

## Our workplan 2022-2023

This document summarises Philanthropy New Zealand | Tōpūtanga Tuku Aroha o Aotearoa's activity from July 1<sup>st</sup> 2022 to June 30<sup>th</sup> 2023.

This plan progresses our purpose to grow effective giving as outlined in our 2020-2023 [strategic framework](#). We deliver on our purpose through:

- Supporting better giving
- Inspiring more giving
- Building a stronger sector

### Key activity

- We have gone live with **Match | Te Puna Taurite**, an innovative service with a vision of a more accessible, collaborative and equitable funding system. It will enable easier connection between the demand for and supply of philanthropic funds. As we enter the 2022-2023 year we are onboarding a small number of users to test for bugs and get feedback while we continue to develop the service's features. By the year's end we're looking that the service has thousands in its community. We're grateful for the members who have supported this initiative through providing seed funding and advice and who are our early adopters! Read more on [www.match.org.nz](http://www.match.org.nz)
- We will continue to implement **Ki te Hoe, a capability building framework** supporting funders to better understand Te Ao Māori, engage with Māori and iwi and support Māori aspiration. We'll do this by running events and providing information. We'll start the second wānanga series, for trustees, family members and senior managers, in early 2023. Ki te Hoe is a partnership between PNZ and Haimona Waititi and Kate Frykberg from Tūmanako Consulting. Read more here <https://philanthropy.org.nz/ki-te-hoe>.
- A highlight of our **professional development programme** is the new grantmaking training Funding Fundamentals. This has a uniquely Aotearoa New Zealand focus and will acknowledge the diversity of the sector by covering multiple funding approaches. Largely online, there will also be a face-to-face workshop in Auckland later this year. Read more here: <https://philanthropy.org.nz/funding-fundamentals>. We're looking for agile ways to offer governance training for our trustee members and are partnering with

the Institute of Directors to provide their non-profit governance training at a 20% discount to PNZ members. There is an online self-paced option available and a face-to-face option is likely to be held in November based on demand. Read more [here](#). In 2023 we will be developing our professional development offering for experienced practitioners.

- We are excited about **bringing our members together** more face-to-face this year than we've been able to since Covid arrived in New Zealand in early 2020. A highlight is the planned gathering of funder networks (youth, family, climate action, arts, education) in Auckland in late 2022. Details will be published on our website. We're also looking forward to bringing together regional networks in Wellington and Auckland face-to-face, and putting on some additional events over the next 12 months to support you to network, learn, share and collaborate.
- We'll be **reviewing our strategic approach**, given our strategic framework runs 2020-2023. As part of this we'll be touching base with our members to get input into our priorities and focus areas in coming years. We always love this exercise which is critically important to ensuring we continue delivering relevant services to support your giving.
- We'll continue to **help our members**. A key role we play is answering your queries, connecting you up with others in our membership who are like-minded or undertaking similar work, or pointing you in the direction of other specialists who can help or sources of information. As well as being at the end of the phone, email or sitting across a table from you, we run fora like the closed Facebook group for funders where you can chat with other members; and the Members' Hub, where you can access a wide range of resources. Get in contact with any of the [PNZ team](#) at any time.
- Our **Youth in Philanthropy** group will continue to support young people in the sector and also contribute youth voice to decision making. They'll be involved in various PNZ activities (like the youth funders network and the Philanthropy Summit), as well as running their own projects (like Ako, a network scheme). Thanks to the Wayne Francis Charitable Trust for their financial support for this work. <https://philanthropy.org.nz/our-team/#Youth-Advisory-Group>
- We'll continue to **provide you with information that makes your job easier**. Our weekly e-newsletter Giving Matters is a great resource that informs you about government consultations, policy direction; the release of relevant statistics; tells you about relevant events; shares member stories; and contains thought leadership. We'll continue to produce magazine Philanthropy

News as a high quality resource full of case studies, inspiration, reflection and learnings on the most important topics for our sector to be focussed on.

- We're **stepping up our climate action support** for our members. We're publishing resources on our website, carefully co-designing a revamped Climate Action Funders Network, and running seminars of interest to the wider membership. We'll be looking at what else we need to do for funders to help their mission to strengthen their climate action – both through looking at their own operations and what and how they fund community groups. Read more here <https://philanthropy.org.nz/climate-action>.
- We will **engage with the Government's policy and legislative programme**, creating channels for the representation of member issues, raising awareness around the role of philanthropy, and convening groups of interest on issues such as modernisation of the Charities Act, affordable housing, climate change, education and social sector commissioning. We will also develop an engagement plan and positions leading up to next year's election on issues that matter to our sector. We will continue to co-host the Philanthropy & Government Quarterly Forum with the Social Well-being Agency.
- We'll **promote and contribute where we can to research that seeks to understand the scale and type of philanthropy and giving in Aotearoa**, produce information sheets on topical issues, and share emerging data. Further sponsorship may be secured to create fuller case-studies on our members' learning about impact investment.
- We'll continue to **represent and advocate for philanthropy and grantmaking in a number of fora**. These include PNZ membership of the Department of Internal Affairs Sector User Group; being on an advisory group for the Minister of the Community and Voluntary Sector; and being on the steering and challenge group for the Department of Internal Affairs project: Kia Tipu, He Tipua – Evolving the lottery grants system.
- We're super excited that we'll start planning for the next **Philanthropy Summit**. We'll hold the next summit in late 2023 so watch this space for a date, a theme, and all the other good stuff being rolled out in coming months. We know our membership are excited at our decision to move from having summits every two years, to bringing together the sector for an annual conversation.

## Our enablers

- At a governance and operational level we continue to go on our own Ki te Hoe journey to **build our cultural capability**. Strengthening a reciprocal relationship with mana whenua Te Āti Awa is a key part of this, including having a seat for the iwi on our Board. At a team level, staff continue to learn te reo Māori and take advantage of other opportunities to increase their knowledge of te Ao Māori.
- This year we will undertake an **operational review of the organisation**. We've grown and changed considerably in recent years. It's time to have a look at how we've adapted to the new services we offer, our expanded offering to members, how our systems are coping. We'll look at how we've responded to changes in the external environment, and are anticipating future trends.

## Thank you

A lot of people help us to keep delivering services, information and help to our members and stakeholders, and support us to promote their work and advocate for positive change.

I'd like to say thank you to our platinum sponsors, [Macquarie](#) and [Perpetual Guardian](#), and to our champion members [Wel Energy](#), the [Todd Foundation](#), the [JR McKenzie Trust](#) and the [Wayne Francis Charitable Trust](#).

We'd like to acknowledge the Community Trusts of New Zealand for their substantial contribution to our research and policy work. You can see a list of our financial supporters [here](#).

We're grateful for the financial support for Match | Te Puna Taurite, particularly from premier funder Weave. You can view the funders of Match | Te Puna Taurite [here](#).

We'd like to thank the many members who engage with us, share their learnings and successes with us and the wider sector. We are looking forward to working with you in 2022-2023 to inspire more and better giving and keep the philanthropic and grantmaking sector strong.