

How Charities are Shaping Education Policy in New Zealand

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He Kura Tāngata, He Tāngata Kura

‘Charitable Purposes’

- the relief of poverty,
- the advancement of education or religion,
- or any other matter beneficial to the community.

(Charities Act 2005)

Figure I shows the relative shares of total giving by source.

FIGURE I - TOTAL GIVING BY SOURCE (\$m, %)

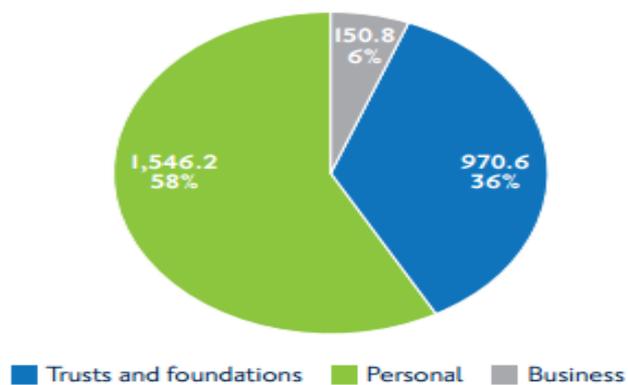


Table 3 shows the corresponding estimates as a percent of total estimated giving and of GDP, as presented in Figure I.²⁹

TABLE 3 - TOTAL GIVING BY SOURCE, 2011

Source of Giving	Estimated Giving		
	\$millions	%	%GDP
Trusts and foundations - voluntary	282.7	10.6%	0.14%
- statutory	687.9	25.8%	0.35%
Personal giving	1,546.2	58.0%	0.78%
Business and corporate giving	150.8	5.7%	0.08%
Total	2,667.6	100.0%	1.35%

source: BERL

*Inspiring generosity &
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Social Impact Investing: An Expert's View

9 October 2015

10am to 12om, Friday 9 October

University of Otago House, 385 Queen St, Auckland



The number of trusts and foundations getting involved in social impact investing is on the rise. Leaders in the field include the Heron Foundation in the US which is the process of moving all of its \$300 million assets into social impact investing. However, many trusts and foundations are still unsure about how best to go about this new kind of investing, which aims to deliver tangible outcomes that directly contribute to their mission while also achieving a financial return.

We're delighted to offer you the unique opportunity to get insights from British social impact investing expert David Carrington into how your organisation can leverage its assets for greater impact. David will talk about the social impact investing scene in the UK –





<http://www.core-ed.org/> <http://www.kidscan.org.nz/>
<http://www.cognitioneducationtrust.org/>
<http://www.nextfoundation.org.nz/>
<http://www.foundationnorth.org.nz/>



‘Public Benefit’

There are two aspects to the “public benefit test”, that is:

- ✓ There must be an identifiable benefit, assessed in the light of modern conditions and
- ✓ The benefit must be to the general public or to a sufficient section of the public.

(Charities Commission 2009)

Public-Private Benefit 'Ratio'

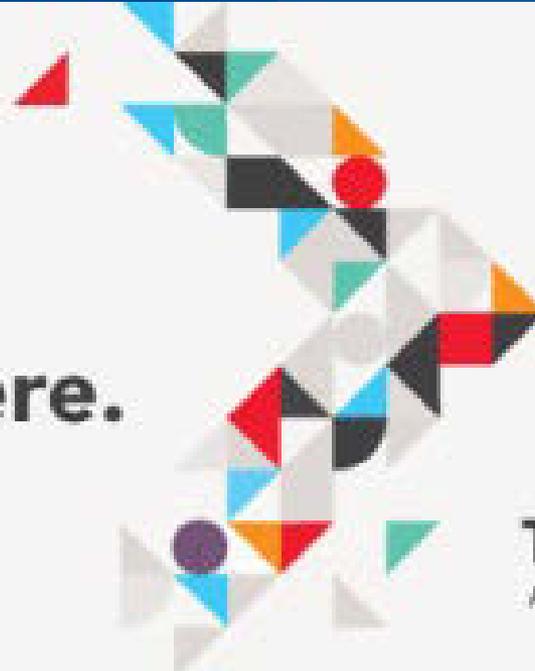
	Note	Consolidated		Parent	
		2015	2014	2015	2014
Rendering of services - domestic		17,064,199	14,034,562	-	-
Rendering of services - international		10,706,865	11,324,611	-	-
Donations received	15	-	-	500,000	2,850,000
Revenue		27,771,064	25,359,173	500,000	2,850,000
Other income	8	916,969	2,285,525	595,748	169,020
Other expenses		(749,196)	-	-	-
Distributions to beneficiaries		(251,826)	(115,063)	(251,826)	(115,063)
Rental and operating lease expenses		(1,809,506)	(1,809,883)	-	-
Travel expenses		(1,146,164)	(953,335)	(4,445)	(5,745)
Finance expenses	9	(39,567)	(41,747)	-	-
Depreciation and amortisation of fixed assets	9	(383,109)	(367,099)	(2,391)	(2,906)
Net loss/ on disposal of fixed assets	9	(5,033)	-	-	-
Directors' fees		(307,596)	(327,533)	(70,795)	(74,605)
Employee expenses	9	(16,310,244)	(14,708,614)	(60,000)	(60,000)
Direct project costs		(4,690,347)	(4,249,714)	-	-
Other operating expenses		(3,347,586)	(3,416,769)	(52,180)	(47,518)
Foreign currency translation gain/(loss)		110,420	(36,833)	-	-
(Loss)/profit before income tax		(241,721)	1,618,108	654,111	2,713,183
Income tax expense	19	(131,201)	(123,184)	-	-
(Loss)/profit and total comprehensive income for the year, attributable to owners of the parent		(372,922)	1,494,924	654,111	2,713,183

In 2015, the Cognition Education Trust is providing funds to support: **Fulbright New Zealand, Stewart Germann Grant, Whakatupuhia te reo, Whakatupuhia te tamaiti** (Enhancing Student Voice to influence school-wide decision-making and accelerate student progress), **Technology's role in Facilitating Student Voice in NZ classrooms, Manaialalani Education Trust, Storytime Foundation, and New Zealand Geographic.**



TFNZ

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TeachFirst 
Ako Mātāhupu **NZ**

Local Policy Networks



Global Policy Networks

SUPPORTERS

Teach For All is grateful to all of our supporters.

GLOBAL CHAMPIONS

Our Global Champions have committed at least \$1 million in annual funding to Teach For All.

Deutsche Post DHL Group | ExxonMobil |
The George Lucas Family Foundation | Laura and John Arnold |
Lawrence Ellison Foundation | Robertson Foundation |
Sue and Steve Mandel | The World Bank

PARTNERS

Our Partners have committed at least \$500,000 in annual funding to Teach For All.

**Acacia Conservation Fund | Credit Suisse | Finnegan Family Foundation |
Oak Foundation | Omidyar Network | Seedlings Foundation |
Susan and Thomas Dunn**



SUPPORTERS

Our Supporters have committed at least \$250,000 in annual funding to Teach For All.

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Government of Puebla | John & Amy Griffin Foundation, Inc. |
Kenneth C. Griffin | Qatar Petroleum International |
Schusterman Family Foundation | Western Union |
Zell Family Foundation



STRATEGIC PARTNERS

Our strategic partners provide significant in-kind support across key areas.

**Boston Consulting Group | Cisco Systems, Inc. |
Deloitte Touche Tohmatsu**

Boston Consulting Group | Cisco Systems, Inc. | Science Techno Formosa

FRIENDS OF TEACH FOR ALL

Our Friends of Teach For All have committed at least \$5,000 in annual funding to Teach For All.

Abby Falik and Joel Serge | Alexander Foundation | Angela and David Kenny |
Ann and Andrew Tisch | Antonella Mei-Pochtler | Apax Foundation | Applied Materials |
Arthur O. Sulzberger, Jr. | Bank of America Charitable Foundation |
The Capital Group Companies Charitable Foundation | Cisco Systems, Inc. |
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Government of Malaysia | Gregory Wendt |
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The Prudential Foundation | The Samberg Family Foundation |
The Saunders Family Charitable Foundation | The Scully Peretsman Foundation |
Sheryl Sandberg | Sir Peter Lampl | Sue Lehmann and Ted Dreyfus | Sujay Jaswa |
Tandon Family Foundation | U.S.-Mexico Foundation | Volkswagen Bank Mexico |
W.K. Kellogg Foundation | W.L.S. Spencer Foundation

GET INVOLVED



Public Private Benefit 'Ratio'

KIDSCAN CHARITABLE TRUST GROUP

Statement of Financial Performance
For the Year Ended 31 December 2014

	Notes	Group		Parent	
		2014 \$	2014 \$	2013 \$	2013 \$
Campaign Income		2,213,608	2,213,608	1,837,153	1,837,153
Government Income		759,972	759,972	168,810	168,810
Philanthropic Trusts and Gaming		1,130,819	1,130,819	1,148,207	1,148,207
Sponsorship Income		894,132	894,132	503,340	503,340
In Kind Gifts and Donated Goods received for Programmes & Admin.	1(c)	4,174,440	4,174,440	2,762,332	2,762,332
Interest and Dividends		96,006	96,006	45,260	45,260
Donations		470,673	470,673	535,453	535,453
Total Operating Revenue		9,739,650	9,739,650	7,000,555	7,000,555
Campaign Costs		248,441	248,441	230,061	230,061
In Kind Gifts and Donated Goods used in Admin.		147,664	147,664	-	-
Administration Costs		1,204,458	1,204,458	891,271	891,271
Operating Costs		1,600,563	1,600,563	1,121,332	1,121,332
Programme Costs		3,570,363	3,570,363	2,097,073	2,097,073
In Kind Gifts and Donated Goods used in Programmes	1(c)	4,026,776	4,026,776	2,762,332	2,762,332
Investment in Children's Programmes		7,597,139	7,597,139	4,859,405	4,859,405
Total Operating Expenditure	2	9,197,702	9,197,702	5,980,737	5,980,737
Net Surplus for the year		541,948	541,948	1,019,818	1,019,818



Takeaway: The public-private swamp

1. Government only 'subsidises' the true cost of public education.
2. Families are expected to invest in the cost of acquiring human capital.
3. Four incentives to private sector participation in public education are (i) corporate welfare; (ii) knowledge transfer; (iii) networks/alliances; (iv) financial profit.
4. Philanthropy can be either (i) altruistic charity or (ii) social investment/venture philanthropy.
5. The acid test of private and philanthropic sector participation in public education is the aggregate increase/decrease in social democracy