**PMP & Participatory Philanthropy**

Hi all.

A few weeks ago, those of you who were here may have remembered me doing a presentation about the J R McKenzie Trust. During my presentation, I spoke about the work of the Peter McKenzie project and in particular, what we are doing in regards to Participatory Philanthropy.

So that’s why I’m here again. To talk about the Peter McKenzie Project (PMP) and Participatory Philanthropy, too hard to say so let’s use the abbreviation PP.

But first let’s do a quick recap. **SLIDE**

Sir J R McKenzie set up a chain of department stores in NZ, the first store opening here in Dunedin in 1910.

Established the JR McKenzie Trust at the Conference of Rotary Clubs in Palmerston North in 1940, Sir John Robert McKenzie made a ‘munificent gift’ to the people of Aotearoa New Zealand.

Through a donation of £100,000 plus one-third of the McKenzie’s Stores’ annual profits, the J R McKenzie Trust was born. **SLIDE**

JR’s legacy was inherited by his son Roy and he sat on the J R McKenzie Trust Board from 1947 – 1993, Chairing it for 17 years. **SLIDE**

A significant connection with Rotary remains.

Back to Sir Roy McKenzie, Roy had 3 children, Peter (born in 1952), John (1954) and Robyn (1955).

That’s a brief summation of the family history and today, I’m going to focus on the 3rd generation of the McKenzie family, in particular Peter. **SLIDE**

Peter grew up with his family in Wellington. As a youngster, he explored the bush clad hills and holidayed in the Marlborough Sounds, and it was these experiences that inspired Peter in the area of Conservation.

For his 21st birthday in 1973 Peter received a significant parcel of Rangatira Ltd shares and the decision was made to gift one-third of them to form a nature reserve trust. **SLIDE**

He purchased a parcel of land near Waikanae and developed the land into what is now the Nga Manu Nature Reserve.

Grant Chirnside and I had the privilege of going there last Friday for the JR McKenzie Board Meeting. A beautiful place and well worth a visit. Here is Grant feeding the eels – do we say what we fed them with? **SLIDE**

In addition to establishing Nga Manu (the birds), Peter also established a trust – the Jayar Charitable Trust, a trust he wanted to make a substantial difference to New Zealanders’ lives.

The Jayar Charitable Trust arose from the sale of the investment company Perpetual Trustees Estate and Agency Company of New Zealand.

The remaining assets from the sale, $7 million, were invested in the Jayar Trust, which was also able to accept further bequests and donations.

The name ‘Jayar’ is after a favourite horse from the Roydon Lodge Stud (McKenzie Family).

The Jayar Trust had originally been an investment arm for the J R McKenzie Trust, but in 2011, Peter McKenzie seeded the idea of spending all of its funds on one focus over a period of up to 20 years.

In his words, ‘This scale of investment in a single project or area could have a really significant impact, generating a much greater “social return on investment” than could be achieved by continuing the present strategy.’

Sadly just one year after seeding this vision in 2012, Peter passed away from Cancer.

Following his death, a committee was established and led by our own Neville Caird to identify possible focus areas.

Initially the project was called Toby (after Peters dog) but once the Kaupapa was identified and agreed upon, the Toby Project was renamed the Peter McKenzie Project in his honour in 2017.

The vision of PMP is

**Imagine an Aotearoa New Zealand where all our children, young people and mokopuna flourish**

PMP has a focused approach towards system change. **SLIDE**

In 2017 when PMP launched, 28 per cent of Kiwi kids were living in a low-income household where their caregivers were struggling to provide them with the basics needed for them to flourish, for example, food, shoes and a warm house.

An horrendous statistic and even today, NZ has one of the worst rates of child poverty in the western world.

PMP wants to ensure that tomorrow’s children do not suffer the sometimes lifelong effects of living in poverty.

PMP seeks ideas to change the root causes of social problems to reduce child and family poverty. We have a much more ‘experimental approach’ and a higher propensity for risk in return for reward when compared to the main J R McKenzie Trust.

When PMP called for ideas to support its vision, it received 259 ideas that were reviewed and assessed; currently nine projects, initiatives seeking to understand the structures and systems that lock families into poverty and how to unlock these constraints, were developed in partnership and funded.

The funding arrangements are long term, not just 1, 2 or 3 years like most funders.

Tokona te Raki, for example, is a Ngāi Tahu-led collaboration that aims to increase Māori participation, success and progress in education, employment and income.

The Peter McKenzie Project approach is encapsulated in the metaphor of a flotilla of waka (the whole more than the sum of the parts) **SLIDE** traversing the ocean to an Aotearoa where all tamariki have the chance to live a life filled with opportunities to thrive.

In our view, there could be no better result to honour the memory and legacy of Peter McKenzie.

So lets talk PP.

In 2021, ngā Kaikōkiri and the PMP Committee gathered to discuss whether there was interest in moving towards a participatory model of philanthropy, and if so, what a model might look like.

Former Dunedinite Lani Evans, a PMP Committee member, had undertaken a Winston Fellowship enabling her to meet with radical philanthropists in the United Kingdom and North America.

Her report, Participatory philanthropy, an overview (Evans, 2016), provided to Mahi Tahi (gathering) challenged funders to move towards a participatory practice model. As she pointed out, “philanthropy was always supposed to be the radical disruptor, able to take risks to innovate solutions. What are we waiting for?”

There was strong interest in ngā Kaikōkiri joining with the Committee to decide on the areas and aspects of upstream work to focus on, the selection and implementation of proactive and joint projects, and ways of building capacity and bringing other voices on board. They were interested, too, in deciding how to leverage more resources for this work.

While it was acknowledged the outcomes of moving to a participatory approach would be affected by how it is structured and “how it ends up looking” several benefits were identified **SLIDE**

Sharing power: Money is power. Sharing power is a further step in PMP’s journey towards trying to build a healthier, more equitable and effective ecosystem.

Te Tiriti o Waitangi based philanthropy: A participatory approach aligns with Te Tiriti o Waitangi principles and partnership obligations.

Enhanced decision-making and a better use of resources: While the Committee has considerable expertise and experience, ngā Kaikōkiri have the most proximate knowledge and experience of the systems they are trying to change and the communities they are working with. They are well placed to identify gaps, emerging issues, creative and innovative courses of action, and adaptations required in a changing environment.

Also greatly encourages collaboration between ngā Kaikōkiri

Improving the funding process: ngā Kaikōkiri can bring their funding experiences to the table potentially enhancing the experiences of applicants and those funded and ensuring resources are provided at the right time and in the right way.

It increases ownership and accountability: while ngā Kaikōkiri contribute to the PMP vision, they felt making strategic decisions would further strengthen their sense of ownership of the project.

It is the right thing to do: It promotes diversity, equity, and inclusion in the process as well as the outcomes being sought. The move is evidence of PMP authentically shifting power by “walking the talk.”

It broadens knowledge and connections: Ngā Kaikōkiri have different networks and connections, which would allow PMP to identify new initiatives.

Overall, the move towards a more participatory philanthropic model was seen by Mahi Tahi participants as building a stronger, and more resilient funding and decision-making system, which would better support ngā Kaikōkiri both individually and collectively.

So how will this impact the impact of PMP? We are early on our learning journey. It is acknowledged that the work towards a more participatory model is a “welcome starting point.” We are unsure how it might unfold. There are still questions which will need to be considered in progressing this work. A sub group has been appointed to move this work forward.

I mentioned when I was here a few weeks ago that this is pretty unique, especially in the NZ philanthropic landscape.

We’re very much creating our own path which is pretty cool. **SLIDE**

I’ll finish with a quote that Peter McKenzie liked ‘If everything you back succeeds you haven’t taken enough risks’.