



generosity
NEW ZEALAND

***THE 2017 YEAR
OF GENEROSITY***



TĒNĀ KOUTOU KATOĀ



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Tangihia, tanghia ko te āhuatanga o aitua kua ngau kino mai ki a mātau, otirā ki a tātau katoa. Ko te whakaaro nui ki a rātau kia hoki mai ki te ao kikokiko ka tika!

Matariki i te pae. He tau hou. He tīmatatanga hou. Koia ko mātau e piki ake, e tū ake tonu i te tākiritanga o te ata. Tihei mauriora

”

This was a transformative year for Generosity NZ. The Board's challenge was to re-think our relevance and design a business model and platform to meet the changing environment of the generosity sector.

New Zealand is heavily populated by non-profit organisations who, over recent years, have seen a rapid shift towards integrated community sector and private public entities, a variety of corporate (business) social responsibility programmes and an emerging social (and youthful) enterprise market.

Early indications from the new Government is a desire to strengthen the non-profit sector in response to their priorities of social development, education, mental health and environment, and to grow the Māori economy.

Kohā is a recommended framework for GNZ to successfully guide the challenges of a collaborative impact model.

GNZ's re-designed Platform will kick off the New Year. This is the foundation stone of the organisation and will enable the development of new tools signalled in the 'Pathfinder' project.

Our goal is to secure partnered business relations with all territorial authorities, public information services and repeat customers, thereby improving revenue streams and maintaining GNZ's independence and sustainability.

The introduction of "givINTEL" - a collaboration of staff and accredited associates - offers a body of experts available to respond effectively to the changing generosity environment.

Our agenda for 2018 is simply to re-engage with legacy partners under our revised GNZ business framework, continue to grow joint ventures to advance GNZ reach and business capability and continue to refine the GNZ platform offering improved access points and online utilisation. Many thanks to the growing GNZ community, our hardworking team led by CE Brenda Smith and board colleagues for the positive 2017 result. The 2018 year will be one of further growth and action, implementing new ideas for the benefit of our diverse community.

Our social capital is contingent on the country's rich diversity, unique indigenous solutions and our agility in responding to contemporary issues through value-based frameworks such as Kohā.

Kia kaha

Samuelu Sefuiva

Chair, Generosity NZ
November 2017

FROM THE CHIEF EXECUTIVE



The 2017 year has been a watershed year for Generosity NZ. Our achievements have placed us in a strong position to deliver better tools and diversify our range and usability for 2018.

Utilising the unharnessed richness within our data, collected over 25 years has led to the establishment of a research unit, givINTEL. This year, givINTEL has produced a number of reports and fact sheets demonstrating that quality information can inform and enable the sector to improve its performance. These reports are highlighted later in this report. .

Another project, Pathfinder, set out to provide an evidence base for the development of future products and services. Taking a market research approach to ask critical questions regarding the viability and relevance of the Generosity NZ value proposition. It considered new business and revenue models, as well as identified prospective investors.

The recent work in Wellington with Pasifika communities has strengthened the connection and sense of value that can be realised through focused attention to the information Generosity NZ can generate to support these communities.

The most significant development of the year is the build of a new platform. This is nearly ready to launch and we look forward to seeing the benefits to all our users.

Our most valuable resource has been that of the human variety. Having people initially volunteer or take on internships progress into employment is a huge take out and pleasing result from the year. Accounting for 50% of current staff numbers, it's satisfying for us to uphold kohā as the underpinning value system of Generosity NZ.

Sadly, we've said 'ka kite' to a few of our team.

Keith Morris, who did all the maintenance and fixes on the old platform left to pursue other interests. He comes back from time to time to help us with bits and pieces.

Geoff Hayward was the rock that anchored us all. He left to work for TOAHNEST. He visits us now bearing his home-brewed beer.

Janette Doblus who embedded the research programme and givINTEL, and supported the team to improve the quality of our data has left to further her research career.

Ata Te Kanawa also recently left us. In her wake is her huge contribution to the brand, the stunning creative thread that exists on all of our work both internal and external. Everywhere we look we see Ata's work. It was through Ata that the kōrero of kohā arrived in our whare. We love it and continue to find new ways to embrace and introduce this value system into our work.

Ata continues to do discreet pieces of work for us and will further develop the kohā kōrero with us.

These people combined with our current team have delivered a massive legacy to Generosity NZ.

The culmination of all this work and the launch of a new platform is positive and frees us up to work on the things that add value to our massive data collections.

Completion of the Pathfinder maps the development programme for future offerings and informs much of the work going forward for Generosity NZ.

I'm confident 2018 will see new interest and growth.

Brenda Smith

Chief Executive, Generosity NZ
November 2017

Well before the first sunrise in 2017 peeped through the haze, GNZ already had a full complement dance card to shuffle its way through.

A medley of research projects from the aptly named givINTEL team not only upped GNZ's profile as a credible research hub but proved finding partners, a relatively easy warm up to bigger and brighter things to come.



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*Kohā ki te tangata kia ora,
kohā ki tōna ia ko ngā
whāinga ka tutuki kia ita!*

*Breath gives life to the
individuals, breath gives
substance to what is
desired – to achieve, to
hold fast!*

”



Photo Credit: Fonterra

BUSINESS GIVING II

Invitations were dispatched to a number of businesses inviting them to participate in the second edition of the Business Giving Report since 2015. The response was predictably positive as businesses signaled their enthusiasm to share stories of social responsibility and community engagement.

Presented as an overview of business giving across the country and based on data collected from 120 organisations, the glossy hard copy as well as e-file also included inspiring stories of business giving from seven, mostly large and high profile New Zealand companies.

Generosity NZ embarked upon this body of work aiming to produce five reports over the next five to seven years, all intended to build on each other to better inform the generosity sector of the contribution and attributes of business giving in New Zealand.

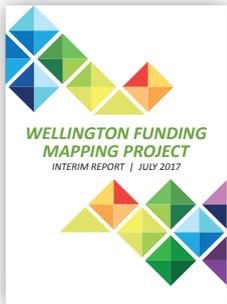
Following favourable reviews of this year's edition, plans are already underway for the 2018 edition of Business Giving III.

PACIFIC FUNDING FORUM

In a new initiative this year, GNZ teamed up with Ministry for Pacific Peoples, Central Pacific Collective, Pasifika Network and Pasefika Proud to facilitate a workshop for funders in the Wellington Region. The workshop was in response to finding that very few applications from Pacific communities were received by funders. The workshop was well attended and another is planned for 2018.

Generosity NZ's data for the givME search tool shows 118 scholarships targeted at Pacific People and administered by 37 funders.

GREATER WELLINGTON FUNDING REPORT



As an outcome to the first phase of the Wellington Funding Mapping Project, and made possible by a Nikau Foundation donor, a pilot research study was initiated by a group of funders who wanted a better understanding of the demand. Released in late July to an enthusiastic group of funders,

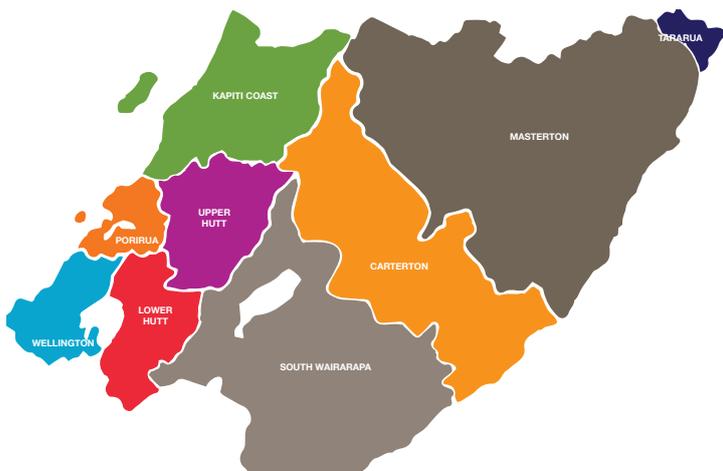
the inaugural report is the most detailed study of grant applications processed and approved by local councils and a select group of philanthropic trusts and foundations in the Wellington Region.

From the onset, the givINTEL team was cognisant of the wide breadth and scope of this piece of work which saw it developed in phases.

The hard copy and e-file featured an analysis of the grants allocated in 2014-2016, with a view to answering the following questions:

- Who requested and received funding?
- For how much?
- For what purpose?
- For which target beneficiaries?

It also shed light on the issues and challenges around collecting and classifying funding data. GNZ envisages other regions in New Zealand will be interested in having their own version of a study and report of this nature in 2018 and beyond.



SNAPSHOTS

In the age of infographics and insatiable appetites for information that can be easily accessed in a quick and timely manner, the GNZ givINTEL team produced a series of colourful and engaging vertical banners on Māori, Pacific Business and Greater Wellington Funding.

The GNZ product mostly aligned to all these groups is givUS and although the distribution of funds showed increases from previous years, there is still more advocacy needed to promote funds that are available and not applied for.

This is particularly the case with Māori and Pacific communities.

TERTIARY ENVIRONMENT

The tertiary landscape has changed significantly over the past two decades. Where once it was the domain of the bigger universities, wānanga and polytechnics, nowadays, more tertiary institutions have either merged while new niche institutions have been developed. Of a total of 21 tertiary institutions, more than half fit in the 'less than 10,000 EFTs category'. GNZ has moved to recognize tertiary charges that are based on the number of EFTs, which is the same model tertiary institutions are funded. This new approach replaces a former model that only catered to bands up to 4000 and above.

A TRIO OF CONFERENCES IN AS MANY WEEKS

The beginning of May saw three conferences hosted by philanthropic organisations based in Wellington.



Te Kāwai Toro, the Māori Advisory Committee of J R McKenzie Trust in conjunction with Te Wānanga o Raukawa hosted the inaugural Pacific Region IFIP conference in Otaki from May 8-9. Described by locals and international guests as a huge success, the conference came on the back of Te Kāwai Toro receiving the International Funders for Indigenous Peoples (IFIP) award which recognized J R McKenzie Trust's philanthropic practices. Their funding support to Māori enterprises increased from 3% in 2003 to 43%, and in 2014.



Philanthropy NZ's bi annual conference is always a big ticket

affair and the 2017 event held at Te Papa was no exception.

Many international guests attending IFIP simply stayed on and took in more of the broad range of key note speakers and local hospitality. GNZ is grateful to have had the opportunity to share its givINTEL research work with some of the 300 strong attendees.



The FINZ Annual Conference headed to Queenstown in early May for their premier learning event for fundraisers and charity and community sector leaders.

GNZ acknowledges the sudden passing of former FINZ CE David Irving. Belated wishes of sympathy are extended to FINZ staff, David's wife Sue, his children, grandchildren, extended family, and friends.



NEW PLATFORM

After more than a decade of red flags, subsequent plans and a robust funding application, followed by a market validation report in 2015 and preliminary scoping in 2016, 2017 would finally see work begin on building a new platform.

Rabid Technologies were engaged and are continuing to work with GNZ staff towards a go-live date in the early New Year.

This body of work has required constant monitoring of development, checking and cross checking for bugs while discovering new challenges. Such is the nature of expecting technology to work better and faster. It has also called for our large community of customers and stakeholders to be very considerate and patient. For that GNZ is wholly grateful.

REGIONAL VISITS

To ensure the day to day business of Local Authority customers and their users are accessing GNZ products easily and regularly, CE Brenda Smith and GNZ Communications Advisor Allie Thomsen embarked on several visits to regions during 2017.

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What I've found from our visits is that connecting with our users informs us of their experiences on what we are doing and how we could do it better. The bit I enjoy is people are usually surprised and grateful for how easy it is to use our search tools and the level of funding that's available, says Allie.

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As well as being an integral part of the GNZ brand, Kohā is the underpinning value system Generosity NZ adopted in 2015, we've developed collateral such as cards and complimentary notes and named our boardroom in its honour.

In 2017 and into 2018, GNZ will roll out a campaign that embraces being the kaitiaki of Kohā - the body that looks after the brand and shares its values and

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concepts. These were included in the Business Giving II Report to a business audience that is always seeking bold and impactful mission statements.

GNZ is considering initiatives for the near and long term future that will be built around breathing life (hā) into individuals and/or organisations, while enabling, enhancing and giving substance and sustenance to.

STAFF – HIGHLIGHTS / PROFILES



Allie Thomsen



Ata Te Kanawa



Mel Landrum



Arklaine Vailepa



Janette Doblal



Andrew Grenfell



Joanne Carook



Lucy Weston-Taylor



Xiang Mi

There's been a number of staff changes in 2017. Notably Programmer Keith Morris left in June after 10+ years at GNZ to enjoy spending more time with his young children, a change of scenery and a rest from the daily commute from Upper Hutt.

PA Geoff Haywood also left after 12 months and headed to another NFP organisation, Te Oha NEST.

After joining GNZ midway through 2014, Communications and Marketing Manager Ata Te Kanawa has had a gradual departure from GNZ, reducing from 5 days to 4 day weeks, with a day a week until the end of the year.

At the same farewell function, givINTEL team leader, Janette Doblal also left to take on a specialist research position in the private building sector.

Staff who have been welcomed on board to the givINTEL team this year include Lucy Weston-Taylor and Joanne Carook who began as a volunteer to GNZ.

Arklaine Vailepa, initially a volunteer, moved into Geoff Haywood's former position. Former intern Mel Landrum took up an employment position in late October. Likewise, Massey University Communications graduate, and 2016 GNZ intern, Allie Thomsen was appointed Communications Adviser in February.

FINANCIALS:

The 2017 Financial Year has built on the surplus of the previous year. Changes to revenue reflect the changing environment with government now fully disengaged with providing this information to the sector, we have known for some time that new streams of revenue need to be developed for the ongoing sustainability of Generosity NZ and the services we provide.

The establishment of new services related to our information collections including the research unit givINTEL are beginning to show up in the revenue line.

Our retained earnings are growing, this reflects on several aspects of the organisations vision and operations. Firstly, we run a very tight ship while prudently operating a culture of kohā. The board has focused the financial reporting on creating greater visibility on equity and forecasting which has enabled bolder decision-making and resulted in the investment in assets such as the new search platform. Our virtual Chief Financial Officer team at MTM combined with solid in-house financial capability have all contributed to a well-managed financial year.

Our biggest issue in reporting our finances is the liability reported from income in advance. Our obligations with regard to income in advance are nil however, we acknowledge that we must comply with accounting standards and our auditors are rigorous in testing this. Reporting income in advance as a liability does however skew the focus on the organisation's solvency.

You will see that the investment in a new platform is currently held in prepayments and, once it is live, it will be moved to the asset line and depreciated from there. The investment in a new platform breathes new life into the offerings Generosity NZ has and, with more advanced technologies we are well placed to continue to develop the platform.

Our non-financial reporting is based purely on access. Generally we are happy with the numbers of visits we get to our website, on average we receive just under 1 million hits per month. With over 9000 Facebook followers who engage with our posts on average around 2 000 times per post I think we can say there is a need for our presence and we have good engagement. With the imminent launch of the new platform we expect our ability to measure our non-financial performance will improve.



SCAN THE QR CODE

For the GNZ 2017 Annual Report
(Full Financials)