



Annual Report

Growing effective giving

2021–2022



**Philanthropy
New Zealand**

Tōpūtanga Tuku Aroha o Aotearoa

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From the Board Chair

Tēnā koutou

An unpredictable external environment dominated 2021–2022 for Philanthropy New Zealand | Tōpūtanga Tuku Aroha o Aotearoa (PNZ) as the impact of Covid on communities, funders and more generally the public persisted.

We focused mostly on developing our online activity to deliver on our purpose of growing effective giving – supporting better giving, inspiring more giving and building a stronger sector.

There were many highlights amid the challenges. As I end my time on the Board, having served two terms, I particularly value our closer relationship with mana whenua, Te Āti Awa, who have guided us to better support our members in their aspirations to be good Tiriti partners.

When I started, there wasn't a research and policy function within PNZ. In 2021–2022 we saw our sector's engagement and reputation with Government strengthen as this function became embedded in our work.

The establishment of Match | Te Puna Taurite, a tool to support funders and community organisations in their efforts for a more equitable, accessible and collaborative funding sector, is an exciting system-level innovation which launched during the year.

The Membership Services team continued to deliver practical information, help, training and resources.

We ended the year in a healthy financial position with continued stability in our membership and a number of initiatives underway to support our ongoing sustainability.

Thank you to the PNZ team, so ably led by our Chief Executive, Sue McCabe, who continues to inspire our staff, members and the wider sector with her energetic and thoughtful leadership. In recent years we have worked carefully to develop a diverse and skilled Board and I thank them for their support and commitment to PNZ. I would also like to thank our valued sponsors, the Youth Advisory Group, Te Kāhui Pūmanawa and Tūmanako Consultants. Finally, my thanks and appreciation to our members who filled our events and our publications with their stories and learnings, passion, and innovative ideas. The 2021–2022 year highlighted your significant contribution to Aotearoa New Zealand's wellbeing, at a time when generosity was sorely needed.



A handwritten signature in black ink, appearing to read 'K. Whitney'.

Ngā mihi nui,
Ken Whitney,
Board Chair

From the Chief Executive

Tēnā koutou

The 2021–2022 year was again one that tested our agility and resilience in order to give of our best to serve our communities.

The team at PNZ was inspired by seeing the work of our funder and community members and other sector stakeholders to deliver funding, services and amplify the voices in areas of greatest need and opportunity.

It was a year of more lockdowns, the rise of Covid cases, and people juggling work and life happenings in a way I've never seen before. I'd like to thank the PNZ team for their commitment to delivering relevant information and services during another unpredictable year. Thanks to our Board for guiding and empowering us.

We love our caring sponsors, and also our members who are always looking to encourage more giving, to find ways to increase their impact, and collaborate to strengthen the sector.

We continued to deliver our usual services, albeit in a different way due to Covid, often evolving them in response to your feedback and changing needs. We provided you with information, training and help. We advocated for you to Government and told your stories to decision makers to raise awareness of your contribution.

We developed Match | Te Puna Taurite, in partnership with funders committed to positive change, and community organisations keen to share their insight and experience on ways to bring about better giving. This system-level tool adds to the considerable existing efforts of funders and community groups to continually evolve funding practices for the better.

The achievements of PNZ are the result of the contribution of our members who share our purpose to grow great giving. We appreciate all those who shared information and insight with the sector through us, asked for help or connections to support increasing their impact, guided us as to what funders are needing from their peak body, and were always so enjoyable to engage with.



A handwritten signature in black ink, appearing to read 'Sue McCabe'.

Ngā manaakitanga,
Sue McCabe,
Chief Executive

Our strategy

The purpose of Philanthropy New Zealand | Tōpūtanga Tuku Aroha o Aotearoa is to grow effective giving. We do this by:



*Supporting
better giving*



*Inspiring
more giving*



*Building a
stronger sector*

Highlights

Supporting better giving



We delivered 12 online webinars, workshops and Zoom sessions. They connected members, supported collaboration, shared sector expertise and built skills and knowledge. Topics included climate change, measuring impact, and responsible investing.

“

I have really appreciated the professional support from PNZ over the last three years in this role – you provide inspiration and connection to a wider field of practice.

PNZ MEMBER

”



We provided guidance to funders to better support Māori aspirations. The Ki te Hoe Capability Building Framework was viewed on average just over 200 times a month.

In partnership with Tūmanako Consultants, we ran a wānanga series for members seeking to grow their understanding of Te Ao Māori.

“

I think Ki te Hoe is an excellent piece of work. I really like the voyage concept. Whether funder or funded, we're all at some point on this voyage and there is some really practical stuff in there.

PNZ MEMBER

”

Inspiring more giving

During 2021–2022 we reached more people with our messages about the value of giving.



We were mentioned or quoted in:

2
news media stories per month.



Our weekly e-newsletter containing news, resources, latest research and thought leadership had an average open rate of

41.7%
up from
27.6%
the previous year.

2,451

group followers

on Facebook.



up from

2,350

the previous year.

1,832

group followers

on LinkedIn.



up from

1,521

the previous year.

“

Your weekly newsletter is VERY valuable. All of us in the team get it. We pull interesting items out of it onto the agenda for our team meetings and discuss.

PNZ MEMBER

”

Building a stronger sector



PNZ convened:

13 meetings

between sector representatives and government officials.

The engagement strengthened funding and policy programmes, enabled development of complementary approaches, and collaborations to be sparked.

“

So appreciated the thoughtful, well prepared presentations and reflections from our speakers. They certainly helped spark some gritty conversations amongst the breakout sessions.

GOVERNMENT AND PHILANTHROPY FORUM ATTENDEE

”



The Climate Action Funders' Network met three times. The network is a springboard for ideas, a hub of learning, and a place to find collaborators for initiatives.



We contributed to Government decision-making. We provided feedback on the Charities Act modernisation, both face to face with officials and through a written submission.

Project spotlight – Match | Te Puna Taurite



www.match.org.nz went live. This service helps both those seeking and those distributing philanthropic and grant funding. Its vision is a more equitable, accessible and collaborative funding system.

“

Every day we see the incredible mahi being done by charitable organisations and funders, and a service that connects us will enhance collaboration, provide visibility, and enable the delivery of more effective outcomes.

MATCH | TE PUNA TAURITE USER

”

Summarised accounts

Statement of Financial Performance

Philanthropy New Zealand

For the year ended 30 June 2022

	NOTES	2022 (\$)	2021 (\$)
Revenue			
Donations, fundraising and other similar revenue	1	728,760	318,893
Fees, subscriptions and other revenue from members	1	353,820	346,008
Revenue from providing goods or services	1	66,112	34,671
Interest, dividends and other investment revenue	1	4,739	4,397
Conference Income	1	-	199,065
Total Revenue		1,153,432	903,034
Expenses			
Volunteer and employee related costs	2	549,427	492,749
Costs related to providing goods or service	2	318,619	300,359
Other expenses	2	29,735	3,767
Conference Expenses	2	-	66,877
Total Expenses		897,781	863,752
Surplus/(Deficit) for the Year		255,651	39,282
<hr/>			
Surplus/(Deficit) for the Year including capital funding	2	255,651	39,282
Less capital funding received toward Match Te Puna Taurite	2	230,027	0
Operating Net Surplus/(Deficit)		25,624	39,282

Summarised accounts

Statement of Financial Position

Philanthropy New Zealand

For the year ended 30 June 2022

	NOTES	2022 (\$)	2021 (\$)
Assets			
Current Assets			
Bank accounts and cash	3	197,904	242,041
Debtors and prepayments	3	39,102	9,623
Term Deposits	3	278,515	276,455
Te Kāhui Pūmanawa (TKP)	8	-	63,418
Pasifka Funders' Network	9	-	-
Total Current Assets		515,521	591,537
Non-Current Assets			
Property, Plant and Equipment	5	5,780	2,463
Intangible Asset	5	230,027	-
Total Non-Current Assets		235,807	2,463
Total Assets		751,328	594,000
Liabilities			
Current Liabilities			
Creditors and accrued expenses	4	105,361	46,409
Employee costs payable	4	22,935	24,292
Unused donations and grants with conditions	4	-	92,500
Te Kāhui Pūmanawa (TKP)	8	-	63,418
Pasifka Funders' Network	9	-	-
Total Current Liabilities		128,296	226,619
Total Liabilities		128,296	226,619
Total Assets less Total Liabilities (Net Assets)		623,031	367,381
Accumulated Funds			
Accumulated surpluses or (deficits)*	6	550,608	296,020
Reserves	7	72,423	71,361
Total Accumulated Funds		623,031	367,381

The notes are available from the full financial statements on: philanthropy.org.nz/annual-reports-page

Thank you to our supporters

Organisational supporters

Thank you to our platinum sponsors



Thank you to our champion members



Thank you to the seed funders of Match | Te Puna Taurite

Premier funder



Hero funders



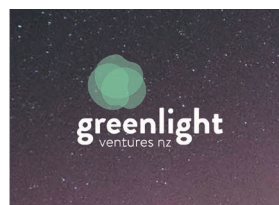
Thank you to our gold sponsor



Hero Supporting funders



Thank you to our silver sponsor



Thank you to our bronze sponsor



Thank you to our supporters

Thank you to

The Community Trusts of New Zealand for their financial support of our research and policy programme.

Mana whenua Te Āti Awa, particularly Whaea Pekaira Rei and Whaea Peggy Luke-Ngaheke, for their ongoing guidance and support.

Philanthropy New Zealand Board members

Ken Whitney, Terri Eggleton (BayTrust), Annette Culpan, Gemma Slack, Seumas Fantham (Todd Foundation), Whetū Campbell (Wellington Community Trust), Jeremy Faumuina, Tupe Solomon-Tanoa'i (Michael and Suzanne Borrin Foundation), Whaea Peggy Luke-Ngaheke (Te Āti Awa), and Leighton Evans (Rātā Foundation).

The Finance, Audit and Risk Committee

Terri Eggleton (BayTrust), Barry Baker (Grant Thornton), Gemma Slack, Leighton Evans (Rātā Foundation), Tupe Solomon-Tanoa'i (Michael and Suzanne Borrin Foundation) and Ken Whitney.

The Youth Advisory Group

Molly Allen, Gemma Slack, Michaela Latimer, Nicole Lin, Helen Anderson and Shreya Rao.

We would like to thank the following for their donated goods or services

Ernst & Young, Dentons Kensington Swan.

Philanthropy New Zealand | Tōpūtanga Tuku Aroha o Aotearoa is the peak body representing and supporting philanthropy and grantmaking in Aotearoa New Zealand.

Our members include trusts, foundations, individuals, friends of philanthropy, investors, local government, iwi and sector stakeholders. We have a membership category for community organisations.

As the hub of philanthropy in Aotearoa New Zealand, we provide training, share best practice, data and research, connect with Government and convene our members to enable collaboration.

We operate the Match | Te Puna Taurite service that connects philanthropists and grantmakers with each other and with charities, for a more equitable, accessible and collaborative funding system.

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