to wellbeing. Dennis summarises that, "we are clearer on the impact our communities want to achieve, clearer on the impact that they are having, and clearer on what our role in supporting that is. That's what will guide our future decision-making and funding practice, and what will equip our partners to continue leading change in their communities".



Wayne Francis Charitable Trust and Leadership Lab: an ecosystem approach and 'showing up differently'

The kaupapa of Wayne Francis Charitable Trust and Leadership Lab

The Wayne Francis Charitable Trust is a family foundation based in Ōtautahi Christchurch, established by Wayne Francis in 1999. The trust's vision is for "all tamariki and rangatahi to develop to their full potential, make a successful transition to adulthood, and achieve lifelong health and well-being through positive youth development". The trust has never operated a contestable fund and instead develops opportunities to direct its financial and non-financial resources through relationship building. The trust primarily supports grassroots projects that have a 'systems change' focus and seek to address root causes of societal issues that impact young people.

A key partner to Wayne Francis Charitable Trust, Leadership Lab is a network of people that cluster together to work collectively on projects across Aotearoa New

Zealand that contribute to "thriving and equitable communities". Projects span sectors including education, health, and community, are multi-year, co-designed with communities, and involve funding partners from across local government, central government, and philanthropy.

Both Wayne Francis Charitable Trust and Leadership Lab were involved in the creation of leadership development programme, the Leadership in Communities (LinC) Project. Launched in 2014, the LinC Project was created in response to both the burn-out of grassroots community leaders in Christchurch post-earthquake, and the systemic inequity of access to leadership opportunities for Māori, Pasifika, rainbow communities, people with disabilities, and other communities that experience exclusion. Today, LinC has supported over 300 physical communities and communities of interest throughout Canterbury.

Puāwai was established in 2019

as a key programme component of LinC, offering an annual nine-month leadership experience for around 40 rangatahi aged 15-18 years. It is designed to build the next generation of community leaders, “connecting and developing a diverse network of peers, innovators, disruptors, and drivers [and] enabling them to contribute to their community”. The programme is co-designed with rangatahi, and involves individual and group coaching, small and whole rōpu meetings, and youth-led projects. It is actively rooted in a kaupapa Māori framework and is deliberate in its consideration of equity, inclusion, and intersectionality. As a kaupapa, Puāwai exemplifies many of the key themes in The Philanthropic Landscape – including equity and inclusion, a focus on systems change, shared decision-making and power sharing, and decolonising practice through a kaupapa Māori approach.

Whakapapa – the journey of LinC Puāwai

Wayne Francis Charitable Trust operates as a proactive relational funder forming relationships instead of having application forms. To support this approach and ensure board decision-making could be informed by positive youth development approaches, a youth advisory group was established in about 2005. In 2011, this advisory group worked with the trust to develop Positive Youth Development Aotearoa (PYDA), a framework for positive youth development approaches and

practices, designed collaboratively by researchers, youth development experts, and rangatahi. The PYDA framework was informed by national and international evidence of best practice as well as the experiences of rangatahi in Aotearoa New Zealand. Although the PYDA was developed as an internal document to guide the trust funding and decision-making, it has since become widely used across the youth development sector as a navigator for good practice and a training tool. The PYDA was refreshed in 2021 to reflect change in youth development practice in Aotearoa New Zealand. The Youth Development Champions Project (YDC) was launched concurrently to support training around the PYDA framework and enable skills sharing across a community of practice of youth development practitioners.

The process of developing the PYDA was critical in underpinning the trust’s relational way of working alongside its communities. Dr Chris Jansen, Director, Leadership Lab, reflects that both Wayne Francis Charitable Trust and Leadership Lab routinely adopt this way of working across their respective initiatives. It looks like “community providers and funders being on the level, designing stuff together, rather than [taking a typical] hierarchical process [to decision-making]...You’re around the table as equals trying to scope an issue and find solutions to usually quite complex social problems”.

While the relational approaches were in place before the 2011 Christchurch

earthquake, both Chris and Jenn Chowaniec (Wayne Francis Charitable Trust General Manager), reflect that the earthquake acted as an urgent accelerator to more collective, collaborative, and relational ways of working on intractable issues in the city. Chris reflects that the earthquake precipitated ways of working that were “counter-cultural to how most government funding – and quite a bit of the philanthropic funding – operated at the time”.

Jenn adds that other subsequent major events in the Ōtautahi Christchurch region – including the 2017 Port Hills fires, the 2019 Christchurch mosque attacks and COVID-19 – created a continual “urgent need for people to collaborate”, and a sense of shared experience that has helped to further breakdown elements of hierarchical power between funders and communities in the region. The local community and philanthropic sectors have learned to prioritise practices that centre on trust, responsiveness, and relationship. For Jenn, the unique levels of collaboration and partnership seen in initiatives like LinC and Puāwai are rooted in this whakapapa.

How The Philanthropic Landscape key practices present in the partnership of Wayne Francis Charitable Trust and Leadership Lab

For Wayne Francis Charitable Trust, the relational and power-sharing approach that underpins initiatives like Puāwai is a deliberate one rooted in ideas of equity and impact. Jenn shares that “we are very clear that we have some tools and resources, but we don’t have all the

knowledge and we are never the expert in the room on the issue we are discussing. We might have some views and opinions about it, but we have to learn to a greater extent about what it is we are talking about so that we can be part of the conversation about what to do next. That approach is pretty universal [for us].”

“ We are very clear that we have some tools and resources, but we don't have all the knowledge and we are never the expert in the room on the issue we are discussing.

Chris also underlines the importance of funders being part of – rather than just alongside – the ecosystem of stakeholders trying to impact systemic issues like the equity concerns underlying LinC and Puāwai. This looks like being around the table with communities to identify an issue, co-designing solutions, trialling different ways of doing things, learning about what works, and sticking around for long enough to see and understand the impact. For Chris, the collaborative mindset and relational approach are vital for leveraging the most value possible from the philanthropic potential. Moving forward, a key part of Leadership Lab’s work is championing this type of ecosystem approach in other regions and sectors. Leadership Lab has developed an approach called “Showing up differently” that guides this.

For funders wanting to engage in complex systems issues, Jenn underlines the importance and value of funders being “much more deeply involved in the conversation to understand the issue and what you can bring [to it]”. This means funders seeing themselves as part of the

system they're trying to influence; actively connecting and brokering opportunities, going out to "find the money, find the doors we want to knock on, open doors in advance, leverage the relationship that we have with other funders in different ways. We've got to stop thinking of the two sectors [community and funding] as entirely separate".

Although Wayne Francis Charitable Trust is no longer a financial contributor to Puāwai, the trust still sees itself as a key part of the Puāwai ecosystem, and actively contributes to the kaupapa through staff time, expertise, advocacy, and connections. Jenn notes that it is important to acknowledge what this work offers in terms of reciprocal ongoing value back to the trust – enabling knowledge gathering on key youth and regional issues, building community connections, and maintaining trusted relationships that support the Trust's work in other areas. A key consideration with this relational way of working – particularly when there is no longer any direct financial support attached – is ensuring that the relationship value is made tangible and communicated to trustees so that they continue to understand the value of staying highly engaged and maintaining the critical operational investment via staff time.

“Decolonising practice and “supporting the aspirations of mana whenua and tangata whenua is something that [philanthropy] needs to continue to progress in.”

Looking forward, Jenn and Chris both underline the important role of mana whenua and tangata whenua in co-design processes and the development of

ecosystem responses to systemic issues. Jenn reflects that decolonising practice and “supporting the aspirations of mana whenua and tangata whenua is something that [philanthropy] needs to continue to progress in.”

Chris reflects on his own personal journey, and Leadership Lab's organisational journey, around what it means to be tangata Tiriti. He shares that Leadership Lab now doesn't move forward on a project unless it is in partnership with mana whenua. As part of new work being developed by Leadership Lab with Queenstown and Lakes District Council, Chris shares that “we couldn't go in there without that [objective for partnership with mana whenua]. Our very first conversation there was with kaumatua. We need to be clear that this isn't tick box stuff, it is for real [...] The Tiriti o Waitangi framework is the first thing you develop, and co-design and everything else then needs to sit within that”.

Appendix I: Glossary

Ākonga Māori	Māori students, learners
Aotearoa	New Zealand
Fale	A house or building in the architecture of Samoa or Polynesia more broadly
First Nations	Indigenous Australians; Aboriginal and Torres Strait Islander peoples are the first peoples of Australia, meaning they were here for thousands of years prior to colonisation
Hapū	Kinship group, tribe, groups of families descended from a common ancestor
Hui	Gathering, meeting
Indigenisation	Process of transforming something to reflect Indigenous ways of knowing, seeing, being, and doing
Iwi	Extended kinship group, tribe, large group of people descended from a common ancestor and associated with a distinct territory
Kaikōkiri	Champions, mentors, advocates and community leaders; grantees
Kaitiaki	Trustee, minder, custodian, guardian, caregiver, steward
Karakia	Prayer, blessing, ritual chant
Kaupapa	Purpose, initiative, agenda, customary approach

Ākonga Māori	Māori students, learners
Kaupapa Māori	Māori approach or customary practice, incorporating the knowledge, skills, attitudes, and values of Māori society
Kōrero	Conversation, discussion
Mahi	Work, activity
Mahi tahi	To work together, collaborate, cooperate
Mana	The concept of mana is complex and in the context of young people speaks to essence, power, and agency to make decisions about things that affect them
Mana-enhancing partnerships	Mana-enhancing partnerships describe relationships where both parties (funder and ngā kaikōkiri) feel seen, understood, listened to, trusted, respected, and valued for who they are and what they bring into the relationship. Both partners have agency and voice. There is reciprocity in the partnership that uplifts everyone
Mana whakahaere	Governance, authority, jurisdiction, management, mandate, power, influence (Trust Waikato acknowledges Māori as tangata whenua and their mana as kaitiaki of te taiao and the people)
Mana whenua	Customary authority exercised by an iwi or hapū in an identified area
Manaakitanga	Hospitality, hosting, kindness, showing of respect

Ākonga Māori	Māori students, learners
Māoritanga	Māori culture, practices and beliefs, ways of being
Mātauranga	The reverberation of ancestral wisdom, intergenerational knowledge, wisdom, skill
Mauri	Mauri speaks to life force or vital essence, including the more intangible things that influence human systems, such as culture, emotional and spiritual connections
Ngā kaikōkiri	Champions, mentors, advocates, and community leaders; grantees
Pou	Pillar, post, supports
Puāwai	To bloom, blossom, come to fruition
Puku	Belly, centre
Pūtea	Funding, financing
Rangatahi	Young people, youth, younger generation
Rangatiratanga	Sovereignty, right to exercise authority, self-determination
Rohe	Region, area
Rōpū	Group of people, committee
Tamariki	Children, young
Tangaroa	Atua (god, deity, ancestor of influence), of the sea and fish

Ākonga Māori	Māori students, learners
Tangata Tiriti	People of the Treaty, referring to non-Māori people and organisations
Tangata whenua	Indigenous people, people born of the whenua, i.e. of the placenta and of the land where the people's ancestors have lived and where their placenta are buried
Te Ao Māori	The Māori world
Te Pae Tata, Te Pae Tawhiti	J R McKenzie's funding mechanisms draw their names from the following whakataukī (Māori proverb): Ko te pae tawhiti whāia kia tata, ko te pae tata whakamaua kia tīna. Seek to bring distant horizons closer, and sustain and maintain those that have arrived
Te taiao	Natural world, environment
Te Tiriti o Waitangi	The Treaty of Waitangi – a constitutional document that establishes and guides the relationship between the Crown in New Zealand (embodied by the government) and Māori
Taiohi	Young people, adolescents
Tika	Correct, true, just, fair
Tikanga	Procedures, customs, protocols and practices
Tino rangatiratanga	Self-determination, sovereignty, autonomy, self-government, control, power

Ākonga Māori	Māori students, learners
Treaty-based partnerships	Partnerships between Māori and non-Māori that give effect to the principles of the Treaty of Waitangi
Venture philanthropy	A value-add form of ‘high-engagement’ grantmaking in which both funding and a range of support services are delivered to selected community partners over a number of years
Wairuatanga	Spirituality, essence
Wānanga	Conference, forum, learning space
Whakapapa	Genealogy, lineage, descent, origins
Whakataukī	Māori proverb
Whakatinana	To make manifest, realise, embody
Whakawhanaungatanga	Process of establishing relationships, connections and relating well to others
Whānau	Extended family, family group

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

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

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