



## 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.

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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.

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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.