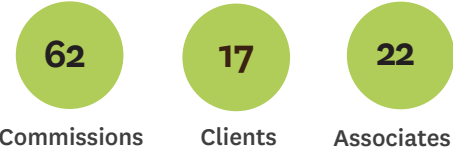


CSI worked closely with funders and community organisations nationwide to elevate impact and support learning. Our work spotlights amazing mahi, strengthens practice and supports systemic shifts, benefiting communities and the philanthropic ecosystem.

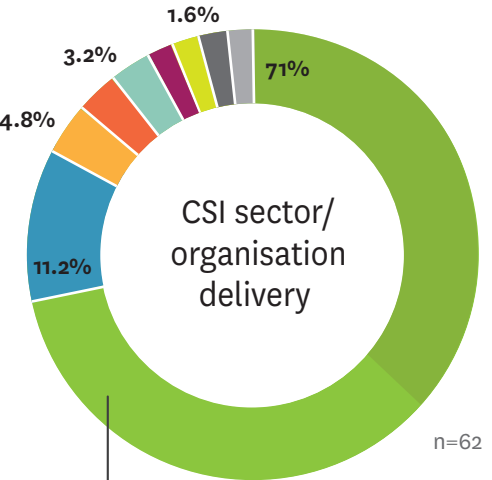


Our wide-ranging services included:

- **Evaluation and learning** through impact reports, creation of evaluation frameworks and learning processes.
- **Presenting** on Future Search, Understanding Impact, Strategy, Stepping into Advocacy and The Philanthropic Landscape at the Combined Community Trusts conference 2024.
- **Supporting philanthropic funders** to adopt more innovative, informed and intentional strategies and funding models.
- **Sharing thought provoking and practical insights** on diverse topics from wellbeing to honouring Te Tiriti, social return on investment and grant-seeking via webinars, podcasts, digital resources, blog posts and insights pieces from Te Pūaha o te Ako.
- **Facilitation** across diverse settings, including strategy activation, leadership events, and communities of practice.
- **Delivery of a leadership programme** supporting wāhine in the family violence sector to strengthen their confidence, wellbeing, and impact as leaders.

We supported diverse clients and sectors
A significant portion of our work was delivered with the support of Foundation North, including projects for the Foundation and its grantees. We also partnered with a wide range of other organisations across the sector, including philanthropic funders, trusts, NGOs, and national independent collectives.

CSI sector/organisation delivery by number of projects completed in 24/25 financial year



- Foundation North**
Te Pūaha o te Ako's open source sector support made up 41% of Foundation North commissions. These included eight Impact and Insights resources and twelve webinars as part of the Te Pūaha Talks online capability building series.
- Foundation North
 - Philanthropic
 - Community Trusts
 - Charitable Trusts
 - National independent collectives
 - Private sector
 - Non Governmental Organisations
 - Licensing Trusts
 - New Zealand Industry Training Organisations

Our work drove meaningful impact, strengthened capability, and improved the tracking and reporting of outcomes. Projects included:

- 4 Programme evaluations
- 4 MEL frameworks
- 5 Impact reports
- 3 Funding strategies or strategic vision reviews
- 3 Leadership development, collaboration or mentoring programmes
- 5 Conference presentations
- 3 Collaborative partnerships - co-funded or co-delivered commissions

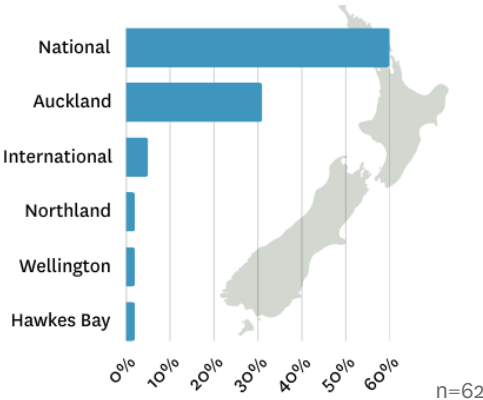
Case study: Mountains to Sea Charitable Trust

CSI was commissioned to support the Trust in activating its 2024-2027 strategy. Over four sessions, the Trust's Board, senior leadership and staff engaged in a collaborative process to refine their strategic direction and strengthen alignment across the organisation. The work helped clarify the Trust's role as a systems change organisation and gave confidence in its strategic direction. Outputs included a visual strategy poster articulating the Trust's vision, values and strategic pou; emerging aspirations for becoming a Tangata Tiriti organisation; and initial guidance for a Monitoring, Evaluation and Learning plan. The strategy activation also confirmed the relevance of the three strategic pou and highlighted practical ways to better deliver on the Trust's vision and deepen its commitment to equity and impact.

The majority of commissions focused on national impact, with strong representation in Auckland and Northland

Projects increasingly had a national focus, making up 60% this year, a sharp rise from 36% in 2023/4. Almost one third of projects were Auckland-based (31%), with Northland the third most common focus area (5%). Other projects were delivered across the North Island.

CSI client regions for projects completed in 24/25 financial year



Case study: Climate Action Aotearoa

Climate Action Aotearoa is catalysing systems-level change across the philanthropic sector, enabling funders and their communities to engage meaningfully with climate issues. Led by the Climate Action Working Group and two climate co-leads, the work activates five key levers of influence: governance, operations, grantmaking, investments, and strategy. At the heart of this kaupapa is a commitment to a Tika (Just) Transition, grounded in Te Tiriti o Waitangi, informed by evidence, and driven by a shared vision of equity, connection, and long-term impact. Quarterly hui bring together signatory members to reflect, connect, and strengthen their shared commitment to climate justice. These hui foster courageous conversations, collective learning, and alignment on what it means to fund with the future in mind. Together, they are re-imagining the role of funders as active partners in building a just, climate-resilient Aotearoa.

CSI client feedback highlights that the centre provides value through the expertise and professionalism of its associate network, deep knowledge of philanthropy and a collaborative approach.

CSI strategic pou

We work with funders and community partners to build powerful partnerships, strengthen practices and demonstrate impact effectively. Our services are based on five pou (pillars).

- strategy and innovation design
- effective funding practice
- impact and insights
- capability and capacity development
- leadership and culture.

Most of CSI's 62 commissions aligned with our Capacity & Capability Development and Impacts & Insights pou. A smaller proportion (5-7%) related to other pou. Many commissions spanned multiple pou, so totals exceed 100%.

65%

Capacity and
capability
development

40%

Impact
and insights

Thank you for bringing our stories to life in an impactful way. You are all experts in your field and we appreciate your professionalism and spirit of whanaungatanga and support. We have loved making magic with you. - Non-government organisation client

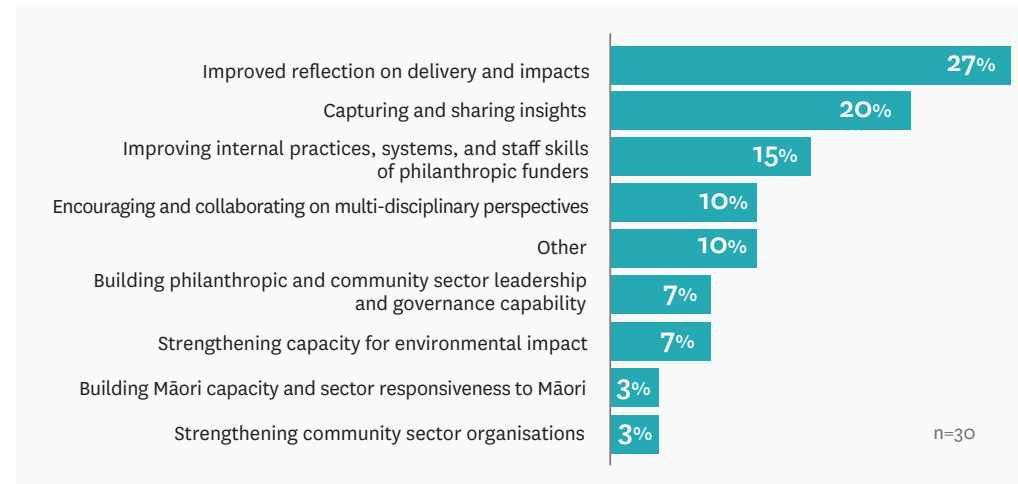
[The CSI Associates] provided the insight and expertise in funding that we needed to better design our funding strategy. They were a strong external voice in the room with our Board. - Community foundation client

CSI's key value has been in helping us clarify our strategy and supporting us with practical advice. Their guidance has been crucial in making sure [our organisation] is both financially sound and able to make a positive impact in the community. - Non-government organisation client)

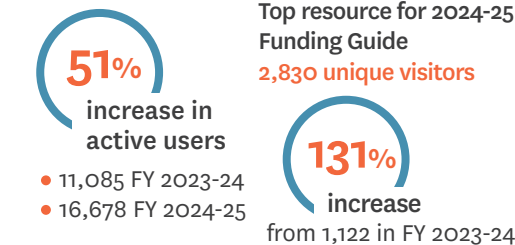
Client feedback

CSI's diverse expertise delivers wide-ranging outcomes for clients and communities

Client surveys identify the perceived most valuable outcomes of CSI support. Most common outcomes reported were their CSI supported project. The most common responses were improved reflection on delivery and impact (27%) and capturing and sharing insights (20%). These reflect CSI's core strengths in evaluation and supporting sector-wide learning. Among the 10% who selected 'other', comments pointed to strengthening personal and professional capability and support for strategy development as key areas of value.



Online engagement with our content rose sharply over 2024-25



[The CSI associates] really took the time to understand who we are, our work and why we do it. They met every milestone within the agreed time. They were culturally sensitive and rolled their work out with care and consideration to our strong faith and cultural backgrounds. - Non-government organisation client

Clients reflect on the outcomes that mattered most

In their open-text survey responses, clients described the difference their CSI-supported projects made. Feedback highlight the breadth of outcomes delivered across strategic, relational, and systems levels.

- Filling information gaps with research, insights, and guidance for next steps
- Improved clarity and articulation of achievement, value or impact
- Strengthened relationships, trust, and networks
- Ongoing assessment of impact and strategic alignment
- Clarity on strategic direction, purpose and approach to better meet community needs
- Strategic thinking and systems change

CSI is helping clients to progress their organisations

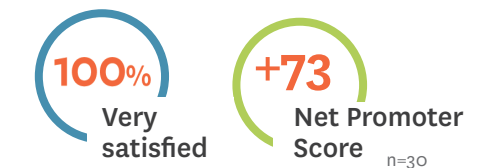
Client feedback shows strong agreement that CSI is helping to progress their organisations, with 90% reporting good (37%) or excellent (53%) progress.



Client reflections highlight how CSI's support helped progress their organisations beyond the project itself

- **Catalyst for progress** helped shift from standstill, gain momentum, or clarify direction.
- **External validation increased** confidence in strategy or approach.
- **Capability building** strengthened internal skills in advocacy, evaluation, and strategy.
- **Practical outputs** to secure funding, engage stakeholders, and share impact.
- **Visibility and traction** boosted profile, recognition, funding and partnerships.
- **Strategic alignment** supported long-term change alongside other internal or external work.

Feedback shows consistently high satisfaction and sector endorsement



CSI received an exceptional Net Promoter Score, with all respondents willing to recommend us. Over 70% gave a score of 9 or 10 out of 10, placing them in the 'promoter' category, and no respondents were detractors. This result compares very favorably to the consulting industry average of +60.