



ANNUAL REPORT 2018

REPORT FROM THE CHAIRMAN



Kia ora koutou, Warm Pacific Greetings

A thriving Generosity Ecosystem that embraces the “Power of Free” creates challenges and opportunities for Generosity NZ. Challenges because we must remain sustainable as a community business and opportunities to do things in new ways that can surprise, delight and hopefully engage that ecosystem.

Annual Chairperson reports are about the significant highlights for organisations and as an independent digital and advisory funding information resource we have much to report.

Our audited annual report has passed the scrutiny from our auditors and continues to build on our 2017 performance. So, fiscally we are building a sound financial base.

It signals our decision to utilise access to comprehensive data sets to be proactive in providing advisory services to specific sectors in the community. We are creating greater scope for access to existing funding information for wider community engagement in Aotearoa New Zealand through more intelligent information channels.

At a governance level we farewell board members Nigel Sanderson and Baden Vertongen who have made significant contributions to GNZ’s platform development and oversight of our governance and constitutional position. On behalf of the board I wish to acknowledge both as colleagues and for friendships formed during our time together.

This is also an opportunity to mention the continued support to the GNZ operations team and Brenda for her leadership of our organisation. Myself and my board colleagues, Tina Wehipeihana-Wilson, Janet Carson and Timoti Brown - yes, we are currently inviting on new board members – thank you all.

Together, we have reviewed our why and our how and we have a simple story to tell. We care, we are doing well and we are not alone in the challenges that face our community.

We are vitally aware of the many ways our communities continue to recreate themselves to respond to their changing environments, needs and structures. We exist in a post-treaty world for many iwi and remain in a grievance world for some. Our Pasifika peoples are developing structures that are

defining their citizenship of Aotearoa. So too are the new migrant and refugee communities coming to the table and defining their uniqueness and value to our social fabric.

The ever-changing dynamics of digital fundraising platforms such as GiveALittle, Boosted, PledgeMe et. al. offer an interesting insight into the nature of the Generosity Ecosystem as it evolves. The role of organisations like Generosity NZ in this environment also continues to evolve.

At the centre of Generosity NZ, and echoing the value to value concepts of running a community business Kohā leads us to a bigger vision – to use our mātauranga to create an ecosystem of giving by sharing what we know to help others to create, develop and deliver opportunities that help everyone thrive. It acts as GNZ’s driver, enabler and contributor to the generosity sector. Kohā urges us to continue to engage with new funders and to provide confidence to existing organisations, philanthropists, and public-private generosity systems.

I am mindful of comments by Hon Afioga Aupito William Sio MP, Minister for Pacific Peoples, as part of his address to the Pacific Aotearoa Summit reminding us that our Pacific (and Aotearoa) values are income for our future as we venture to be the best that we can be! Kohā is our value and our income for the Generosity Ecosystem.

We have signalled to our membership that changes to the membership structure are afoot and as we look forward, we will lean more heavily upon our membership. We recognise that the collective impact of our membership is part of our success and over the next year our members will see a lot more activity and calls to action.

A heartfelt thank you to our GNZ team who continue to evolve in capacity and expertise and extraordinary lead by our CE Brenda Smith. Thank you too to our suppliers, management, content, digital and financial advisors who have all contributed to a successful 2018.

Kia kaha.

Samuelu Sefuiva

Chair, Generosity NZ
November 2017

REPORT FROM THE CHIEF KITE FLYER



Kia Ora koutou katoa, another big year with big challenges and big rewards

Looking through this report the key theme appears to be the tremendous amount of change that has gone on over the last year.

The biggest milestone being the roll out of a new platform. The transition is not without its issues is not without its issues, so the work planned for the future is focused on those issues. The shift to a new platform has been long overdue and now ensures that our information is not subject to the risk of the platform failing.

With a new platform in place, Generosity NZ has begun work on building new resources for the sector. Over the next 12 – 18 months we will see these begin to roll out.

The shape of the team has also changed. Fixing the internal workings of the organisation can now be less of a focus while we turn our attention to engaging communities, students and other stakeholders. The new team is fit-for-purpose and is getting out and about.

New relationships has also been another theme for the last year. Generosity NZ has established formal relationships with Digital Wings, Connecting UP and we are very pleased to have our relationship with the Department of Internal Affairs re-established. These relationships serve to enhance our ability to serve our stakeholders and in return we hope the

same is true.

Every year is a tight squeeze to get our finances over the line. I’m happy to say that we have done that again this year. Every year, we meet new challenges that require us to dig deep and build our resilience.

Over the next few years we will be working to free up access to the very valuable information we hold. We recognise that our world is changing and people are looking for this kind of information in many different places. We also know there is an information overload out there so we will be looking to create collaborative tools that enable our communities, funders, teachers, students and others.

Creating new revenue streams to support free access will become the focus of the next while. Understanding what our customers, stakeholders, users and communities need will inform the development of new tools that support a healthy and thriving Generosity Ecosystem.

We look forward to working with you in the New Year.

Brenda Smith

Chief Executive, Generosity NZ
November 2017



REGIONAL WORKSHOPS

Now we have a Communications team in place, we have concentrated this year on engaging with stakeholders, communities and people who use our information. Several visits to regions around the country have shown us how valuable this is for keeping us informed about what is important to our stakeholders. Creating and maintaining interpersonal relationships with key people informs the development of our information services and creates better opportunities for everyone.



PASIFIKA FUNDING INFORMATION EVENING WELLINGTON

Generosity NZ in collaboration with the Pasifika Network was extremely proud to be a part of the very first 'Funding Information Evening' for Wellington's Pasifika communities, hosted by the Wellington City Council Pacific Advisory Group. There was an incredible turn out at the event from a variety of Pasifika community groups, clubs, charities, organisations and individuals. The night had attendees walk away with the inside scoop on funding hacks, truths and myths about funders, and a how-to-guide on creating a funding kit. The attendees were given the opportunity to put themselves in the shoes of the funder, by taking part in a mock funding application activity. The session triggered many thought-provoking conversations, and gave great insight into the funding application process. As well as interactive activities, this forum provided an opportunity for communities to network with our guest funders.



KĀPITI COAST FUNDING FORUM

Generosity NZ had the opportunity to attend Kāpiti Coast's latest Funding Forum. It was a great turnout from the community. The panel of speakers included organisations such as: Volunteer New Zealand, Victoria University of Wellington, NZ Navigator, J.R McKenzie Trust and Nikau Foundation. The conversation was guided by the million-dollar question 'how to diversify your income'. This topic stimulated some great conversation and ideas. It was great to see so much enthusiasm from the Kāpiti locals and to hear about some of the positive work that is taking place throughout the Kāpiti Coast District.



VISITING THE DEEP SOUTH

In April, Generosity NZ travelled to Invercargill, Queenstown, Arrowtown and Dunedin over 3 days where Georgia and Brenda spent a majority of their time taking training sessions with Council members and Library staff. The new platform was a hot topic for discussion, and we were keen to ensure that users can best utilise the givME, givUS and givER search tools. Generosity NZ were also invited to attend a Community Funding Information Session hosted by the Southland and Invercargill District Councils where we presented to a room full of individuals and community groups seeking funding advice.



VISITING THE FAR NORTH DISTRICT

In June 2018 Generosity NZ visited the Northland District. The Kaiwaka Memorial Hall was filled with locals interested in funding. Meeting people face-to-face made a huge difference in spreading the word about Generosity's search tools. Not only were Brenda and Stevie able to provide step-by-step guidance, they also had the chance to meet the librarians going out of their way to make sure their community members are fully equipped with funding knowledge. Sabine Weber-Beard was one of these librarians who is a givME and givUS champion. Sabine takes the time to ensure people in her community are fully informed about the new platform and will even go out of her way after hours to make sure the small community of Kaikohe has access to funding information.



KOKIRI SEAVIEW MARAE

Generosity New Zealand, alongside DIA and Korkiri Marae, were part of the 'Maori Provider Funding Workshop'. This workshop provided the opportunity to introduce our new platform to Māori organisations from around Wellington. As well as giving insights into our platform, we highlighted ways in which to be a good funding applicant. This sparked lots of good conversation. During this workshop, it was evident that there is a need for more cultural and comprehensive funding information. Looking to the future, Generosity NZ aims to be a part of these conversations. Below is some of the feedback we received:

- "Very informative korero from DIA and Generosity NZ. Gave me more confidence to apply and tips that I can use to enhance my application".
- "Great networks and guest speakers, learnt so much today".



WAIRARAPA

Generosity headed over the hill to visit our long-standing customers at REAP. This was a good meeting that resulted in valuable feedback from REAP staff members. Brenda and Stevie also visited the Masterton Library where we learned how Masterton Library distribute givME and givUS. They have established alternative access points so, besides the Library, people can access through both the local Runanga and a well-connected community organisation. This method of distribution of information improves the Library's mission to make information accessible.



MID-CANTERBURY

At the invitation of the South and Mid-Canterbury Community Trust, Generosity NZ went to Timaru and Ashburton to talk with funders about the funding research work done last year in Wellington. This trip was also an opportunity to talk to communities in the region and to work with Librarians who are keen to get our information in front of their customers.

AUCKLAND CHARTERED ACCOUNTANTS

Brenda attended a forum hosted by the Auckland Chartered Accountants for the Chief Financial Officers of community organisations. Much like Generosity NZ, many community groups have a virtual CFO and these people often work across a number of community organisations and are heavily involved in the process of applying for and reporting on funding.

A vigorous and very engaged audience got everyone to put their thinking caps on as questions flowed from the floor.

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The presenters were clear and easy to understand. They had the expertise and ability to explain how they work and also gave a clear picture that we also have a responsibility towards gaining a successful application. Ma Pango Ma Whero Ka oti te mahi!

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NEW PLATFORM

Developing a new platform to run givME, givUS and givER was long overdue. The old platform was not working very well and Generosity NZ had already disabled some of the functionality to take pressure off it.

We have made some big changes in the platform:

- More intuitive searching – the search function is now or/ instead of and/and. This means as you put in more criteria you narrow your search results. There is some fine tuning needed to this search function. Much of the feedback we received prior to the new search was that there was too much irrelevant information coming into the search results.
- It is responsive. Having to use the platform on a computer is now in the past. No matter what size screen you are using it will format itself to that screen.
- You log on. Our future work programme includes adding features that you can attach to your log in.
- The maximum number of results any one search will produce is 30. These results will be the most relevant to your search categories and will be listed in closing date order. A maximum of 30 results is a lot of information to download. Different searches will throw up a different set of results. The only way that we at Generosity NZ have been able to hit the 30 result limit is by not using any search criteria.



The shift away from a platform built in 1990 to a brand new platform was always going to present a challenge. Not just for Generosity NZ but also for our software developers and our stakeholders, the people who rely on our information.

Last year, the Board of Generosity NZ took the huge decision to invest in new software. The necessity to update the platform had been a part of the consciousness of our organisation for some time and was confirmed through the market research we have been conducting over the last three years.

The new platform was rolled out in February of this year. YES, there have been some hiccoughs. Our help desk has been kept very busy with questions about how to use the new platform and what to expect. Some issues people are having are due to the way the platform search has been changed and some are glitches in the new platform which we are ironing out as we go along.

We have developed new material to help everyone navigate the new system and have a set of FAQs on our website.

This transition has been huge! We would like to take this opportunity to thank all our customers, members, users and stakeholders for their patience. The new platform is far from being a final product as we continue to create an information service that aims to empower communities by providing the most convenient, relevant and up to date information.



2017 GNZ Business Giving Report

The following report offers an emerging picture that reflects back on the business sectors giving profile and informs the generosity ecosystem in New Zealand.

giver STATISTICS

The following information is from GNZ's givER database and covers the 2015-16 period. givER curates information from 120 businesses and investigates how, and why businesses give back to the community, and who benefits from their respective generosity.

83% OF GIVING CAME FROM BIG BUSINESSES
Out of the 120 businesses in givER 83% were classed as 'large' (100+ employees).

Which sectors got funded?



A SNAPSHOT OF BUSINESS GIVING CASE STORIES

Te Rōnango NGĀI TAHU
\$44.2m distributed to whanau in 2016 and provided governance, scholarships, commercial expertise and community initiatives

Microsoft
Through Microsoft's Technology for Good programme, approximately 2,500 non-profit and philanthropic organisations are recipients of product donations every year in New Zealand.

Fonterra
Fonterra's purpose is to be the world's most trusted source of dairy nutrition. In this context, that means being known as trusted to care for its communities.
More than NZ\$10 million is invested Fonterra Milk for Schools annually. The Fonterra Grass Roots Fund distributed over NZ\$600,000 to groups in New Zealand, and more than NZ\$1.5 million went to Living Water in 2016.

trademe Group Limited
TradeMe uses its widely-used portal to raise awareness and funds for the foundation's varied and many causes. Among their many initiatives, \$315,000 was raised in two years through auctioning off giant eggs decorated by artists.
TradeMe's relationship with the Wellington Zoo saw an event raise \$10,000 for the trust.
Cash sponsorship, advertisement, and pro-bono services, have contributed to Annual Christmas Party for Children with Special Needs held in Auckland, Wellington and Christchurch.
Kaibosh's Make a Meal in May (2016), the NZ Blood Service's Missing Type Campaign and the Christchurch Earthquake Support and Section Landcheck. TradeMe is currently partnering with the **One Percent Collective** and continues to support **Plunket** and **Kiwis for Kiwi**.

Payroll
Since inception, the iPayroll Giving programme has facilitated donations of over \$285,000.
As of April 2017, there are 62 IRD and iPayroll registered charities, a six-fold increase from its inception in 2010.

There will be more in-depth stories contained in the full 2017 Business Giving report to be published in June. Keep a look out on our website generosity.org.nz or email info@generosity.org.nz to order your copy.



Find us on



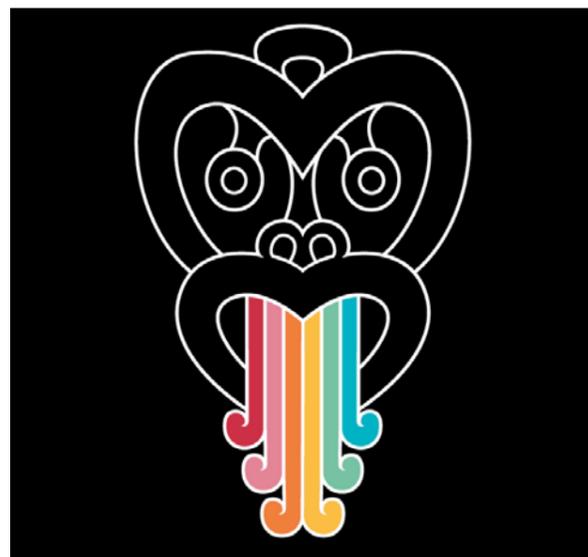
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BUSINESS GIVING REPORT III

Maea and the givINTEL team are working on the third Business Giving Report. This year, an enormous amount of work has gone into cleaning data and expanding the information capture. Building on the previous two reports, Generosity NZ is bringing more rigour to the analysis with the aim of building toward a very comprehensive report in the next few years. The by-product of this data enhancement will be captured in improved information for the givER search tools and guide us in the development of those tools.

LANGUAGE WEEKS

Over the last two years, Generosity NZ has been publishing posts on its Facebook site for each of the days of the weeks of the Pasifika language weeks and Māori language week. We have fabulous engagement from the communities through these posts which also serve to build our collateral in the different Island languages and in te reo Māori.



WHO'S IN THE TEAM

Generosity NZ runs a very small team. Most of the staff work 30 hours per week or less. Over the last year there have been a number of changes in the team but it remains tight and focussed on the challenges, tasks and opportunities ahead of us.

INTRODUCING GNZ 2018 STAFF

Let's start with our engine room. Collecting, organising and distributing our information all contribute to our core business. Everyone in the team contributes to this goal but there are some for whom it is their specific role.

MEL LANDRUM

Mel Landrum is our information team leader. She looks after our systems and works with our software developers. Over the years that Mel has been with us she has revealed a real knack for working with computer systems and this has proved invaluable to GNZ. Mel supports the information team and works to improve our systems.

ANDREW GRENFELL

Andrew Grenfell has been with us for four years now. He started as a volunteer and then we employed him to look after the information in givME. This is a huge job, there are thousands of records in givME and the nature of this information means they are regularly updated by the fund administrators.

VALENTINE MODERA.

The newest member of the information team is Valentine Modera. She has a dual role of looking after the information in givUS and providing administration support to Arklaire. Valentine hails from Belgium and we are discovering a lot of new and interesting skills and knowledge that she brings to her job.

MAEA HOHEPA

Maea Hohepa is our Research and Development Principal. The addition of Maea to our team has brought to Generosity NZ a robust approach to data, data collection and the analysis of that data. At the moment, Maea's main work is producing the Business Giving Report III. Alongside that she is developing data strategies and providing input into our platform development to ensure we are collecting the right data for the right purpose.

GNZ 2018 SUPPORT TEAM

A small team supports the running of Generosity NZ. They are:

ARKLAINE VAILEPA

Arklaine Vailepa is the Executive Assistant. She knows everything there is to know about Generosity NZ. As well as supporting Brenda, running her diary and making sure she gets her work done, Arklaine keeps a beady eye on everything else. She ensures that our help desk enquiries are answered, does all the Board support work, makes sure the AGM is run properly and looks after our internal systems such as our CRM, our hardware and the like.

XIANG MI

Xiang Mi started with us four years ago as a graduate accountant. Now, as she heads towards becoming a chartered accountant, Generosity NZ is the beneficiary. Xiang Mi has initiated a number of changes to our accounting practices and this year we have come through our audit with flying colours.

NOW TO OUR MARKETING, COMMUNICATIONS AND SALES TEAM.

STEVIE-JEAN GEAR

Stevie-Jean Gear started with us in March this year. Having arrived in Wellington from Rotorua, Stevie has been adjusting to a full and varied work programme. Utilising her strengths as a natural communicator, Stevie has been providing and delivering a lot of our workshop programme. Alongside Georgia, they have developed some new collateral and systems to ensure we are looking after everyone who needs access to our systems.

ALEXANDRA KANANGHINIS

Alexandra Kananghinis is the newest member of our Generosity NZ team and will be joining the marketing, communications and sales team. Over the last few months, Alexandra has been an intern with us while she completes her Communications degree at Massey University. Having had that time with Alexandra, we know she will bring a new energy to the team and we are happy to have her on board.

In the middle of the year, Meghan Fox and Natalie Pike joined us for one month through the international internship programme. Both were from America. They worked for givINTEL and with our marketing, communications and sales team. These programmes are helpful to organisations such as Generosity NZ. It enables us to interact with different ideas and ways of doing things at very little cost and great benefit. This is a programme in which we hope to continue to participate.

STAFF CHANGES

*Over the past year,
Generosity NZ said farewell
to several staff members;*

GEOFF HAYWARD

Geoff Hayward left us mid-year to follow a kaupapa he is extremely committed to. Up until then, he had been the Executive Assistant to Brenda. During his time with us, Geoff did a lot of work on internal systems and processes which Arklaine carries on today.

KEITH MORRIS

Keith Morris also left us in the middle of 2017. For several years, Keith had been the 'platform whisperer', coaxing the old platform to perform the tricks asked of it from us and our stakeholders. The decision to design a new platform gave Keith the impetus to explore new pastures.

JANETTE DOBLAS

Janette Doblás was key to establishing our research unit, givINTEL. Her work on the Wellington Funding Mapping Project was ground-breaking. Having climbed her mountain with us, she left us at the end of last year to further her research aspirations.

ATA TE KANAWA

Ata Te Kanawa left us at the end of 2017. It was largely Ata who lead out the new branding and the new brand Kohā, both of which we are very proud. She also re-designed our collateral and brought some class to our quarterly newsletter. A new website and combining our Facebook feeds are all part of Ata's legacy. Although we were sorry to see her go, she has definitely left her mark on us and it was clearly time for her to go on to the bigger and brighter things.



ALLIE THOMSEN

After completing a three-month internship with us, Allie Thomsen spent a year employed at Generosity NZ and has now left to fulfil her passion working with youth. Allie's contribution to the new platform has been tremendous.

JOANNE COROOK

Joanne Corook first came to GNZ as a volunteer. She moved into a position leading the information team and was extremely helpful with testing the new platform and working with our software developers. She has now moved on to a job closer to her Upper Hutt home.

LUCY WESTON-TAYLOR

In the 18 months that Lucy Weston-Taylor was with GNZ she played a key role in analysing data for the Business Giving Report, producing information for customers and working on the Wellington Funding Mapping Project. Lucy was an important part of the establishment of the givINTEL team.

GEORGIA KEIR

Georgia Keir came to Generosity NZ straight out of the Communications Degree at Massey. She spent the last year working for us while continuing her study for an Honours Degree. During her time with us, she set up some very good systems for the Communications team and created an inventory of our collateral. Having won a scholarship that will fund her to finish her Degree full time she has left us.



Like us on
Facebook

facebook.com/GenerosityNewZealand/

- With over 9000 followers, our Facebook page has been kept very busy over the year. We share an array of different material; funding information, community news and the story of our company. Facebook is a great tool to be able to interact with the wider community. We aim to keep our content fresh and informative by updating the page regularly, and ensuring our response times to comments and messages are prompt.
- For updates on new scholarships, closing dates, helpful tips when applying and all things funding go and LIKE our Facebook page.

FINANCIALS:



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For the GNZ 2018 Annual Report
(Full Financials)



generosity.org.nz