

JBWere Philanthropic Services

For-Purpose Covid-19 Technical Bulletin

By John Morrow

18 May 2020

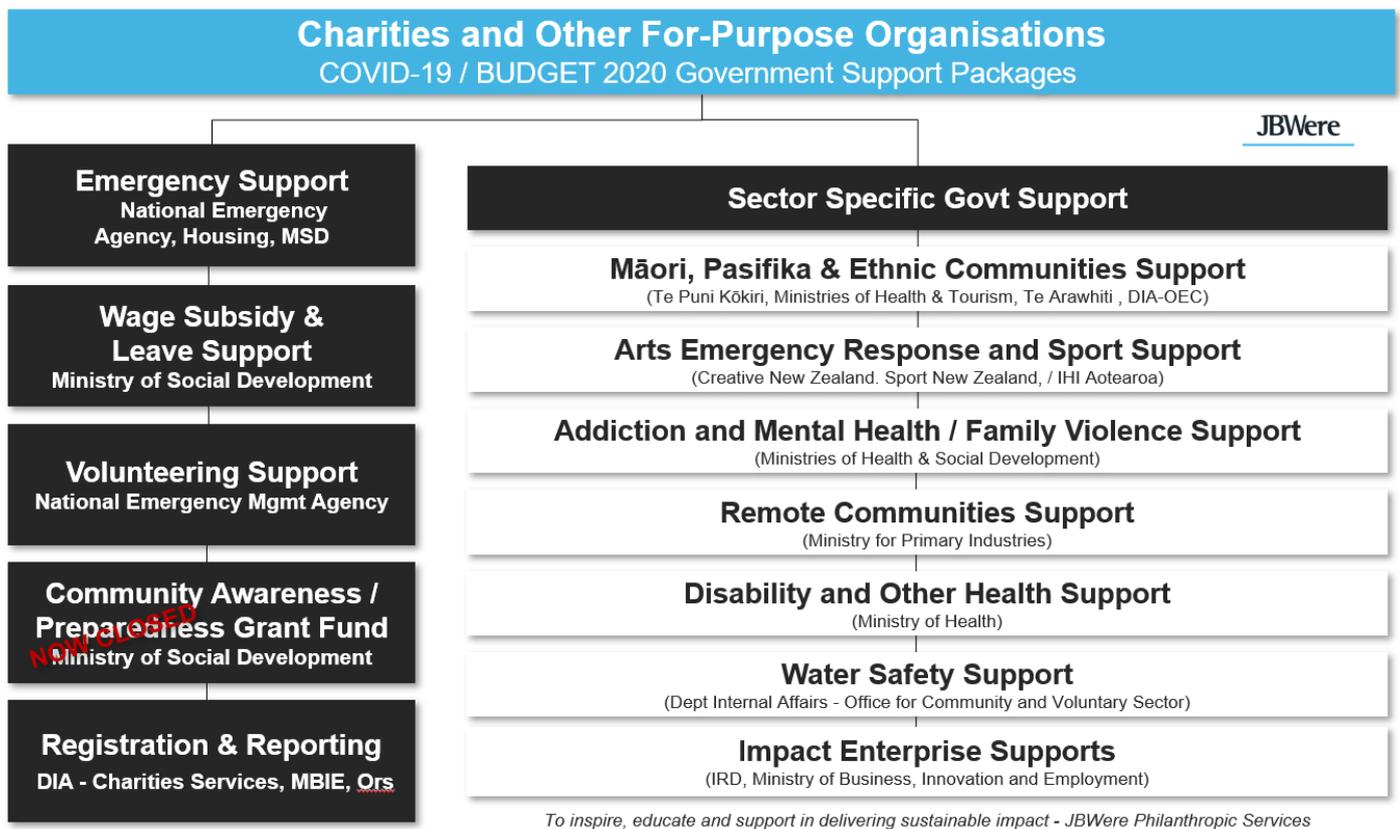
JBWere proudly provides investment management and philanthropic services to over 130 for-purpose clients in Aotearoa New Zealand. The Coronavirus (COVID-19) poses a unique and unpredictable risk for the New Zealand economy and society as a whole, with the New Zealand for-purpose sector at one of the fault lines in navigating this challenge.

As the JBWere Cause Report articulated, the sector is diverse with 18 different sub-sectors, all with varying revenue sources across government, philanthropy and self-generated. The asset base of the sector may well be strong overall, but fundraising is dominated by the largest organisations with the largest 9% of charities receiving 91% of all donations. Different organisations will face different challenges during these testing times, be it their own financial sustainability, sources of revenue and volunteers, and/or their ability to deliver services to a society in need.

The For-Purpose COVID-19 Bulletin summarises the current central government packages available to the sector and its employees, including those announced by the Government in its 2020 Budget. It also highlights the additional government funding available to certain sub-sectors.

The Philanthropic Services team will shortly be releasing a COVID-19 update that attempts to estimate the outlook for philanthropy, public giving and volunteering in Aotearoa New Zealand over the next two years, during this unprecedented combination of a significant global health crisis and a major economic downturn.

This article is based on the publicly available information as at 18 May 2020, the time of issue. The information herein may be condensed or incomplete.[Updated 19 May]



Summary

1. Government COVID-19 Support Measures
2. Emergency Support (National Emergency Management Agency, Housing, MSD)
3. Wage Subsidy (Ministry of Social Development)
4. Leave Support Scheme (Ministry of Social Development)
5. Volunteering Support (National Emergency Management Agency)
6. Community Awareness and Preparedness Grant Fund (Ministry of Social Development) (*Update: fund now closed*)
7. Other Government Administered Funds (Dept Internal Affairs)
8. Registration and Reporting Compliance (Dept Internal Affairs – Charities Services, MBIE, Others)
9. Sector Specific
 - Māori Communities Support (Te Puni Kōkiri, Ministries of Health & Tourism, Te Arawhiti)
 - Pasifika Communities Support (Ministry of Health)
 - Ethnic Communities Support (Dept Internal Affairs – OEC)
 - Arts Emergency Response (Creative New Zealand)
 - Sport Support (Sport New Zealand / IHI Aotearoa)
 - School Lunch Support (Ministry of Education)
 - Addiction and Mental Health Support (Ministry of Health)
 - Family Violence Support (Ministry of Social Development)
 - Remote Communities Support (Ministry for Primary Industries)
 - Disability and Other Health Support (Ministry of Health)
 - Water Safety Support (Dept Internal Affairs - Office for Community and Voluntary Sector)
 - Impact Enterprise Support (IRD, Ministry of Business, Innovation and Employment)
10. Special Mentions
11. Keeping Informed

1. Government COVID-19 Support Measures

This is a summary of the central government support measures that impact the charities and other for-purpose organisations (non-government organisations).

Government contracts - No clawback on Government funding of social services by NGOs

The Ministry of Social Development, Oranga Tamariki (Ministry for Children) and other major Government funders of social services have developed a shared set of commitments to NGOs that they contract with as provided [here](#). These include a commitment to no 'clawbacks' on funding provided this financial year, to 30 June 2020 – as well as commitments to give as much certainty as possible on future funding.

2. Emergency Support (National Emergency Management Agency, Housing, MSD)

Following on from the initial \$27m government package to assist NGOs and community groups to deliver services during the Alert Level 4 lockdown the government has announced another emergency support package.

The government has [committed](#) an additional \$30m to support the delivery of food and welfare assistance to those who need it the most. Unlike the initial package, however, this is not going directly to NGOs but instead is to be delivered through regional Civil Defence Emergency Management Groups. This money is to support local foodbanks, community food organisations and other welfare providers to enable them to provide food and other essential household items, as well as support the further provision of emergency accommodation. Budget 2020 provides for another \$32m to go towards responding to the increasing demand for food banks, as well as establishment of a new bulk food distribution network amongst community service providers to leverage surplus donated food from suppliers that would otherwise go to landfill.

Additional funding to provide long term supportive housing for the homeless

The Government made a pre-budget [announcement](#) that it will spend more than \$100m on housing the homeless until it can put them up in more long-term housing. This includes funding 1600 motel units and more than \$30m of the new funding will be put towards a wraparound service to support those people's needs. Budget 2020 provides for the funding of 2000 transitional homes (to urgently house the homeless) over the next five years, through Kāinga Ora (formerly Housing New Zealand), as well as continuation of the income-related rent subsidy available with eligible community housing providers.

Additional funding for NGOs supporting children in state care

Oranga Tamariki are funding an additional \$1.4m for NGOs that look after children in the government's care.¹ Oranga Tamariki will also consider re-purposing existing funding to support its NGO partners that are incurring additional costs as a result of COVID-19.

Additional COVID-19 funding for community groups serving vulnerable communities

Budget 2020 establishes a \$36m fund to support community groups to respond directly to COVID-19 and its impacts, with a particular focus on those who are from Māori, Pacific, former refugee and new migrant communities.

3. Wage Subsidy (Ministry of Social Development)

The government has provided a wage subsidy to support employers in keeping their employees on the payroll during this challenging time.

It has now been confirmed charities, non-government organisations, incorporated societies and other non-profit organisations may apply for this subsidy if they meet the qualification criteria. Earlier it was not clear whether these for-purpose organisations could access this scheme.

The subsidy supports employers who have experienced a minimum 30% decline in actual or predicted revenue when compared with a similar month last year, as a result of COVID-19. It is calculated with reference to a flat rate of \$585.80 for employees working more than 20 hours per week and \$350.00 for employees working less than 20 hours per week. The wage subsidy is limited to a period 12 of weeks and is paid as a one-off lump sum.² For 12 weeks this amounts to a payment of \$7,029.60 for a full-time employee and \$4,200 for a part time employee.

To be eligible a for-purpose organisation needs to demonstrate revenue decline, proof of 'active steps' and best endeavours to retain its employees.

Budget 2020, in recognition that some businesses and organisations will not be able to operate at Alert Level 2, has committed to a targeted extension of the wage subsidy for a second period of 8 weeks (from 9 June). To qualify, organisations will now need to show (or at least expect to see) a 50% drop relative to last year, unless they are a start-up.

Revenue decline

The organisation will need to confirm a minimum revenue decline of 30/50% for any month between January and June 2020, compared to a similar month in 2019. Revenue for charities and other non-profit organisations includes income from business activities, grant or service funding, mass fundraising activities, and direct donations. The month used for comparison need not be the same month as in 2019 but must be one 'that gives the best estimation of the revenue decline related to COVID-19.'

DIA Charities Services has provided further guidance for charities on this point. If the organisation was only formed in the last 12 months, then revenue will need to be compared with a more recent reasonably equivalent month.³ More specifically, where an organisation has had one month where it traditionally receives a large portion of funding (e.g. large contract), but the next month it relies on fundraising to pay salaries (that has dried up because of COVID-19), it can be the second month that the organisation relies on to show a 30/50% decrease in revenue.⁴

The threshold of a 30/50% loss in revenue may be problematic for some struggling organisations. The national body of community organisations, Social Services Providers Aotearoa, has brought to the Government's attention that there are NGOs who have not yet had this percentage loss in income but still face losses that impede their ability to operate. The Minister for Social Development, Hon Carmel Sepuloni, has recognised this is an important issue and as of 14 April was seeking further advice on this.

Proof of active steps

The organisation must be able to prove that they are taking active steps to mitigate the financial impact of COVID-19. Active steps could include; drawing from cash reserves where this is appropriate; activating a business continuity plan; making an insurance claim; seeking support from a bank; seeking advice and support from a relevant umbrella organisation or a current funder.

Best efforts to keep staff

The organisation must act in good faith and use its best efforts to retain employees for the period of the wage subsidy, which begins from the date of the application. The organisation needs to pay employees at least 80% of their usual

¹ Refer Letter by Hon Carmel Sepuloni, Minister for Social Development to Brenda Pilott, Manager, Social Services Providers Aotearoa, 14 April 2020.

² Work and Income – Wage Subsidy - <https://workandincome.govt.nz/covid-19/wage-subsidy/index.html> and Deloitte, 'Practical information to help you understand COVID-19 entitlements' <https://blog.deloitte.co.nz/articles/practical-information-to-help-you-understand-covid-19-entitlements/>

³ Charities Services Newsletter, April 2020 - Questions on the Ministry of Social Development wage subsidy.

⁴ Andrew Phillips, Charities Services as advised to Steven Moe. Parry Field.

wages, or at least pass on the full amount of the wage subsidy. If the employee normally receives less than the wage subsidy, then it has been advised the organisation should pay them their normal pay and use the remainder to support other impacted staff.⁵

4. Leave Support Scheme (Ministry of Social Development)

The COVID-19 Leave Support Scheme provides payments to employees required to self-isolate under the guidelines set by the Ministry of Health.⁶

Initially the scheme was only available to essential workers but from 28 April, in line with the move to Alert Level 3, it covers all employees in business and other organisations (outside the state sector).

The leave payments are \$585.80 for employees working more than 20 hours per week and \$350.00 for employees working less than 20 hours per week. The payments must be passed on in full to the relevant employees (less taxes and other deductions).

To be eligible the employees must be unable to work from home and must have been expected to work during the leave period. The employee must have been diagnosed with COVID-19, required to self-isolate in accordance Ministry of Health guidelines, or needed to take leave to support dependents in these circumstances.⁷

To be eligible the employers must demonstrate that (1) their ability to support the employee taking leave has been adversely impacted by the COVID-19 public health restrictions, or (2) they have experienced a minimum revenue decline of 30% over the period of a month when compared to the same last year, or a reasonably equivalent month.⁸

If an organisation is eligible for both the COVID-19 Wage Subsidy scheme and COVID-19 Leave Support for the same employee, it may be more appropriate for them to apply for the COVID-19 Wage Subsidy, as this is of longer duration and appears to be more flexible.

5. Volunteering Support (National Emergency Management Agency)

For the next few months the restrictions associated with COVID-19 Alert Levels will limit the availability of many existing volunteers – particularly as many are over 65 and vulnerable to COVID-19.

The COVID-19 National Crisis Management Centre is actively partnering with [Volunteering New Zealand](#) and its regional network of Volunteer Centres to co-ordinate volunteers with organisations in need during this time.

A number of new initiatives are also being planned to expand the pool of available volunteers. One of the first underway is the national volunteer response of the [Student Volunteer Army](#) to recruit and coordinate students in 17 centres to [help support](#) essential grocery and pharmacy deliveries to the elderly, the vulnerable and healthcare worker families. Red Cross have similarly been recruiting young people as drivers.

There are guidelines for organisations working with volunteers under Alert Levels, [here](#) and [here](#), and the latest DIA Charities Services [newsletter](#) has the most recent update supporting volunteering during the COVID-19 Alert Levels.

6. Community Awareness and Preparedness Grant Fund

(National Emergency Management Agency) [*Charities Services Update - 19 May: CAP Grant Fund is now closed*]

In the first \$27m package for essential services provided by the community sector the Minister for Social Development, Carmel Sepuloni [announced](#) a \$4.8m COVID-19 Community Awareness and Preparedness Grant Fund. This grant fund is available to community groups providing essential community-led solutions that support local resilience and community wellbeing during the COVID-19 restrictions.

The fund is not yet fully allocated and [applications](#) for a \$5,000 grant can still be made to the Ministry of Social Development. The grants are one-off and priority is given to [targeted groups](#).

7. Other Government Administered Funds (Dept of Internal Affairs)

For a list of grants and important dates in respect of Government administered community funds refer [here](#), some of which may be under review where reliant on gaming machines and other in-the-community gambling.

⁵ Charities Services Newsletter, April 2020

⁶ Work and Income - COVID-19 Leave Support Scheme - <https://workandincome.govt.nz/covid-19/leave-support-scheme/index.html>

⁷ Employment New Zealand - COVID-19 Leave Support Scheme - <https://www.employment.govt.nz/leave-and-holidays/other-types-of-leave/coronavirus-workplace/leave-support-scheme/#criteria>

⁸ Employment New Zealand - COVID-19 Leave Support Scheme

8. Registration and Reporting Compliance (Dept of Internal Affairs – Charities Services, MBIE, Ors)

Charities Services have clarified the obligations of registered charities and what support is available during the COVID-19 response in a brief [here](#).

Face-to-face AGMs cannot be held during Alert 3 and 4 and Charities Services will not enforce compliance actions that relied on an AGM being held during these times. Other potential reasons for charities missing their filing deadline could be delays with having financial statements audited or reviewed, or the person responsible for filing being personally impacted by COVID-19

If the lockdown has caused delays in filing an Annual Return, and the financial statements, the charity can request an extension for lodgement.

Furthermore, the Government has now passed [legislation to change](#) compliance and reporting provisions in various statutes to help businesses and not-for-profit organisations affected by COVID-19. For example the NZ Companies Office as the registrar of companies, societies and charitable trusts now - (1) has discretion to enable it to issue exemption notices in relation to compliance with statutory obligations that it oversees, (2) can provide relief for entities that cannot comply with rules in their constitutions and rules, and (3) can allow electronic means to achieve compliance when these are not permitted by an entity's rules (such as holding meetings and passing resolutions electronically).

In response to COVID-19 the Government has provided for [debt hibernation](#) to reduce the burden of existing debt for one month, and with agreement of creditors a further six months. During this time creditors cannot force the liquidation of business for failure to pay unsecured debt. Debt hibernation is available to companies as well as societies, trusts and other types of organisations.

9. Sector Specific

The government anticipates COVID-19 having a disproportionate adverse impact on Māori and Pasifika communities – in terms of job losses and consequent food insecurity, housing and health issues - and has provided additional funding in support. The arts, sport and recreation, mental health and those keeping families safe have also been given special support. Impact enterprises may be eligible to access the support offered to business and SMEs.

Māori Communities Support (Te Puni Kōkiri, Ministries of Health & Tourism, Te Arawhiti)

Māori communities and businesses have access to government help that is tailored to meet their specific needs in this crisis, including:

- a Whānau Māori Community and Marae package reprioritising \$10m from Māori Development vote to support vulnerable whānau and hard-to-reach communities;
- a Māori Health and Whānau Ora response with \$30m targeted directly to Māori Health services, including financial support to Māori provider networks, and an extra \$15m to Whānau Ora commissioning agencies. Budget 2020 made a commitment of a further \$136m for Whānau Ora to support whānau and communities most affected from the impacts of COVID-19, and an extra \$11 million to Māori NGOs to support vulnerable whānau;
- Budget 2020 also provides an extra \$40 million to help tackle the housing challenges Māori face, through the MAIHI (Māori and Iwi Housing Initiative) programme (a Government partnership with Māori community housing providers and other Māori and Iwi providers to expand supply and use land for transitional and long term-housing);
- supporting Māori Businesses and engaging with Māori with \$1m of funding to enable a needs assessment for Māori businesses, and \$470,000 to Te Arawhiti (Māori Crown Relations) to engage and work with iwi on their COVID-19 pandemic response plans. Integral to a targeted social procurement strategy Budget 2020 establishes a \$50m Māori trades training fund as part of a wider Māori Employment Package of more than \$200m;
- Budget 2020 supports Māori education with a commitment of \$400 million; including \$200 million of funding for Te Kōhanga Reo.

Pasifika Communities Support (Ministry of Health, Ministry for Pacific Peoples)

The Ministry of Health provided an initial \$17m [package](#) to support Pasifika health and disability services facing increased demand, and to support public health messaging and guidance for Pacific communities in their languages. It also enabled the roll out of a new outreach programme putting non-clinical health support staff into Pacific communities, linking high-risk Pasifika people with important services, with the support of the Pasifika Medical Association and Pasifika Futures.

Funding for Pasifika-focused initiatives announced in Budget 2020, which will also support Pacific for-purpose organisations through a social procurement strategy, include:

- improving housing for Pacific families and communities, up to \$41.3m;
- a Pasifika Culture and Heritage Fund to enable festivals to continue to provide platforms of opportunities to the festival ecosystem, \$12m;
- progressing the establishment of a New Zealand Fale Malae (marae), \$10m;
- the Pacific Aotearoa Community COVID-19 Recovery Funds, \$3m;
- further Pacific education initiatives to be announced, up to \$80.2m.

Ethnic Communities Support (Dept of Internal Affairs - OEC)

The Office for Ethnic Communities at DIA has repurposed the Ethnic Communities Development Fund that helps ethnic communities better connect and take part in society. The standing priorities of the Fund have been suspended to instead support ethnic communities navigate the impacts of COVID-19.

The \$4.2m annual grant fund is now available for projects or activities that provide alternative means of staying socially connected, employment initiatives, and community resilience and recovery. Ethnic groups with legal status (including trusts and incorporated societies) can [apply](#) for over \$10,000 per application.

Ethnic communities for the purposes of this fund includes migrants, former refugees, long-term settlers, and those born in New Zealand who identify their ethnicity as African, Asian, Continental European, Latin American, or Middle Eastern.

Budget 2020 establishes a \$36m fund to support community groups to respond directly to COVID-19 and its impacts, and its particular focus includes those supporting refugee and migrant communities (in addition to those supporting Māori and Pasifika)

Arts Emergency Response (Creative New Zealand)

Creative New Zealand has provided an Emergency Response Package, with an initial commitment of \$16m, to help independent practitioners as well as its major grantees, who get multi-year funding under existing schemes. This funding opened on 14 April, and is to be distributed through to 30 June. For financial support beyond 30 June a follow-on commitment by Creative New Zealand is anticipated.

The initial funding is in the form of resilience grants for the broader arts community, as well as short-term relief for Creative New Zealand's larger 'investment clients' (open to the 83 funded arts organisations in the Toi Tōtara Haemata and Toi Uru Kahikatea multi-year investment programmes).

At the same time as this funding become available, arts organisations are encouraged to take advantage of the wage subsidy and leave support available through the Government's [Wage Subsidy](#) and [Leave Support](#) COVID-19 schemes (extended to provide cover for charities and other non-government organisations).

The 2020 Budget contained no specific reference to a longer-term recovery package for the Arts. It has however been signaled and is to be announced by Prime Minister Jacinda Ardern separately.

Sport Support (Sport New Zealand / IHI Aotearoa)

As part of the immediate financial support for national sport and recreation organisations, Sport NZ partners are not obliged to continue Sport NZ-led initiatives, so they can focus on remaining operational in these times. Current levels of funding have been rolled over to the end of June 2021, with flexibility granted on how these funds are to be used by organisations.

In addition, Sport NZ has announced a \$25m package to provide further short-term relief for sporting and active recreational organisations at all levels of play. The funds have been made available through the re-purpose of Sport NZ's work programme budget, as well as the use of its cash reserves.

The key feature of the latest relief package is a \$15m Community Resilience Fund to help struggling local and regional sport and recreation organisations, as well as endorsed Māori sports organisations. Clubs can apply for \$1,000 in support. Regional Sports Organisations can apply for up to \$40,000. The Fund will be administered and distributed by New Zealand's 14 Regional Sports Trusts. For further details refer [here](#).

Other features of the relief package include; a partner support fund (\$6m) to help Sport NZ and its high performance investment partners maintain critical business functions, an exceptional system support fund (\$1m) to help maintain critical business functions of national organisations who are not normally in receipt of Sport NZ investment; and a physical activity fund (\$3m) to promote active recreation and sport to those who most need it - such as those less active, disabled or who live in high deprivation areas. For further details on the relief package refer [here](#).

The 2020 Budget contained no specific reference to a longer-term recovery package for sport and recreation. Minister Grant Robertson, however, has since announced a \$265m package over four years - commencing 1st July, but with some immediate assistance offered to professional sports. This package is system wide and supports marginalised and under-represented groups, including Māori and Pasifika populations, deprived communities, those with disabilities, and women and girls. The support to be offered as short-term support (\$83m), rebuild support (\$104m) and R&D support to modernise delivery of play, active recreation and sport (\$78m).

School Lunch Support (Ministry of Education)

The Government announced in Budget 2020 that it will allocate \$220m on the free school lunch programme for Year 1 to 8 (primary and intermediate aged) students in schools with the highest disadvantage - feeding an additional 200,000 children (up from 8000 currently) and creating an estimated 2400 jobs. Schools can choose to contract to a variety of suppliers such as local business, cafés, community organisations, marae, or national providers. The extended programme begins in Term 4 and will be fully implemented by mid-2021.

Addiction and Mental Health Support (Ministry of Health)

The national body for community organisations supporting New Zealanders in need of addiction and mental health services, [Platform](#), is providing regular briefs to clarify the support that the Ministry of Health and DHBs are providing for the NGO service providers that they contract with. Recent updates are available [here](#).

Remote Communities Support (Ministry for Primary Industries)

Budget 2020 committed \$20m to improving access to support services for rural and fishing communities in regional New Zealand, many of whom were already challenged by a drought before COVID-19. The funding extends to non-government services for increasing community cohesion, reducing social isolation, enhancing wellbeing - based on the Heartland Services and Information and Advisory Service model.

Family Violence Support (Ministry of Social Development, Oranga Tamariki)

In the March \$27m government package to assist NGOs and community groups the government allocated additional funding to community organisations that partner with Ministry of Social Development to keep families safe from harm and to offer crisis support. For further details refer [here](#).

Budget 2020 has committed to a \$203m Family Violence Services package, which represents the largest funding boost for family violence service providers in over a decade. This is for government and non-government social services to recruit and develop highly capable staff and respond to the increased demands they are facing.

The package funds crisis response services for victims of family violence and provides support services for those experiencing elder abuse, and treatment and help for family violence perpetrators. Funding is also provided for refuge safe houses.

The package includes \$8.6m for 200 domestic violence organisations coping with an increase in COVID-19 related demand.

Disability and Other Health Support (Ministry of Health, Ministry of Social Development)

In response to increased demand Budget 2020 committed an additional \$832m for disability support services to help people with long-term physical, intellectual and/or sensory impairment. The sector has been neglected for some time, and this significant boost will help the sector on sustainable funding path, and in particular non-government organisations that support disabled New Zealanders.

Included in the package is \$43m for community-based participation services. This funding enables community-based service providers, funded by the Ministry of Social Development, to support disabled people to participate in, and contribute to, their wider community, including in vocational and community-based day programmes.

In response to COVID-19 the Budget 2020 committed a further \$37m to sustain laboratory testing capacity and provide additional support for ambulance, aged care, disability, and hospice services in the community.

Water Safety Support (Dept of Internal Affairs - Office for Community and Voluntary Sector)

In an acknowledgement of the critical community work in water safety and the increasingly tough environment to fund raise Budget 2020 has committed to \$62m to Surf Life Saving New Zealand and the Coastguard, which provides these organisations with funding security for the next four years.

Impact enterprise support (IRD, Ministry of Business, Innovation and Employment)

The government has implemented a range of measures to assist businesses through the crisis. The initial measures included the wage subsidy scheme, the business finance guarantee scheme through the bank system, and a package of business tax changes. Additional measures have been introduced to boost confidence and help SMEs (with 50 or fewer fulltime staff) get through the crisis, and these measures, available to impact enterprises, [include](#):

- greater [flexibility](#) for taxpayers in respect of statutory tax deadlines and paying provisional and terminal tax;
- changes to the tax loss continuity [rules](#), and a tax loss carry-back [scheme](#) for eligible businesses expecting to make a loss - to allow businesses to access their previous year tax payments as cash refunds;

- measures to support commercial tenants and landlords;
- further business consultancy support over next 12 months, through the Regional Business Partner Network;
- small business cashflow loan [scheme](#) for eligible businesses and organisations, to help manage fixed costs.

10. Special Mention

The Salvation Army has developed a [Covid-19 Social Impact Dashboard](#) that monitors and assesses the social impacts of the COVID-19 crisis, particularly for the poorest and most vulnerable individuals and families.

For helping your communities access a home broadband connection when cost is a barrier, refer [here](#) to the prepaid not-for-profit service offered by Skinny Jump and its network of community organisations.

During the Alert Levels the team at Hui E! Community Aotearoa has provided [here](#) a matching service to connect community groups to a volunteer grant writer, to help assist with any COVID-19 government grant application.

In support of stronger workable relationships between funders and grantees Kate Frykberg, former Chair of Philanthropy NZ, proposes that funders should adopt a relationship agreement approach, based on mutual responsibility and accountability. This is documented in a revised funding relationship agreement template available [here](#).

Those with time and skills can register with volunteering services, such as at volunteer centres or through platforms like [Help Tank](#) or [Lets Collaborate](#). There are opportunities for skilled volunteering to be contactless such as [Manaaki](#), which in addition to online business expert volunteering also offers opportunity for community advisers to volunteer. More information and lists of connecting services can be found at [Volunteering New Zealand](#).

To help whenua-based businesses examine the current and anticipated impacts of COVID-19 and make decisions about their future Te Puni Kōkiri has commissioned three [reports](#) by Deloitte. These reports will be of interest to other for-purpose organisations as well.

For a global map of solutions created in response to COVID-19 refer [here](#).

Last Wednesday, 13 May, the state of national emergency expired, and a national transition period came into force for 90 days (unless extended or terminated earlier). This will see immediate support transition out of the provision of CDEM Emergency Welfare services (such as 0800 welfare numbers, provision of emergency shelter, delivery of food parcels, support to foodbanks). CDEM and its community partners may continue to provide some CDEM Welfare Services where they assess there is a need, in coordination with Caring for Communities regional partners who are tasked to take a longer-term approach in the response to COVID-19.

The Department of Internal Affairs has postponed its work in modernising the Charities Act 2005 for the next six months. This means no policy work or decisions will be made during the rest of this Parliamentary term. In the meantime, the Minister for the Community and Voluntary Sector and the Department are considering how issues and opportunities relating to COVID-19 might be incorporated into a revised work programme.

11. Keeping Informed

To keep informed as the COVID-19 response evolves refer to the Philanthropy New Zealand [updates](#), the charities forum [updates](#) facilitated by Steven Moe, and the RSM COVID-19 National Resource Centre [hub](#).

For an active list of private and local government grant funds available during the COVID-19 response refer to the [list](#) being compiled by Strategic Grants NZ.

If you have a commercial lease refer to Parry Field tips [here](#) and for other key legal issues refer to its COVID-19 handbook [here](#).

For COVID-19 messages in Te Reo Māori, sign language, and others refer [here](#).

Delivering on a Mission

The mission of the JBWere Philanthropic Services team is “inspire, educate and support of clients in delivering sustainable impact.” In this pursuit we work closely with our “For-Purpose” clients to provide insight and advice that extends beyond investment management, to assist them to achieve their wider strategic objectives and deliver on their mission.

Please visit our [website](#) (philanthropy section) to download our latest research and insight papers.

About the author

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About JBWere Philanthropic Services

Working with charitable and other for-purpose clients has been a key cornerstone of the growth and history of JBWere over its 175 years of existence.

We are the leading provider of philanthropic and investment management advice to the for-purpose sector in Australia and New Zealand. We serve a broad range of purpose-driven organisations, institutions, corporations, families and individuals across a wide range of cause areas - currently entrusted with more than \$8bn in Australia and New Zealand.

We partner with our clients to support them in delivering on their mission, and fulfil our own, through:

- best practice governance;*
- research, education and insight; and*
- tailored strategic advice.*

The multi-disciplinary Philanthropic Services Team, established in 2001, is a key differentiator of the JBWere approach and distinguishes our ongoing commitment to not only assist our clients in meeting their fiduciary obligations to prudently manage their assets, but also help them deliver on their mission.

To discuss how we might be able to work with you please contact your Adviser, or John Morrow, Head of Philanthropy for JBWere NZ, on 09 365 0825 or email him at john.morrow@jbwere.co.nz.