



Rātā
Foundation



STRENGTHENING THE SECTOR PROGRAMME REVIEW

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EMPOWERED TO THRIVE

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Executive Summary

The Rātā Foundation Strengthening the Sector (StS) policy, framework and implementation has been running since 2017. The programme is also called the Rātā capacity building programme. Rātā want to understand the value of the programme and its added benefit to Grantee Organisations. The StS Programme has three key areas: Capability, Capacity and Context:

- **Capability – Intended Outcome:** organisations are supported to develop knowledge, skills and confidence to deliver on their aims and to effectively manage their organisations.
- **Capacity – Intended Outcome:** organisations are supported to access organisational, professional and leadership development to enhance their effectiveness.
- **Context Intended Outcome:** organisations are able to operate within a supportive funding and policy context which strengthens and supports their effectiveness and growth.

The methods used in this research are semi-structured interviews with grantee organisations and a literature scan. The findings are summarised below.

The value or added benefit of the StS Programme to the grantee

The StS Programme makes an important contribution to the Not-for-Profit (NFP) organisations who have received grants and /or advice through this programme. This is particularly true where the grant and/or advice occurs at an important time in the NFPs development and they are ready to receive support from Rātā. For example, during a funding challenge or when the NFP is growing rapidly.

Sometimes the grant covered all of the costs of a capacity building initiative within the NFP. For example, hiring a facilitator to run the consultation process to enable two organisations to merge. Or paying for a staff member to investigate a social enterprise. Occasionally the grant enabled access to training and support such as accounting or marketing advice or governance mentoring.

For larger NFPs with central government funding, their day-to-day focus is necessarily on programme delivery and contract management. These NFPs appreciated the support of Rātā in the formative stages of their mahi, when they needed to update their systems, such as websites and customer databases. The goodwill created through this StS contribution remains years after they received the support.

Where the Rātā Foundation StS programme had supported less visible communities of need, these communities felt supported and heard. Even though, sometimes being a grant recipient had created new challenges for the NFP, such as more reporting.



The outcomes of the STS

Overall, the StS Programme contributes positively to the recipients of the programme by strengthening and supporting:

- Bicultural practice
- A focus on communities of need
- Organisational systems
- Continuous improvement
- Governance and leadership
- Professionalism.

In addition to these broad outcomes, there were many subtle and specific outcomes for the grantee organisations. These include visibility, confidence, courage, networks, new skills and effectiveness. The positive way Rātā Foundation works with NFPs to implement the StS Programme contributes to programme success. Rātā is seen by NFPs as engaging, trustworthy, relevant, clear and Treaty-aware. Rātā people are responsive, communicative and in touch with the realities of the NFP sector. They are aware of, and sensitive, to their role as grantmakers; and will navigate and influence others to increase impact.

Rātā people are sensitive to the timing of their support, being sure to check that an organisation is ready and able to participate in the StS Programme. They take care to follow the lead of the NFP, rather than imposing solutions. Consequently, the types of support offered is diverse, flexible and innovative.

The quality of the programme

Overall, the quality of the StS Programme is high and aligned with capacity building literature. The programme uses a framework that is based on best practice in grant making and is strengthened by the korowai of the Treaty of Waitangi. These two approaches ensure that the programme is built on solid foundations. Wherever possible Rātā Foundation has promoted reflective practices through impact studies, engagement and evaluation. These practices enable continuous improvement in the NFPs and build confidence, courage, energy and momentum amongst the staff of the NFPs. Consequently, they feel less isolated and more able to strategise and strive for solutions.



Challenges encountered by StS grantees

For most NFPs, funding for the long term is an important challenge. Some NFPs are well-advanced in their search for additional revenue streams, aided in part by initiatives under the StS Programme. For example, one NFP used the grant to redesign their programme as a social enterprise. While another launched a crowd funding campaign off the back of a new website and customer database funded by their StS grant. For others, this journey towards financial sustainability is just beginning. For example, one NFP used their grant to coordinate and collectivise many related NFPs to enable them to recruit paid staff for the first time. In this case Rātā collaborated with eight other funders to enable a two-year contract for these staff, making an ‘immediate and noticeable’ impact.

In some cases an NFP has not been able to fully embed a new initiative, like evaluation reporting, into their organisation. Partial uptake related to disruptions, such as the pandemic, poor contractor fit and/or workloads. New information systems were often needed and the process was complex and time-intensive. New systems needed to also provide evaluative information to an NFP about their progress toward outcomes, increasing complexity. For one large NFP, they felt constrained by the reporting formats of their central government funders. In contrast, the StS Programme reporting was described as flexible, well-structured and reasonable.

Learnings and recommendations

Overall, the StS Programme is wide-ranging and impactful. Grantee organisations have used the fund to lift their game, gain new knowledge, regroup, enhance systems and grow the reach of their programmes. The Context, Capacity and Capability framework gives shape and flexibility to how the programme is delivered and is consistent with best practice. The Rātā engagement style, together with the StS Programme, have established a firm foundation and mandate for Rātā to lead, navigate and extend their influence in the NFP sector. Rātā may wish to amplify their approach to capacity building, particularly at the contextual level. For example, by collaborating with other funders and activating their networks and influence with and on behalf of communities of need.

At the capacity and capability levels, the readiness of an organisation to take-up a StS grant will be a key to their success. Diagnostic tools to support this process may be helpful to compliment the face-to-face engagement mahi of Rātā people. Supporting NFPs to identify specialists that are a good fit for their organisation will continue to be important. For those NFPs needing to upgrade and integrate their information systems, support with scoping and assessing the needs and supporting implementation could be helpful. Keeping a focus on systems that support the tracking of outcomes will be necessary.

In conclusion, this successful capacity building programme has led to more effective outcomes for the communities of need in Rātā Foundation regions.



Introduction and setting the scene

Rātā Foundation, one of 12 Community Trusts across the country, funds not-for-profit (NFP) organisations working in its takiwā covering Tasman, Nelson, Marlborough, Kaikōura, Hurunui, Waimakariri, Christchurch, Selwyn districts and the Rēkohu / Wharekauri (Chatham Islands). Rātā strives for an equitable and sustainable society under the korowai of Te Tiriti o Waitangi to support positive intergenerational change.

Through its grant funding Rātā supports community organisations working to reduce barriers, providing support to those in need and acting to benefit our environment and climate by providing a community investment approach which provides options and flexibility and builds respectful relationships and partnerships with everyone they work with.

How Rātā works with organisations is guided by its Grant Making Philosophy:

- We believe in the rōpu/organisations we support and operate in a pono/high-trust model
- Whānaungatanga/relationships are key, and we are present in hapori/communities – kanohi ki te kanohi
- We are respectful, clear, and whakamana/empower organisations
- We strive to use an evidence base and be a learning organisation – me ako tonu
- We take a lead from the rōpu/organisations we serve about their knowledge of their hapori/community
- We whakanui/elevate and tell the stories of the rōpu/organisations we support
- We strengthen and manaaki/support rōpu/organisations to deliver better outcomes for the hāpori/community. We don't achieve outcomes on our own – we enable and work in partnership – Kotahitanga.

The Rātā Foundation's community investment approach has three funding programmes: Responsive, Proactive and Strategic and Innovation. The Proactive Programme aims:

- i. To engage with communities on shared priorities to guide investment
- ii. To effect positive social change by strengthening community organisations.



About the Strengthening the Sector (StS) Policy, framework and implementation

Rātā's Strengthening the Sector (StS) Policy, framework and implementation (also referred to as 'Rātā's capacity building programme') supports the Proactive Programmes. It has been running since 2017 and Rātā want to understand the value of the programme and its added benefit to grantee organisations.

In 2017, Rātā adopted an approach to strengthening the community sector. The approach has three key areas: Capability, Capacity and Context:

- Capability – Intended Outcome: organisations are supported to develop knowledge, skills and confidence to deliver on their aims and to effectively manage their organisations.
- Capacity – Intended Outcome: organisations are supported to access organisational, professional and leadership development to enhance their effectiveness.
- Context Intended Outcome: organisations are able to operate within a supportive funding and policy context which strengthens and supports their effectiveness and growth.

The guiding principles are:

- i. Making it contextual is about ensuring support is tailored to individual needs and helps the organisation address real-time challenges.
- ii. Making it continuous is about ensuring a long term view is taken over time with organisations.
- iii. Making it collective is about focusing on leadership at multiple levels, working with other funders and building collaborative capacity among non-profits and networks.



Context

Organisational readiness.
Organisational resources.
Funding environment.
Policy environment.

Capacity

Systems.
Resources.
Structures.

Capability

Skills.
Knowledge.
Confidence.



Purpose of research and method

The purpose of this research is to inform the review of Rātā's StS Programme, guided by these questions:

1. What is the value or added benefit of the programme to the grantee?
2. What difference has the programme made to the grantee and what are the reasons for this difference (value criteria)?
3. How important is the StS Programme to community organisations (dollars, years, timing, innovation/edgy, size and stage/context)?
4. What have been the outcomes of the STS (positive and negative)?
5. To what extent can they be attributed to the StS Programme (direct and indirect, specific and general)?
6. What is the quality of the programme?

The methods used in this research are semi-structured video interviews with grantee organisations, a document and literature scan, and sense making with Rātā staff. A purposive sampling method was used to select 15 grantee organisations and/or programme staff who had received grants within the last 2-3 years. The criteria used to select these interviewees was to ensure a spread of focus population and sector, with representation from all regions in the Rātā rohe. A spread of type of capacity also guided sample selection. A list of types of capacities is in Appendix 1 (Geo 1, date unknown, p. 7).

Rātā staff introduced the research to the grantee organisations through emails and/or phone calls. The researcher then sent an informed consent sheet to the grantee organisations to be interviewed. The information contained a suggested interview schedule. The questions were focused around the StS grant outcomes, benefits and challenges:

7. Tell me about the mahi you did with support from this grant?
8. What difference did the StS grant specifically make? Any examples? Benefits and outcomes?
9. What challenges did you encounter in the mahi funded by the grant?
10. What could Rātā Foundation do to help overcome these challenges?
11. Where too next with this type of mahi for you/your organisation? How are you embedding it?
12. Any other suggestions for Rātā about how they can best support capacity building?

Interviews were either video or phone based. Interviews were recorded and subsequently transcribed. An offer was made at the conclusion of the interview for the interviewee to follow up with any additional comments, if they wished.

A qualitative analysis was then undertaken, theming the transcripts across the three Rātā StS themes of contextual, capacity and capability building. These themes reflect the three principles of the StS Programme. This analysis was shared with Rātā staff for sensemaking and collaborative recommendation development. This information was triangulated against capacity building literature.

What does the literature say about Capacity Building?

This section summarises key trends in capacity building literature relevant to the Rātā StS Programme.

A paper by Bartczak (2013) gives an overview of the origins of the Rātā capacity building framework covering Capability, Capacity and Context. The framework was developed following an extensive consultation exercise with NFPs in North America. The researchers found that the majority of grant making organisations had some type of capacity building programme for NFPs. These might include leadership development, fundraising capacity, evaluation capacity, communications and technology (p.1). They found that there was ‘no one right way’ to allocate capacity building grants because every need was unique and the circumstances of the NFP were constantly changing.

Nonetheless, these researchers did identify some key features of an effective capacity building program. It should include programmes to support leadership development. The leadership of NFPs was one of the ‘most critical capacities of an NFP’ (Ibid, p.2). Another constant of an effective capacity building programme was the need for ‘a great amount of trust’ between the grant maker and the recipient.

Capacity building programmes should also include projects that focus on the role and influence of other funders. Grantmakers, leaders and Boards of grantee organisations are ‘powerful actors’ in the NFP sector. Therefore, programmes that focus on collective action and collective learning will be more effective and ‘more likely to stick’ (Ibid, p.3). Programmes that engage the emerging leaders in NFPs is one capacity building strategy being employed by some grantmakers.

In Aotearoa, the Centre for Social Impact (2018) consulted widely with NFPs in the Nelson Marlborough area to identify capacity building needs for their organisations. Areas of emphasis included increasing diversity on boards and a focus on young people. Recruitment, retention, skills, knowledge, networks, and self-reflection were highlighted as useful areas of focus for capacity building in this area and are likely to be transferable across other Rātā regions.

Cayley (2006, p.2) reviewed 21 Aotearoa and international capacity building papers. He found that capacity building programmes were essential for the NFP sector. They enabled it to continue to adapt and improve within a changing and complex landscape. Cayley (2006) says that NFPs can struggle to cope with a myriad issues including fund raising, governance-management relationships, evaluation and planning. Capacity building needs to be tailored to each organisation and within Aotearoa this includes orienting programmes towards the specific needs, kaupapa and whanau-based structures of Māori and Pacific Island organisations (Ibid, p.3). For NFPs to be effective, they need to have innovative funding strategies, high levels of organisational competence and open evaluation techniques (Ibid, p.5).



Like other authors, Cayley (2006, p.7) stresses the need for an NFP to be ready to accept a capacity building initiative. He says that capacity building programmes need time, effort and money to be effective and should have evaluation criteria associated with them. They are most effective when delivered through face-to-face support, rather than as online resources (Ibid, p.8). Successful capacity building programmes are coordinated and well managed. Capacity building programmes will 'guarantee better use of the funding provided to the sector and more effective outcomes' (Ibid, p.10).

Further afield, a 2015 survey of NFPs found that long-term sustainability (32%), staff retention and pay (25%) and funding that covers the full costs of an NFPs operation (19%) were the key capacity building needs for NFPs (Geo 1, p.4). Another survey, cited in this paper, reinforced these priorities, identifying: fundraising, communications and marketing as the most needed capacities in NFPs (Bridgespan, cited in Geo 1, p.4). Other capacities needed were: volunteer strategy, executive succession planning, technology and human resources (Ibid, p.8). This paper went on to say that highly effective NFPs were strong in five key areas: leadership, decision-making and structure, people, work processes and systems, and culture. Grant maker capacity building programmes most commonly give grants, technical assistance, support for collectives and specialist research and advice (Ibid, p.21). They recommend grantmakers work with other grantmakers and focus on leadership at multiple levels (Ibid, p.32). This paper includes a useful summary of types of capacities (see Appendix).

In a second paper NFP researcher, Geo, discuss the most impactful capacity building programmes offered by grant making organisations, such as Rātā. This paper says that the hallmarks of an impactful capacity building programme includes those that target leadership development, program management and evaluation, fund development, and organisational planning (Geo 2, p.4).

Continuing an emphasis on leadership and governance development, New Zealand NFP specialists Lead (2019), emphasise the importance of peer-to-peer learning to embed new skills and knowledge within NFPs. Lead says that if training is to be embedded in a GO, then it needs to be attached to mentoring and network building. One-off training is often ineffective, in spite of the best intentions of the trainee. Lead (2023, pers. comm.) said that organisational readiness is key to an impactful capacity building programme.



Summary points from the literature on capacity building programmes in grantmaking

In summary, a funding agency has capacity-building programmes because evidence suggests that these programmes enable grantees to get better results. More specifically these results are achieved through a strong capacity building framework and a diverse, flexible and timely approach:

- The Rātā StS capacity building programme is consistent with the best practice described in this literature. The StS Programme is structured around the contextual, capacity and capability framework.
- The types of capacity or capability usually needed in a capacity building programme includes elements of leadership development, fundraising capacity, evaluation capacity, communications and technology support. This is consistent with the Rātā StS capacity building programme.
- However, there is ‘no one right way’ to allocate capacity building grants because the challenges facing NFPs are unique, complex and dynamic. The circumstances that an NFP finds itself in are constantly changing. The literature reinforces Rātā’s StS approach of being flexible and tailoring support to meet NFPs needs. It also reinforces the Rātā’s attention to timeliness of support and working with an NFP when they most need and are most able to take up a new capacity.
- The literature review confirms Rātā’s orientation towards supporting programmes that are focussed on working with those communities of most need.
- The literature recognises the challenges on both sides (grant maker, grantee) to manage the power dynamic in the capacity building relationship. Relationships of trust is one way to addressing this power dynamic. This is consistent with Rātā’s orientation towards engaging collaboratively with and NFP, rather than imposing solutions.

The next section describes the experiences and insights of grantee organisations who have been recipients of the Rātā capacity building fund.



The experiences of grantee organisations

This section is about the reflections of Grantee Organisations about the StS Programme. Their perspectives have been grouped into the three guiding principles of the StS Programme: Context, Capacity and Capability.

The context in which Rātā operates the StS Programme

This section is about the context in which Rātā works and allocates StS grants. This includes the way in which StS grant recipients experience their relationship with Rātā and how they see Rātā contributing to the NFP sector. They have been divided into: Rātā and Kaupapa Māori (KM) organisations; Rātā and non-Kaupapa Māori organisations, and the grant process.

Rātā and Kaupapa Māori organisations

The Kaupapa Māori NFPs interviewed were large organisations, with many government contracts. They shared their experience of their relationship with Rātā; the StS grant they were the beneficiaries of; and the broader context and challenges of their day-to-day work.

Overall, Rātā is highly valued because of how Rātā people work. This relates to, approachability, proactiveness, and timeliness of the grant. These recipients said that the StS funding was tailored to their needs and that the StS grant was unique, enabling them to make an important change.

In addition to the grant, Rātā shared skills and knowledge, wrapping around the grantee. This wraparound has contributed to lasting goodwill for Rātā. Grantees made references to their relationship with Rātā as being 'long-term', 'trusted' and 'aligned'.

Example quotes

- I want to say how incredibly encouraging it was when Rātā approached us directly and said 'have you thought about this'. Aligning our priorities with theirs. We're incredibly busy and can let [our relationship] lapse over time. [A] trusted relationship with Rātā, which is what we've got now. Really to not be the only one [walking] the process with us [is] extraordinary.
- They lean-in on their relationships and their contacts... They say they support us, and they let [others] know that they are working with us... The odd nod in the right direction to say, 'this is a good partner', and vice versa, with us about Rātā.
- Extremely supportive and encouraging of the work we do... Rātā always in forefront of our mind. Build great relationships.
- Rātā is leaning strongly into being a Treaty partner.

Example quotes (continued)

- Easy to say 'Kia Ora' and that they are serious about [impact] and put people under a lot of scrutiny.
- Rātā always believed that capacity-building was important, and thankfully, most funders think that now.
- They're knowledgeable, in the things they know about... If it aligns, they will help to negotiate those spaces.
- Should I ring [a Rātā staff member] up, I know she is always available to tautoko and give advice. Extremely helpful, especially in the beginning [when we needed support].
- We could go to [Rātā] with anything, and they can say 'yes, we can support that' or 'no, we couldn't'. And if they couldn't support us, they would point us in the right direction. We can discuss everything. It's open and transparent.
- They connect us with wider networks to generate opportunities and solve challenges.

Summary and values criteria KM organisations and Rātā engagement

Rātā is highly valued because of how Rātā people work. This relates to approachability, proactiveness and timeliness of the support. The StS grant was unique, enabling the organisation to make a change to an organisational system that was needed and important. Rātā shared skills and knowledge, wrapping around the grantee. This wraparound has contributed to lasting goodwill towards Rātā. Grantees made references to their relationship with Rātā as being long-term and trusted. These interviews suggest that what is valued and important to NFPs includes:

- Rātā being approachable, proactive and timely
- Rātā being supportive and involved, but not imposing
- Rātā being in it for the long-term
- Rātā influencing at the national level.

The remainder of the report includes findings across all interviewees.



The Rātā engagement style

It is clear from the interviews that Rātā has a presence and style that is informed by their values and strategy. Rātā are engaging, value-centred, reflective, responsive, and proactive. They take a stand and are not afraid to lead, influence, and perhaps challenge on behalf of their communities and the NFP sector.

Those interviewed described a Rātā-style of engagement, which has been sustained over time and staff changes. Rātā people are known, encouraging, approachable, involved and proactive. They look for alignment between their strategy and the work of the NFPs. They are realistic about the real-time realities of their work and communicate their values. This has the effect of reducing isolation amongst staff in NFPs and creates a sense of direction, energy and momentum.

Example quotes

- I'd like to convey gratitude to Rātā. The Rātā approach. [It is] very enjoyable [working with Rātā] and [their approach] reduces the paperwork. We really appreciate that.
- Rātā are very relational. They take time to reflect. They are not this beast that we send off funding applications to.
- With Rātā, we value the local connections. We have Trustees that live locally and are always present when there's a function... A lot of respect for the effort they put in there.

Rātā people are collaborative, sharing expertise, networks and creating opportunities.

NFPs use different words to describe the way they see their relationship with Rātā. Some consider it a partnership, where Rātā is closely involved in their mahi, at times co-designing, and at other times initiating a project with the NFP. Rātā is recognised as being involved in solution-finding and opportunity-creating. For example, connecting staff in an NFP with conferences and specialists who can add value in their work. An Opportunities Workshop, and resources on the Rātā website, were mentioned.

Example quotes

- The liberating thing about this funding is that it's partnership-based, collaborative-based, with us feeling that our work is known and understood by Rātā and that we've, together, agreed that this initiative would move us into the future.



Example quotes (continued)

- The relationship? We call it a partnership. It's partnership funding with three funders involved... creating a pool of funding for the long term. To be honest it's about the relationship.
- [The] Opportunities Workshop helped build a picture and open us up to engaging with the likes of the Impact Lab. It transformed the way we look at information and data.

Rātā helps to influence and navigate the funding landscape

Many of those interviewed discussed the challenge of navigating the NFP funding landscape and saw Rātā as an ally in this navigation process. Rātā people share expertise from within their team to enhance the delivery of the StS Programme.

Example quotes

- [I] really appreciate our relationship with Rātā and understand the uniqueness. Bit of journey of figuring [the funding] out. How to fit it all together.
- How best do we gain funding to do umbrella-organisation work? Without continually creating more Trusts. We [don't want to add] more organisations and charities for the sake of funding.
- This work was really initiated by a former Rātā staff member... it took a bit of arm-twisting. As an organisation it made us think about strategic issues, especially how far we want to go in terms of covering other parts of New Zealand. How we can manage growth.
- We really appreciate any funder who can identify Rainbow populations as one of the groups that could potentially benefit from capacity building of our organisations.
- [During our funding] dilemma, we knew that if we were going to get the case allocation through [a government agency], we needed to get our staff trained. [It was a] big piece of work... the training is like an apprenticeship. So, we went to Rātā with a proposal.



Rātā staff share expertise.

Rātā was described as sharing specialist, specific advice. Rātā understand community needs and share information. They add credibility to an NFP in the eyes of other grantmakers.

Example quotes

- I think Rātā have an incredible understanding of community need. I'm constantly looking at all their research and all their papers. Go in and find more. The information... is fantastic.
- The funding... totally did what it was designed for. They fed in expertise and knowledge by putting us onto other people and funders.
- I wouldn't have known there was a capacity-building fund to apply to. That's a good thing. We weren't looking for hand-outs, they said: 'I think we could help you get to that next stage'.
- Rātā don't just resource us with funding but want to support organisation development.
- Rātā gave advice about streamlining the tool... reducing the cost.

Rātā staff have important conversations.

Rātā has cultivated respect and sustained relationships during some hard conversations, for example, about funding policies. Grant recipients were aware of the grant that was contributed and the value the grant added to their work. Some relationships have changed over time as funding policy has adjusted.

Example quotes

- A couple years ago Rātā approached [me and another group in the area] and said: 'You guys are doing similar roles in the environment, had you thought of merging'?
- [Rātā] share the bad with the good... When things not going well, I don't feel anxious about going to them. We looked across the Tasman to see how they were doing it... With the money we made an investment to take our agency on a journey to deliver the programme in NZ. [Our] Team had to undergo rigorous training.
- [The relationship is] a bit shaky. Message received is that [we are] too reliant on their funding. [They] understand the power dynamic of the relationship. They say: 'We don't want to tell you what to do'.

***Rātā helps build confidence and energy.***

Sometimes the contribution the StS Programme to the NFPs is more subtle. For example, building the confidence of the NFP to take action, innovate and improve how they work. One grantee suggested bringing StS recipients together to explore connections and lessons.

Example quotes

- Their support gave me confidence to back myself and be proud.
- Rātā don't just hand out money. They want to go on journey with an organisation and they want the organisation to be the best they can be.
- What [Rātā] have done is a whole lot more innovative. This is... exciting for us.
- Very significant game-changer for us, this will not be kept in the bottom drawer.

Summary and values criteria: collaboration between Rātā and NFP organisations

Rātā people have a presence and style that is informed by their values, strategy and policies. They are seen as engaging, reflective, responsive and proactive. Navigating the NFP funding landscape is a challenge for NFPs and Rātā is considered to be an ally in this navigation process. Rātā as an organisation are not afraid to lead and influence for the benefit of their communities and the NFP sector. These interviews suggest that what is valuable and important to NFPs includes:

- Influencing, coordinating and direction-setting.
- Making a difference at many levels - nationally, regionally and locally
- Transparency, accessibility and reflectiveness
- Being engaging and navigating
- Creating momentum by being proactive and timely.



Reflecting on capacity building and outcomes of the StS Programme

This section focusses on the outcomes of the StS Programme and the value of the capacity building grant for the NFP. Grant recipients described many changes made to the way they work. This included new directions and approaches, and new systems. For example, growing their bicultural practice or digital, communication or evaluation systems.

Often the development of one or more of these systems marked an important change in practice for the NFP. Changes in practice included new ways of reaching more clients, and/or extending their influence in the sector with new strategy or programme. For example, one NFP closed a service and retrained their staff refocusing on their core clients. Another NFP strengthened the social enterprise arm of their organisation, targeting an international revenue stream to order to broaden their funding base.

Implementing new organisational systems lead to many benefits for an NFP. IT was seen as necessary and important, but also challenging to know where to start and stop. For one NFP the implementation of a new digital system was a 'game-changer'. It improved client interaction, increased their profile, and enabled them to launch a crowd-funding initiative. However, their rapid growth meant maintenance and updating of the database became essential and more expensive.

Where an STS grant was for a discrete piece of work, like attending a course, hiring a facilitator, receiving mentoring, or completing an evaluation, the benefits are clear, direct and doable.

Data and information management is considered important for many STS grant recipients. It is also more complex, and perhaps more strategically important. Where an NFP was large and had strong revenue streams, they were more optimistic about funding these improvements. For example, by negotiating for overheads in their service provision contracts.

The next pages in this report expand on these outcomes, using example quotes from the interviews with STS recipients. They have been divided into bicultural practice, communities of need, organisational systems and evaluation.



Improving bicultural practice

Some of the NFPs talked about the growth of their bicultural practice as an organisation. At times the Rātā grant contributed directly to this mahi, for example, supporting the formation of a network of rangatahi workers. At other times the influence of Rātā was less direct, but nonetheless influential, in shaping the confidence of the NFP sector to continue on their bicultural journey.

Example quotes

- We have 120 workers on our contact list - primarily Māori. The [Rātā fund] has enabled us... to be doing what we need to be doing to support Māori and to be upskilling non-Māori [who] work with rangatahi.
- [We are] endeavouring to be a Treaty led organisation. Pou Herenga... a journey of our roles on each side of the relationship.
- We have a Kaumatua. [We have] revised the standards. We always try and have a TW assessor in the team.
- We work with local marae and work alongside iwi... We invited them onto the Board, but it's a capacity issue for them.
- [The independent evaluator] distilled some key impacts. Things we hadn't thought about the way our programme aligns with... Te Tiriti. They came in with more of a helicopter view.

Summary points – bicultural practice and value criteria

- NFPs were often on a journey to increase their bicultural practice and increase the value of their mahi for Māori and Pacifica working in the NFP sector.
- They experienced a sense of pride in their own journey as a Treaty-honouring NFP. They saw this as a learning journey, which sought direction from and followed the guidance of Māori.
- A programme that placed the autonomy of their clients at the centre of their mahi, were uplifted by the new knowledge that this approach was aligned with the Treaty.

These interviews suggest that what is valuable and important to NFPs includes:

- Placing our client's autonomy at the centre of our mahi
- Strengthening of Māori and Pacifica rangatahi networks
- Taking our NFP on a Treaty partnership journey
- Shifting resources within our NFP to support our bicultural journey.

The next section includes findings across all interviewees.



Improving support to communities of need

Many of the StS grant recipients focus on a specific community of need. These communities are diverse. They may include different population groups, such as: children and young people, Māori and Pasifika, Muslim, Rainbow and disabled peoples. Some focus on supporting those facing mental health or family violence challenges. Other NFPs are addressing economic, employment and/or environmental needs. Some of the NFPs have a network or sector focus, for example, working with community leaders, other NFPs or youth workers.

The quotes below describe the different communities of need and demonstrate the range of ways they work to increase capacity. In some cases the Rātā StS grant has contributed directly and specifically to an improvement. In other cases the grant has contributed to an improvement, alongside other funders.

Example quotes

- The sector we work in, the disability sector, doesn't have a high profile. Compared to the physical disability sector... our sector is a lot more invisible. So, more reason to get this work done. To shine a light on the programme. [We have] re-thought our programme. [We are] moving our tutors to be role models and into paid employment. Training dancers to become teachers.
- [The grant] allowed us to go out and review youth organisations...working towards best practice. We were able to build our capability by reviewing and mentoring more youth organisations. One client has made huge changes as result. They had no processes around HR in place. No way of getting reports from Management to the Board.
- We saw a lot of women and migrants displaced from Covid, young people. People from tourism, hospitality and retail. What we do is to talk through people disproportionately disadvantaged by Covid [and economic downturns]. We were able to... leverage that money and help people to understand, if they do go into business, [their] eyes are wide open.
- If you invest in good people, they'll do good things in the long term - an incubator programme. Post-earthquake, it was hard to convince funders to invest in people. [Some of the City leaders] wanted to invest in things they could take photos of, like a community swimming pool... We need to take a longer-term view and grow the people.



Summary points

The StS Programme contributes to improving support to communities of need. NFPs who have been beneficiaries of the StS Programme focus on:

- Specific communities of need (youth, low SES, rainbow, rural)
- Supporting communities at critical times in their lives (e.g., during mental health challenges, youth in transition to work, those facing family crises)
- Supporting communities with unique needs (those with disabilities, those recovering from trauma, grass roots leaders).

These interviews suggest that what is important and valuable to NFPs is to:

- Uplift the voices and visibility of their people.
- Increase the effectiveness and impact of their work.

The next section looks at organisation systems.

Creating new organisational systems and new approaches arising from involvement in the StS

A number of grant recipients talked about the new systems they were putting in place to improve the way they worked with their communities. These systems were generally digital and might include a new customer database, a client-focused website, or a new crowd funding database.

These new systems led to many efficiencies for the NFP. For example, better financial control and speedier induction of clients or volunteers. They also created more subtle benefits for the NFP. For example, one NFP said that a more interactive and integrated website had led to better referrals, with people coming through their doors who were most suited to their kaupapa and services. And, in turn, people accessing their services had more clarity about what to expect from this NFP.

Another NFP said that their new website had increased the accessibility of their mahi to hard-to-reach populations. For another, a greater online presence meant they could communicate their work to a wider pool of funders, launching a crowd funding campaign two days after the website was complete. The digitisation of their organisation also increased the connectivity between staff and volunteers, who were mainly part-time and home-based.

Several NFPs talked about the challenges of bringing new systems into their organisation. A new system needed dedicated time and attention to ensure that it was a good fit for their mahi and community of need. Existing systems needed scrutiny to assess their ability to be integrated into a new system. And NFPs wanted their new systems to also support them to track and report on their effectiveness. Specialists brought in to support this work need to understand the NFP context and be strengths based. For NFPs with government contracts, they wanted the contract reporting to be less rigid and add more value to the outcome-oriented reporting that they prefer. They want to hear back about how their government reports are used and aggregated and then want more flexibility and a stronger client-centred approach to be designed into this reporting. Where all of these parts have come together for a StS grant recipient, the impact has been high.



Example quotes

New digital systems such as websites and customer databases

- [The digitisation of our organisation] would be the single biggest development in our work. [It] had a far-reaching impact and deepened our work... The difference the grant made was [to bring in] specialist digital and project management support. To help make it a priority... A lot of people are working part time and from home. So, we needed a way to stay connected... We are now using administration systems to inform how we tailor our support for each person.
- We found the process was more difficult than we thought because [the researcher] didn't know our business... Pulled us away from our main objective... and didn't fully align with us because it wasn't strength-based. The work won't go to waste.
- The biggest evidence about the outcomes of the Rātā grant is the website. A design-forward site. We wanted our clients to come away feeling held and supported. That illustrates [our values] and cuts across all our communications collateral. The contribution from Rātā is a part of that... [The new website also gives clients] a safe space, with quick access, where they can clear their history.
- In 12-18 months, we will engage another Good Measure Report and shift financial investment... That piece of work will give us more information. We took on board the testing and measuring. What we do is continually changing.

Growing the reach and influence of an NFP

- We've distributed [the evaluation] very widely through our own community as an advocacy tool. Trying to show other organisations [in our sector] what our model for inclusive leadership looks like [We have been] able to connect with other people with disabilities.
- We get a lot of external requests for engagement, particularly from government. We noticed immediately, our collective capacity to respond [has gone up]. That's part of why we formed a collective. To have a more unified response.
- The challenge now is moving into a different price bracket and maintenance of databases once our clients grow past 1000... Keeping data clean. I didn't understand before and now I really do. It can become unworkable, if not kept up to date.



Summary points and value: organisational systems and approaches

The StS Programme contributes to growing the effectiveness and reach of NFPs who have been supported to advance their systems, leading to:

- Better reach into priority communities
- Higher visibility and influence.

These interviews suggest that what is important and of value to NFPs includes systems that work for their people, by:

- Being more efficient
- Connecting their people to each other (clients, staff, volunteers)
- People knowing who they are and what they stand for [our values].
- Being easy to find and support (i.e., visibility with a wider pool of funders)
- Accessing specialists, e.g., digital, marketing, financial
- Getting system improvements that are a good fit for the organisation and able to track and report outcomes
- Clients being in charge of their information
- Clients feeling held and supported by the system design
- Well-matched referrals from referring organisations, like doctors
- Having clients self-refer who are a good fit for their kaupapa
- Having clients who are clear about what to expect when they take up their services (e.g. reporting requirements).

Continuous improvement through evaluation systems and feedback loops

In some cases, Rātā has supported NFPs to put in place information-gathering systems to understand the value of their mahi and identify ways to improve the work they do. For example, an independent study by an evaluation researcher, or SROI analyst.

One NFP has distributed their research report widely and are using the research to increase their profile and change the way they work with clients. Another NFP has committed to quadruple bottom-line reporting and are using the report to access international funding which in turn subsidises their local programmes.

Several NFPs talked about the challenge of designing and implementing information-gathering systems for tracking, and reporting on, their work. There is a need for strength-based and client-centred systems. For example, evaluating their work from a Kaupapa Māori perspective was important for one NFP. For this reason, one-off, project-specific evaluation was easier to complete. More quantitative evaluations, involving internal data and systems, was more difficult to prioritise.



Example quotes

Higher profile and more opportunities

- Our research has been peer reviewed by an international journal. This is the next tier of validation.
It will be another jump for promoting the programme to an international audience. We've got an invitation to go to the Glasgow festival [as a result]. We'd like to take our dancers to more events nationally and internationally.
- Through the media opportunities [generated by the evaluation] we had a TVNZ segment that shines a light on the programme. Especially for us, it's about changing the expectations of our people... Moving our people into leadership positions changes that power dynamic, changing mainstream views that are quite narrow.

Sourcing data and integrating information systems can be a challenge for an NFP

- Well, we have to rejig this stuff so that it's applicable and easy and then look at it from a systems approach and make choices [about whether] to integrate it with our client management system... But that in itself comes at a huge cost and we need to look to see where the benefits will lie.
- We have been talking about a capacity building grant for our computer systems to get more useful information about [and for] our clients... Currently, we have to go to different reports and extract information we need and put it in another report to analyse it.
- We are always very conscious of creating more [work] for Kaimahi by collecting this information and very conscious of taking more information from whai ora who are already giving a whole heap. ... But the government has gotta take some responsibility for that. Ultimately, you have to conform to the way they work. Systems are so structured, and they won't move. It makes it harder for you to deliver what you want to deliver. Rigid.
- We took a developmental evaluation approach, collecting data all along. Mainly qualitative tools and reporting every quarter. [We found a] trend of good impact on everyone and outstanding impact on some people.
- [The] new business relationship was beneficial and enjoyable for us both. It led to more focus on our information needs and integrating our systems. The adapting and customising of the database also forced us to look at our work with fresh eyes... you have to have a clear idea of what information you want to collect and how to use it.



Summary points and value criteria

All grant recipients were using the StS grant to improve the way they deliver their service to a community of need. The communities of need were wide-ranging. Tailoring the StS grant to their needs has resulted in a diverse range of capacities being supported. Some are growing a network of leaders. Others deliver services direct to whai ora. The scale at which they work is diverse – from local and regional to national. At times the reach of an NFP extends internationally.

In terms of size, some NFPs have a few employees and a volunteer team. Some are informal and collective, while others have a Board structure. A few have grown to be large employers with multiple income streams. The StS Programme contributes to growing the effectiveness of these NFPs by:

- Improving the autonomy of clients and putting them at the centre
- Improving the way they deliver their service to their people/community of need
- Continuous improvement through feedback loops, reflection and evaluation
- Tailoring the service to a community of need
- Integrating and digitising systems such as websites and customer databases.

These interviews suggest that what is important to NFPs includes:

- Tailoring their programme for their clients/people
- Putting their clients in the centre
- Increasing the autonomy of clients/their people
- Increasing the efficiency of their organisation
- Validating the quality of the work they do
- Increasing the profile of their NFP
- Creating more opportunities
- Bringing fresh eyes to their mahi
- Managing their information better
- Challenging mainstream views.



Capability Building - improving the governance and professionalism of NFPs

This section focusses on the outcomes of the StS Programme relating to capability building.

NFPs use the StS grant to support strategic planning, contributing to restructurings, mergers, new forms of reporting and new collectives. The NFPs talked about the benefit of having the 'head space' that the grant provided to reconsider, clarify and regroup.

Some NFPs have been able to connect into wider networks, through hui, training and mentoring. Those with Board structures described the value of tapping into the expertise on their Boards to improve the efficiency and effectiveness of their work.

Some grant recipients mentioned the challenge of high turnover in the NFPs they worked with. Staff and volunteers leaving meant that resources, such as manuals and ongoing training or mentoring was important. Two NFPs expressed concern over the need to support grass roots youth workers. They specifically mentioned supporting Māori workers in non-Māori work places and Rainbow youth.

The challenges of securing funding were mentioned, as was the need to comply with the legal and financial requirements of the sector. Grant recipients often said they were exploring strategies to diversify their funding sources. Strategies used by NFPs included scaling up in some way, e.g., joining umbrella organisations, merging, or growing. The central role of Rātā in funding these NFPs is clear.

One NFP used the Rātā grant to revisit their purpose and services, during a major funding challenge. Some NFPs mentioned the complexity of reporting in many different formats to different funders, especially if they also worked nationally, or across different funding regions.

The following pages expand on these outcomes, using example quotes from interviews with STS people. They have been divided into strategic planning, leadership and community networks, Boards, and specialist advice.



Strategic Planning

Example quotes

Having time and space to reflect and engage

- It's very, very, rare to have a grant without an output or a deliverable. It is hugely valuable in accessing funding that allows us to get together to challenge our current thinking and allows us to work with people we would never be able to afford to work with.
- Rātā funded us to provide mentoring to NFPs and get them to meet regularly to share challenges and opportunities. What the group found was that it doesn't matter whether they were working for the benefit of people or the environment, the challenges were all the same.

Restructuring, collectivising, or merging to generate new opportunities and revenue streams

- To be able to work with people who understand social enterprises was refreshing. It was inspirational and affirming. At that time, we were at the start of trying to create a new wing of our organisation. To set up as a social enterprise and scale significantly and across a complex enterprise.
- [The grant meant] we could hire an outside person to get that initial process underway. I don't think we would be the organisation we are today had we not [moved to be a Board]. An independent person... to bring clarity and fairness to both organisations. We were poles apart in our thinking. We have grown and developed.



Leadership and community networks

Example quotes

Bringing the volunteers on the journey

- When you rely on volunteers, they are the backbone of our organisation. So, it was a good, exercise to understand the importance of bringing along people on the journey... I quite like to get things done, now. When I reflect back, I think 'oh that took a long time, but it was important, we needed to do that'.

Becoming an umbrella organisation for others, and part of a national approach.

- We saw immediate impact. As soon as we went through the recruitment process [for our new collective] and found our two Coordinators. It's so, so, helpful [having paid staff].
- [We are] an umbrella organisation for rangatahi youth workers, rainbow youth, a Canterbury youth voice.
- It's a challenge for NFPs to have a formal structure.... We end up being an umbrella organisation for others, so they don't have to form a Trust to get funding.
- We aim to lift-up the members in our smaller organisations within our collective. Those who often don't have paid staff.

Developing informal leadership capability and growing community networks.

- We take people on a personal leadership journey. Including 40 each year. The Alumni from [one group] ended up supporting the Recovery Centre in Hagley Park. We were there two days later... We were able to put three people onto the three shifts a day.
- I saw nice relationships form. I saw people in [one small community], that maybe didn't [know each other] come closer together and enjoy each other's company. They get on and... there was enough familiarity and commonality that they would be able to run a meeting themselves.
- Some members of the Rainbow community are joining Boards because they want to feel a part of their community. A community service feeling. What they are looking for is a group of people to talk with and connect to, not all the legal and financial responsibilities.



Access to specialist advice gives direction and builds confidence

Example quotes

- [Our new direction] was around a project we worked on with the Impact Lab. A big reset... Rātā funded us [through a critical time, allowing us to] delve deeper into what we were providing and we took the recommendations really seriously. We are child-centred and everything we do is around keeping children safe. We looked abroad to see better programmes... Rātā gave us breathing space.
- Look with any of these organisational systems, it's where you start and stop [that is the challenge].
- When we got in a marketing specialist. That was very useful. Good organisations doing good work, but fundamentally you've got to be able to communicate to your volunteers. Because a lot of them were running a social enterprise type activity.
- We went to [a meeting] in Wellington and were able to meet people and listen to speakers in totally different industries. It opened my eyes to the power and need for more social enterprise... and accelerated our thinking around that. So, we've positioned our organisation to stay ahead with quadruple bottom line reporting. We are looking at our environmental, cultural, social and financial impact.
- One of the fund managers said to us: 'You're not meeting the mark, you are leading the way. Wow, that's pretty cool to hear'.
- Rātā have helped us to strengthen our organisation in multiple areas.
- Now we're up and running and going really well, how we can boost-up funding has been [a focus]. How do we grow?
- Once we've completed our operational plan. Then, we're looking to get more sponsorship...The bigger we get, the more we can streamline resources.



Summary points and value: governance and professionalism

The StS Programme contributes to improved strategic planning of NFPs by enabling NFPs to:

- Have time and space to reflect, consult, reconsider, clarify and regroup
- Reform, merge, restructure and collectivise
- To better position their NFPS, identify new opportunities and search out new revenue streams
- To grow
- To influence policy making at the national level.

These interviews suggest that what is important and valuable to NFPs includes to:

- Be refreshed, inspired and affirmed
- Be better able to navigate their path and influence others
- Tap into wider networks and access specialist advice
- Have paid staff
- Lift-up their members and communities and be a voice of influence
- Delve deeper and to look abroad, as well as look to the grass roots.

Conclusions and Recommendations

It is clear this successful capacity building programme has led to more effective outcomes for the communities of need in Rātā Foundation region.

This section contains the key conclusions of this research and recommendations to address the research questions outlined in the first part of this report.

The value or added benefit of the programme to the grantee

The StS Programme makes an important contribution to the NFPs who have received grants and / or advice through this programme. Particularly where the engagement occurs at an important time in the NFPs development and when they are ready. For example, prior to restructuring, during a funding challenge, or during rapid growth.

Sometimes the grant covered all of the costs of a capacity building initiative within the NFP. For example, hiring a facilitator to run the consultation process for two organisations prior to a merger; or paying for a staff member to explore social enterprises. Occasionally the grant allowed subsidised services to NFPs, such as accounting advice or governance mentoring.

For NFPs that were a significant size, with paid staff, their attention was mostly on service delivery and contract management. They appreciated the StS grant and Rātā's support in their formative stages of their mahi. This goodwill remains several years after they had received the support.

Where Rātā had supported less visible communities of need, these communities felt supported and heard. Even though some of these innovations had presented new challenges for the NFP, such as 'more reporting'.

The outcomes of the STS (positive and negative)

In summary, the StS Programme contributes towards these broad outcomes by strengthening the grantee organisations:

- Bicultural practice
- Supporting communities of need
- Improving organisational systems
- Continuous improvement
- Better governance and leadership
- Greater professionalism.



And within these broad outcomes are many subtle and specific ripple effects for recipients. These include visibility, confidence, courage, networks, new skills and, importantly, more effective programmes.

Rātā is seen by NFPs as known, trustworthy, relevant, clear and Treaty-aware. Rātā people are responsive, communicative and in touch with the realities of the sector. They are aware of and sensitive to their role as grantmakers. They are prepared to use this influential role to lead and influence on issues that make the most important differences in their communities.

Rātā people are sensitive to the timing of their support, being sure to check that an organisation is ready to engage, and that they are following the lead of the NFP, rather than imposing solutions. Consequently, the types of organisations that the StS Programme has supported are diverse and the type of support offered is wide-ranging and flexible. Rātā should sustain and amplify this approach.

The quality of the programme

The quality of StS programme is borne out by themes in international and local capacity building literature. It uses a framework that is based on best practice in international grantmaking and surrounded by the korowai of the Treaty of Waitangi. These two strategies ensure that the programme is built on solid foundations. Wherever possible Rātā has promoted reflective practices through impact studies, feedback loops, consultation and evaluation. These practices enable continuous improvement and build confidence.

Challenges for Rātā and StS grantees

In some cases a NFP has not been able to fully embed a new initiative, like evaluation reporting, into their system. This relates to disruptions such as the pandemic, poor contractor fit and workloads.

The need for digital information systems to integrate and interface makes for challenging, resource hungry work. The larger an NFP grows, the more locked in they can be to reporting formats of their funders, such as central government. Reporting flexibility and an evaluative culture are valued by StS grant recipients, even those working in a contracting context.

For all NFPs, funding for the long term remains one of the biggest challenges being faced. Some NFPs are well-advanced in their search for new revenue streams. While some types of NFPs are well-suited to wider funding pools. Others may have fewer options. For others, e.g., those who have recently recruited paid staff, the journey towards financial sustainability is just beginning, and they are making the most of the opportunity an StS grant offers to take action.



Learnings and recommendations

Learnings

Overall, the StS Programme is wide-ranging and impactful. As stated above the quality of the StS Programme is high and aligned with capacity building literature.

The Rātā engagement style, together with the StS Programme, have established a firm foundation and mandate for Rātā to lead, navigate and extend their influence in the NFP sector.

At the capacity and capability levels, the readiness of an organisation to take-up a StS grant will be a key to their success.

Supporting NFPs to identify specialists that are a good fit for their organisation will continue to be important as is supporting the scoping and assessing the needs for information systems (IT) and supporting implementation.

Recommendations

Rātā continues to use the Context, Capacity and Capability framework to deliver the programme in line with best practice.

Rātā may wish to amplify their approach to capacity building, particularly at the contextual level. For example, by collaborating with other funders and activating their networks and influence with and on behalf of communities of need.

Diagnostic tools to may be helpful to compliment the face-to-face engagement mahi of Rātā people to better understand the readiness of an organisation to take-up a StS grant.

For those NFPs needing to upgrade and integrate their information systems, support with scoping and assessing the needs and supporting implementation could be helpful. Keeping a focus on systems that support the tracking of outcomes will be necessary.



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Appendix: What is a capacity?

This list of capacities comes from Geo 1, p.7Bartczak (December, 2013) Supporting Nonprofit Capacity: Three Principles for Grantmakers – Nonprofit News.

- **Leadership** – staff and board leadership skills, capacity to support talent development for all staff, executive transition planning, ability to steward effective organizational culture
- **Mission, Vision and Strategy** – organisational planning, assessment and strategy development
- **Diversity, Equity and Inclusion** – attention to equity throughout the organization's practices and work
- **Program Delivery** – capacity to design and deliver effective programs
- **Fund Development** – fundraising strategy and planning, plus skills and internal systems for fundraising and other revenue-generating activities
- **Financial Management** – skills and systems for accounting, budgeting, financial planning and other activities to ensure financial health
- **Communications** – skills and capacities in marketing, online presence, media relations and social media to raise awareness and attract attention and resources to the organization or issue
- **Technology** – information technology systems, digital data and infrastructure, and staff skills to use technology to facilitate the work
- **Collaboration** – skills and mindset to create and sustain strategic relationships with colleague organizations, stakeholders and decision-makers that can help advance the mission and possibly spark collaboration
- **Evaluation and Learning** – capacity to gather data, measure impact, close feedback loops and assess lessons learned in order to strengthen the organization's work over time



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