VOLUNTARY SOCIAL SERVICES: A REVIEW OF FUNDING

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The views and opinions in this report are those of the authors and do not necessarily reflect those of the Planning Council.

FOREWORD

Since publication of its report *The Welfare State* in 1979, the Planning Council, along with many other organisations, has advocated a move from the centralised, top-down approach in the design and delivery of social services towards decentralised systems more responsive to local and community needs. A subsequent Council study, *Meeting Needs in the Community*, 1984, examined the implications of such a shift in emphasis, and drew attention inter alia to the point that greater reliance on decentralised voluntary and community organisations would need to be matched by appropriate funding and support systems.

As a further response to this, the Council asked the authors of this report to study the ways in which resources from taxpayers are made available to voluntary and community groups.

The authors, with considerable experience in this field, adopted a consultative approach which has itself helped groups to learn more about government funding programmes. Their report provides a perspective on the services provided by voluntary and community groups, and their interaction with central government, which the Council believes will be valuable, particularly to policy makers and departmental officials.

The authors do not, and were not asked to, resolve the fundamental question of the extent to which central government should rely on voluntary and community groups to identify and provide needed services, nor that of the level of funding which should be provided. Those are questions which should be addressed in the developing public debate on strategic directions for social policy.

As that debate proceeds, this report should serve as a reminder of the variety of ways in which appropriate social services can be made available to those who need them. The traditional welfare state model of services designed, funded and delivered by central government departments is only one of those ways. Particularly in a society undergoing considerable change and increasing its cultural and regional diversity, there is clearly a useful role for a more flexible and decentralised approach through local groups.

The Planning Council wishes to thank Sue Driver and David Robinson for their work; Judith Davey of the Planning Council secretariat for managing the contract; and the many people in voluntary and community groups and government departments who gave their time and co-operation to the project.

Gary Hawke
Chairperson

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1. INTRODUCTION

1.1 Background

The role and effectiveness of the state in funding voluntary social services has long been a subject for debate. Calls for community participation, better co-ordination, and a preventive approach to service delivery have come from organisations such as the Social Advisory Council and the Planning Council. One of the limiting factors in this debate has been the lack of an overview and information on how government is involved in this area.

This research arose out of the Planning Council publication *Meeting Needs in the Community*. As a follow-up to the report, the Council invited government head office staff to meet and discuss the issues raised. At this meeting, selected community groups presented case-study material. The major concern to emerge was funding. The community groups were asking, "How do we find out what is available? Why were we turned down? Why are we sent from one government department to another?"

The Planning Council decided to follow up these questions with further research on government funding to the voluntary social services sector.

Several related studies have been undertaken concurrent with the Planning Council project. The Social Advisory Council has recently completed a study of the relationship between government and voluntary agencies.[1] The Social Welfare Department's Ministerial Task Force on Social Welfare Services has also recently published a discussion document and is calling for submissions. Major reports on the future of sport[2] and recreation[3] in New Zealand were published late in 1985. Although sport and recreation lie outside the scope of this report, some recommendations, such as the introduction of Lotto, impinge on the study. The future of the Lottery Board Distribution Committees and the balance of government and Lottery Board (or Lotto) funding between the sport and recreation and the social and community services areas are vital concerns.

This example of several overlapping but independent reviews highlights in a practical way the difficulty of researching a function of government when there is no government mechanism for ensuring the co-ordination of departmental action or for giving an overview of social policy.

We hope that this report will contribute, from a community perspective, to the continuing development of social policy in New Zealand.

1.2 Aims, definitions and methodology

The project had two broad aims:

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1   *Partnership in Social Service*, Social Advisory Council, 1986.

2   *Sport on the Move*, Sports Development Inquiry, Ministry of Recreation and Sport, 1985.

3   *Recreation and Government in New Zealand - Change in Relationships*, Ministry of Recreation and Sport, 1985.

1.   To document all sources of funds and other assistance from central government to voluntary social services.

2.   To identify the main issues relating to access to resources for voluntary social service agencies.

The task of examining all government funding to the voluntary sector is obviously enormous and some narrower definition was needed for the project. Thus the voluntary social service sector is defined as non-profit-making, non-government groups with a primary focus on health, education or welfare. For brevity, such groups are sometimes referred to below as the voluntary sector, or voluntary agencies. The study has not sought out groups whose major focus is recreation, employment or culture. In addition, it is the perspectives of the smaller, locally-based groups which are emphasised. This is primarily because these groups find it more difficult to have their views heard than the larger nationally-based organisations. In the discussion which follows, smaller locally-based groups are referred to as community groups. They are part of the voluntary social services sector, but differ in many ways from the larger nationally- or internationally-based organisations.

The study has, however, been extended to include government assistance other than finance, such as advice and secondment, on the basis that such assistance is important to the voluntary sector. Secondly, the Lottery Board has been included as part of the research. Lottery Board distribution committees are administered through government departments, and are generally seen as part of government by voluntary agencies.

The project does not cover services provided directly by government to the consumers, to the profit-making sector, or to quasi-government agencies, such as the Rehabilitation League. Thus it does not present conclusions on the overall effectiveness of the state in the delivery and funding of social services.

Information was derived from three main sources:

- data on financial and non-financial resources available from government departments;
- views of voluntary sector people about these resources and the ways in which they are delivered;
- views of departmental officers about resources and their delivery.

Information was gathered from current estimates of government expenditure and departmental pamphlets on funding sources. Discussions were held with officers who administer departmental funds, including workshops in Auckland, Christchurch and Wellington.

The process of consultation with voluntary agencies started with an explanatory letter informing them about the project, asking for their comments and also requesting to be kept in touch through their newsletters. Secondly, several national co-ordinating bodies were visited - the Federation of Voluntary Welfare Organisations, Council of Christian Social Services, National Association of Citizens Advice Bureaux, and Age Concern. Finally, the major part of the project was a series of visits, chosen to include large and small urban centres and rural areas; a balance between the North and South Islands; populations of Maori and Pacific Islanders and an area affected by a "Think Big" project. Community workshops and discussions were held in Auckland, Wellington, Christchurch, Nelson, the West Coast (Westport, Greymouth, Hokitika and Whataroa), New Plymouth, Hastings, Hamilton and Whakatane.

Workshops were arranged through local people to ensure that invitations were sent out to a wide variety of groups in each area. The numbers attending each workshop were limited to around 25 in order to encourage maximum two-way participation and information sharing, and to provide the opportunity to explore in detail agencies' viewpoints and concerns. A standardised format was used for the workshops. The information gathered was written up and then fed back to the participants for their comments and alterations as well as for wider distribution to other local groups.

The methodology for the project was based on the premise that social research should not leave those researched in a poorer position but should aim to improve their situation through an exchange of information. Thus a special effort was made to provide groups with information on sources of funding. In addition, workshop participants and others contacted during the project were kept informed of the project's progress through three newsletters.

2. CURRENT FORMS OF ASSISTANCE FROM GOVERNMENT DEPARTMENTS

Departments currently involved in directly funding the voluntary sector are Social Welfare, Internal Affairs, Justice, Health, Education, Maori Affairs and Women's Affairs. Others have no direct involvement, but influence the amount and type of assistance through their legislative, administrative and financial functions; for example, Treasury and the State Services Commission. Treasury's influence was often suggested as a factor restricting the ability of departments to fund the voluntary sector. From Treasury's point of view, however, it is a case of applying the policies of compensatory savings and expenditure restraint.

The aims and objectives of government departments are set down in statute. Objectives and activity statements also accompany departmental estimates of expenditure. These tend to be broad, allowing for considerable flexibility. Some 1984/85 examples are:

- Department of Social Welfare, Social Work Service Objective (c):

    To promote and maintain a preventive work, social work and general counselling service for persons and families facing social and economic difficulties.
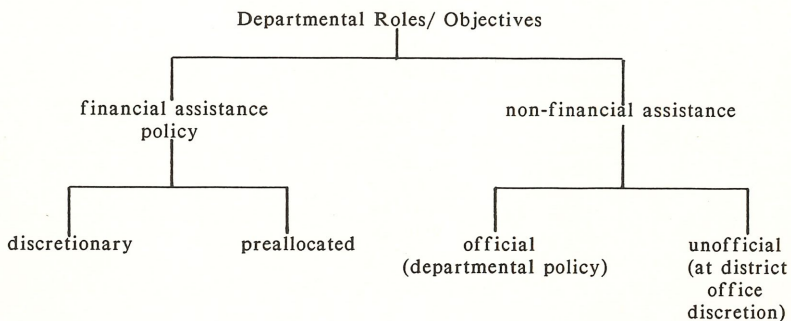
- Department of Internal Affairs, Recreation, Arts and Youth Section, objectives:

    i) To promote the development of integrated communities in which all individuals and groups may fully participate;
    ii) To encourage communities to provide a range of services and facilities which will enable their citizens to use leisure time to realise their full potential.

Departmental objectives exhibit a clear potential for overlap in responsibilities. Several departments, for example, have mandates to be involved with youth or families. There may also be gaps - no department has clear responsibility for the welfare of the elderly in the community.

Provision for voluntary agencies may take the form of either financial or non-financial assistance. The latter, which is of considerable importance, but often overlooked, may be on either an official or unofficial basis (see diagram). Financial assistance may also be broken down into two categories. Preallocated funds are those earmarked for a particular agency and provided on an ongoing basis. Discretionary funds are those which any group or agency may apply for, usually in competition with others.

Departmental Roles/ Objectives

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                    Departmental Roles/ Objectives
                                 |
          ┌──────────────────────┴──────────────────────┐
  financial assistance                          non-financial assistance
       policy                                            |
          |                                              |
    ┌─────┴─────┐                              ┌─────────┴─────────┐
discretionary  preallocated                 official           unofficial
                                         (departmental       (at district
                                            policy)             office
                                                                discretion)
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2.1   Financial assistance

The main sources of government financial assistance to the voluntary social services sector are direct grants and subsidies.[1]

There are three ways in which funds can be set up. These are:

- in reaction to lobbying from a particular sector group;

- through government policy based on perceptions of need;

- through a systematic process of evaluating
  (a) current and changing community needs, and
  (b) the type of services needed to meet these.

The first two methods are operating currently in New Zealand. An example of the first type is funding for Women's Refuges and Rape Crisis Centres. The second method may entail government funding voluntary agencies to implement its policy. Funds for groups to work with offenders under the Criminal Justice Act (1985), administered by the Justice Department, are an example of this.

Both gaps and overlaps can arise from these methods of funding. As already mentioned, there is no departmental funding source specifically for work with the elderly in the community. Thus a group such as the Marsden Club in Wellington, which provides day-care for the elderly, has had difficulty in gaining assistance from any government department. On the other hand, Social Welfare, Internal Affairs, Maori Affairs and the Police Department all have funding programmes directed towards youth.

There is at present no government body responsible for the *assessment* of community needs, for the determination of appropriate government assistance or for the evaluation of government policy from a supra-departmental perspective.

Table 1 sets out how much and in what areas departments allocate grants. For the 1985/86 financial year, $75,379,000 was voted to the voluntary sector. The Social Welfare and Health Departments are traditional funders of voluntary agencies and each

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1   This study covers assistance to the voluntary sector only, but government also makes grants and subsidies available to the profit-making sector and quasi-government agencies. Subsidies paid to individuals to provide access to voluntary agency services are another source of indirect assistance to the voluntary sector, e.g. benefits and subsidies to those in rest homes and those using childcare centres. In addition, donations to the voluntary sector are encouraged through the provision of tax deductibility. This is an important source of revenue for the larger agencies. Finally, the Broadcasting Corporation, a quasi-government agency, facilitates fundraising through providing time and facilities for telethons. Telethons have had a major impact on the voluntary sector, particularly in the setting up of new agencies, yet the process for deciding which particular sector will receive assistance has been unclear and not subject to open community debate.

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TABLE 1

Government grants to the voluntary social services, by department

(Note: the information in this table was drawn from the annual Estimates of Expenditure. It does not include monies going to individuals or monies specifically for the cultural, recreation or employment areas.)

Department	84/85 (voted)	85/86 (voted)
EDUCATION		
Playcentres	2,048,000	2,241,000
Kindergartens[1]	2,629,000	2,880,000
Other Pre-school	200,000	220,000
Country Women's Co-ordinating Committee	5,000	6,000
Federation of Parents' Centres	10,000	13,000
Friends of the Deaf Society	20,000	20,000
National Council for Adult Education	123,000	184,000
Royal New Zealand Foundation for the Blind	3,325,000	3,665,000
Federation of Deaf Children	1,000	1,000
New Zealand Workers' Educational Association (WEA)		6,000
WEA District Councils		195,000
Otara Neighbourhood School Scheme	24,000	20,000
Playcentre Federation	7,000	9,000
Wairarapa Community Action Programme	257,000	274,000
Adult Literacy Association	7,000	40,000
NZ Free Kindergarten Union	8,000	9,000
WEA Trade Union Postal Education		30,000
	8,664,000	9,813,000
JUSTICE		
Marriage Guidance Council	822,000	945,000
Prisoners' Aid and Rehabilitation Society	433,000	493,000
Community Organisations	250,000	450,000
	1,505,000	1,888,000

Department	84/85 (voted)	85/86 (voted)
INTERNAL AFFAIRS		
Recreation and Community Development	3,280,000	3,284,000
Capitation Grants	110,000	110,000
Detached Youth Workers	472,000	521,000
Youth Initiatives Fund	210,000	
Small Grants	16,000	16,000
Physical Welfare	140,000	140,000
Section 93	7,000	
Regional Youth Councils		12,000
Youth Training Scheme		210,000
	4,235,000	4,293,000
HEALTH		
Family Planning	1,993,000	2,188,000
Plunket	8,538,000	9,355,000
Community Health Initiatives Fund Scheme		150,000
National Society on Alcoholism and Drug Dependence	16,000	16,000
Aids Support Network Trust		100,000
Approved Institutions	3,278,000	3,551,000
Rest Homes[2]	6,818,000	8,145,000
	20,643,000	23,505,000
SOCIAL WELFARE		
Social Work Services[3]	4,499,000	6,963,000
Residential	3,529,000	3,435,000
Rehabilitation	18,589,000	20,897,000
	26,617,000	31,295,000
MAORI AFFAIRS		
Te Kohanga Reo		2,095,000
Maori Councils and Associations	136,000	145,000
Whanau Development Grants	350,000	269,000
Tu Tangata	251,000	301,000
Community Officers	54,000	54,000
Maori Community Work	21,000	21,000
Marae Subsidies	1,101,000	1,178,000
Welfare of Pacific Islanders	5,000	5,000
Maori Women's Welfare League	30,000	32,000
	1,948,000	4,100,000

Department	84/85 (voted)	85/86 (voted)
WOMEN'S AFFAIRS		
Project Fund	25,000	35,000
	25,000	35,000
INTER-DEPARTMENTAL		
Community Education Initiatives Scheme	450,000	450,000
	450,000	450,000
TOTAL	$63,907,000	$75,379,000
LABOUR DEPARTMENT:		
Estimated Contribution to the voluntary community and welfare sector		30,000,000
LOTTERY BOARD:		
Welfare Services Distribution Committee	2,515,000	2,415,000
Welfare of the Aged Distribution Committee	825,000	825,000
Youth Services Distribution Committee	1,050,000	850,000
General Purposes Distribution Committee		
- Community Development	380,000	380,000
- Community Facilities, Schools		1,100,000
Section 93 Funding		1,178,000
	4,770,000	6,748,000

1   Kindergarten teachers are state servants and their salaries are not included in this amount.

2   Health Department grants to hospitals and rest homes are available to the profit- as well as non-profit-making sector.

3   DSW grants for childcare-trained staff and training courses are available to profit-making as well as non-profit-making groups.

The proportion of grants going to non-profit-making groups is not available from the departments concerned.

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makes a major contribution. Normally the Labour Department would not be considered a provider of assistance. However, after changes to the subsidised employment schemes were announced last year, it became clear that a large number of agencies were using the schemes for setting up or continuing a service rather than as a means of providing work for the unemployed. Our own estimates and, at a later stage, those by the Labour Department, suggested that approximately $30m in the current financial year was going into the voluntary sector by way of subsidised schemes. This is currently 40% of the total grants from government to the voluntary sector. It is clear that any substantial changes to the schemes will have an immediate impact on voluntary social services in New Zealand. This particular issue is expanded upon later.

2.1.1   Analysis of grants

Government funding is analysed in three ways: firstly whether a fund is *preallocated* or *discretionary* (Table 2). Secondly, funds are presented by *category* - pre-school, family, youth, aged, disabled, general or specific (Table 3). Funds were categorised according to their stated purpose as laid down by the department administering the fund.

Thirdly, discretionary funding is analysed according to *purpose* - salaries and/or related expenses, buildings, capitation, budget contribution or general. This is shown in Table 4.

It would have been of interest to categorise funds according to whether the focus was developmental, preventive or remedial. However, the orientation of funds is often not clearly defined or covers two or three of the categories. Despite this, as a general rule, preallocated monies tend to be orientated towards remedial services and discretionary funds towards developmental and preventive programmes. This is particularly apparent with Social Welfare's funding programme.

Discretionary/Preallocated funding (Table 2)

Out of a total of just over $75m going to the voluntary sector, $51m or 68% is preallocated. Education, Health and Justice preallocate most of their grants, whereas Social Welfare has a more equal balance between the two forms of allocation. The Lottery Board Distribution Committee Funds are all discretionary.

There are several implications of preallocated funding:

- In the long term, *organisations* rather than *services* are funded. When an agency originally receives funding it does so in order to meet a particular need in the community. With time the allocation becomes a permanent vote item. This sets up an expectation, so that, regardless of changing community needs or the appropriateness of the agency to provide the relevant form of service, departments become committed to ongoing funding of the agency. Funding therefore becomes institutionalised and politically very difficult to withdraw or reduce.

TABLE 2 [1]

**Allocation of funds by department -
preallocated or discretionary**

Department	Preallocated Funds	Discretionary Funds	Total
Social Welfare	16,239,500	15,055,500	31,295,000
Education	9,593,000	220,000	9,813,000
Health	23,355,000	150,000	23,505,000
Internal Affairs	262,000	4,031,000	4,293,000
Justice	1,538,000	350,000	1,888,000
Maori Affairs	231,000	3,869,000	4,100,000
Women's Affairs		35,000	35,000
Inter-departmental		450,000	450,000
TOTAL	$51,218,500	$24,160,500	$75,379,000

LOTTERY BOARD:

Youth Services		850,000	
Aged Persons		825,000	
Welfare Services		2,415,000	
General Purposes -			
Community Development		380,000	
Community Facilities in Schools		1,100,000	
Section 93		1,178,000	
TOTAL		$6,748,000	

1   The figures in this table were derived from a combination of the 1985/86 Estimates of Expenditure, departmental papers, and discussions with departmental officers.

TABLE 3
Allocation of funds by department - category of use
(From 1985/86 Estimates of Expenditure, departmental papers and officers)

Department	General (000)		Early Childhood Education (000)		Family (000)		Youth (000)		Women (000)		Elderly (000)		Disabled (000)		Specific (000)	
	Pre	Dis	Pre	Dis	Pre	Dis	Pre	Dis	Pre	Dis	Pre	Dis	Pre	Dis	Pre	Dis
Social Welfare	144	400	28	2,724*	1,028	4,689	54	313	17				14,911	5,914	57.5	1,015.5
Education	274		5,139	220	13				6				3,686		475	
Health		150			9,355						8,145**				5,855	
Internal Affairs		3,284					262	747								
Justice					945										593	350
Maori Affairs	199	21		2,095		269		301	32							1,183
Women's Affairs										35						
Inter-departmental		450														
TOTAL	617	4,305	5,167	5,039	11,341	4,958	316	1,361	55	35	8,145		18,597	5,914	6,980.5	2,548.5

LOTTERY BOARD

	General (000)						Youth (000)						Disabled (000)		Specific (000)	
	Pre	Dis					Pre	Dis					Pre	Dis	Pre	Dis
Youth service							1,850						825			
Aged persons																
Welfare service	2,415															
General purposes - community development	380															
community facilities in schools															1,100	
Section 93	1,178															
TOTAL	3,973						1,850						825		1,100	

*   DSW grants for childcare-trained staff and training courses are available to the profit as well as non profit-making sector.

**   Health Department grants to rest homes are available to the profit as well as non profit-making sector.   **Pre = Preallocated**

Note: The proportion of grants going to non profit-making groups is not available from the departments concerned.   **Dis = Discretionary**

- Preallocated funding reduces the departments' ability to respond to changing community needs and alternative means of service delivery.

- If a new service is developed which has similar aims and objectives to an organisation receiving ongoing funding, it has no access to those monies. For example, New Mothers Support Groups are not eligible for Plunket Grants, youth houses for Youthline funding, disabled living centres for New Zealand Society for the Intellectually Handicapped (IHC) grants, alternative childcare groups for Playcentre or Kindergarten grants.

- Generally, some alternative discretionary source of funding is available, but many groups are dissatisfied with this because the competition for these limited funds is great and there is no guarantee of ongoing funding.

- Most preallocated funds have been established for a number of years. Discretionary funding, on the other hand, tends to be a more recent development focussing on areas not currently covered by agencies receiving preallocated monies. Social Welfare during the last year has created six new funds, only one of which has gone directly to an agency (Youthline Auckland). This reflects changing community concerns and changing forms of service delivery (e.g. the increase in small, locally-based groups). There may also be a reluctance on the part of departments to be drawn into further ongoing funding commitments or direct departmental service delivery.

Almost all the groups consulted asked for assured ongoing funding but also criticised the large amounts of money tied up in long-term preallocated funds. A solution to this apparent contradiction would be to build a regular review system into any preallocated funding. This should include consultation with the service consumers to ensure that community needs are being funded rather than just the organisational needs of the agencies themselves.

Funding by category (Table 3)

The categories of funding which have been defined are pre-school, family, youth, women, aged, disabled, general and specific.

Currently $24.5m[1] is being provided for the care of the disabled by voluntary agencies. Excluding Labour Department subsidised employment schemes, this is 32.5% of the total amount of monies going from government to the voluntary sector. $16.3m goes to agencies funding family-orientated programmes (22%) and $10.2m to pre-school activities (13.5%).

The category labelled specific, totalling $9.5m, indicates a recent tendency to target specific forms of service delivery. Funding of women's refuges and budget advisory services are examples. Although this enables government to ensure particular service needs are met, it can be restrictive in terms of changing needs and where services are multi- rather than single-purpose.

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[1]   This does not include the $6m to the Rehabilitation League which is a quasi-government agency.

Funding purpose (Table 4)

The intended use of discretionary funding is depicted in Table 4. Funds specifically for salaries and related expenses total $8.3m, a third of total discretionary funding. A slightly larger amount is provided for broad-based funding which can include applications for salaries or volunteer expenses as well as for equipment, printing and other project or organisational costs. Funding specifically for buildings is available from the childcare, children's homes and disabled programmes of the Department of Social Welfare and the marae subsidy programme of Maori Affairs. The capitation subsidy is confined to Department of Social Welfare children's homes and disabled programmes and is paid on the basis of the number of children/disabled in residence. The budget contribution scheme relates to one source of funding only - the Social Rehabilitation Subsidy Scheme. This fund provides assistance to organisations on the basis of a budgeted deficit.

Wyn[1], in her review of funding by the Department of Social Welfare, covers some of the strengths and weaknesses of these various forms of funding. The two major themes to emerge from her work are that the very act of making funds available for voluntary agencies influences the services provided, and the lack of a departmental funding philosophy contributes to the haphazard and ad hoc nature of the current range of funding. More specifically, she comments that capitation subsidies lead to an emphasis on numbers in care which can be at the expense of quality of care. Also, capitation subsidies do not recognise alternative forms of care. Salary subsidies of less than two-thirds can create unreasonable pressure on voluntary agencies to raise the balance. In addition, grants for salaries create a demand for ongoing funding even when provision is not made for this.

2.1.2   Funding by department (Table 2)

Social Welfare

Excluding the contribution of the Labour Department, the Department of Social Welfare is the major provider of funds to voluntary social services. $20.8m of its $31.3m grant is for the disabled and most of this ($14.9m) is preallocated and used for institutionalised and curative service delivery. The New Zealand Society for the Intellectually Handicapped receives $14.3m of this amount, predominantly for residential, workshop and educational services. Such services for the disabled are an example of the government contracting out and not being involved in direct service delivery.

Only 2.4% of the Department's expenditure is spent on social work services with the bulk going on transfer payments. Social work services expenditure that is paid to the voluntary sector in the way of grants amounts to 0.62% of the total budget, over half being preallocated for "contract" services, leaving only 0.3% as discretionary funding.

With the move of childcare to the Department of Education, Social Welfare's primary discretionary funding emphasis will be on the family through the Tuhonohono Fund (Section 3.5) and Family Services Programmes. The Department's major use of discretionary funding is for salaries, either through grants or subsidies. Since it is discretionary money there is no guarantee of ongoing funding.

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1   Wyn, H., *Government Funding of Voluntary Welfare Agencies: A Review of Funding by the Department of Social Welfare,* Department of Social Welfare, June 1984.

TABLE 4

Allocation of discretionary funds by department - purpose of funding
(From 1985/86 Estimates of Expenditure and departmental papers)

Dept	Salary &/or Related Expenses	Broad Funding (Incl. volunteer expenses, equip, salaries)	Building	Capitation	Budget Contribution	Total
	$(000)	$(000)	$(000)	$(000)	$(000)	$(000)
Social Welfare	7,806	1,776.5	2,129	2,896	448	15,055.5
Justice		350				350
Health		150				150
Maori Affairs		2,691	1,178			3,869
Internal Affairs	521	3,510				4,031
Women's Affairs		35				35
Education		220				220
Inter-Departmental		450				450
TOTAL	8,327	9,182.5	3,307	2,896	448	24,160.5
LOTTERY BOARD		5,923	825			6,748

During the consultation process it was clear that many groups had a significant health component in their services yet they were funded by other agencies such as Social Welfare, Internal Affairs or the Lottery Board. Community houses, women's health centres, community health centres, some adult education programmes, day-care centres for the elderly and the Schizophrenia Fellowship are examples of services which have a major health component yet do not receive any direct Health Department funding. Occasionally, groups have managed to receive funding through Hospital Boards which in turn receive their grants from the Health Department.

At the Planning Council meeting in 1984 to discuss *Meeting Needs in the Community*, the Health Department stated "...there have been several developments in the delivery of health services that attempt to put greater emphasis on *health* as opposed to *ill-health*, or non-institutional care, and on facilitating community accessibility to and involvement in care services...". This appears to indicate a commitment to community health as opposed to ill-health. Yet curative care still receives almost all the Health vote of $2,139m. A realistic commitment to community health should, in the medium- and long-term, reduce the demand on the ill-health system. However, health systems appear to be more susceptible to pressure from medical professionals whose prime focus is on the maintenance of institutional curative services.

Community groups can apply to the Health Department's discretionary Community Health Initiatives Fund Scheme (CHIFS). This amounts to $150,000 (0.007% of total departmental budget). The Department also makes grants to organisations such as the Plunket Society ($9.3m) and the New Zealand Family Planning Association ($3.8m) and provides smaller amounts to groups such as the AIDS Network. Approximately 0.55% of the departmental budget goes to the voluntary sector for preventive health care. Other grants to the voluntary sector go towards the capital costs of organisations such as the Wellington Home of Compassion which runs a hospital, and rest homes.

In terms of its objectives, the Department has scope to expand its developmental role. For instance, one of the objectives of the private hospitals and rest home activity of the Department is "to provide services that will enable elderly or infirm people to successfully live in the community rather than an institution". The Marsden Club in Wellington sought financial assistance for the operation of a day-care centre for the elderly. They were told by the Department that there was no funding available for such projects. Although the club's functions fell within the departmental objective, the vote item appears to be reserved for institutional care.

Most of the Department's budget is dispersed to hospital boards and it can be appropriately argued that grants to community health projects should be funded from this source. In past years, the Beer and Tobacco money (an additional tax surcharge on alcohol and tobacco) administered by hospital boards was available to community groups. This has now been absorbed into the boards' total grants but was mainly used for community-based ill-health services such as domiciliary services and mobile clinics. Voluntary groups may still apply to hospital boards for financial assistance. Some groups have successfully done this but many have found the process too difficult and given up. It is important for community groups to know that it is possible. [1]

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[1]   The Manaka Community House in Nelson negotiated a grant with the local hospital board. The Waiora Project in South Auckland was successful in obtaining a grant of $500,000 from the Auckland Hospital Board.

It is hoped that the current health benefits review will give due regard to the importance of health as opposed to ill-health issues, and recommend ways in which an improved funding balance between developmental and curative care can be achieved.

Internal Affairs

Although the Department's objectives in the youth, recreation and arts areas are broad, in reality it has minimal financial resources for groups to carry out these objectives. Its main activity relevant to health, education and welfare is funding youth groups - both the more traditional, such as uniformed groups, and the non-traditional, such as detached youth workers. The Department also disperses some $3m each year via the Local Recreation and Community Development Fund. This is distributed and administered by local authorities for recreation, sport, cultural and welfare projects. Removing this fund leaves only $1m per annum for distribution to voluntary social service groups. The Department has a high profile in community development and community work, which raises expectations, but these are not matched by financial resources.

The Department has a major role in administering the Lottery Board and servicing its Youth Services Distribution Committee and the General Purposes Distribution Committee. Many voluntary groups mistakenly believe that funds from these committees are government monies. This is particularly true for the Community Development Fund (part of the General Purposes Committee). It is of concern that the Department's objectives, which are not being met through vote funding, are being met through Lottery Board funding. This issue was raised in the Wong [1] report and is referred to in more detail in discussion of the Lottery Board.

Justice

Over the last few years the Justice Department has been moving away from institutional to community-based sentences. The success of these will depend upon the quality of the partnership between the Department and voluntary groups. Many groups have seen this move as a cost-cutting one rather than a genuine alternative policy. This is highlighted when one compares the $350,000 of community organisation grants, which is available only for out-of-pocket, travel and similar small-scale expenses, with the cost of around $18,000 per year to keep one offender in prison.

Overall, Justice Department funding of the voluntary sector is based on financing projects which closely fit departmental objectives rather than programmes defined by the community. An example of this policy is the contracting of groups such as the Prisoners' Aid and Rehabilitation Society (PARS) to carry out prison visiting and providing family support.

Maori Affairs

The Department's contribution to the voluntary sector has increased in recent years with the development of Te Kohanga Reo (Maori language nests) and other programmes geared towards youth and the whanau. However, the Department's centralised funding

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1   Wong, H., *Report of the Review of the New Zealand Lottery Board and Associated Vote Funding of Organisations and Schemes,* Department of Internal Affairs, February 1984.

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programmes are likely to be phased out with the move towards localised distribution of funds. In the system currently being introduced, all departmental funds will be progressively allocated through tribal networks, with decisions being made at the local level. Departmental officers will be available to provide advisory services to these groups.

Currently, major emphasis is being placed on the effective use of employment-related resources, including the Maori Enterprise Development Fund, in order to provide cultural facilities and services which will eventually reduce the need for many social service and welfare programmes. The intention is to meet both employment and social service needs with a co-ordinated approach.

One of the anomalies of the Department's funding scheme is the $5000 for the welfare of Pacific Islanders. For a number of years the Department has had no direct responsibility for non-Maori Polynesian groups, yet this fund, despite its small size, gives an impression of responsibility. No other department has social service or welfare funds specifically targeted towards Pacific Islanders. The Ministry of Pacific Island Affairs is responsible for administering a new employment-related fund established in 1985, the Pacific Island Enterprise Development Fund, but this is not available for social services.

Women's Affairs

As with the new Ministry of Pacific Island Affairs, the Ministry of Women's Affairs is primarily concerned with policy rather than funding or service delivery. However, it does have a small discretionary fund of $35,000 to disperse, and the demand on this fund shows that many women's groups look towards the Ministry for financial support. For the current financial year, the demand for funds was seven times greater than the amount available. The aims of the Project Fund are to promote equality of opportunity for women, to enhance their status and well-being, and to meet needs not already being met by other means. Projects given funds include the Nelson Rape Crisis Centre, the Porirua Hospital Creche Committee and the Dunedin Women's Resource Centre.

Education

Most of Education Department's funding to the voluntary sector is preallocated and focussed on the disabled, continuing education and early childhood services.

The move of childcare responsibility to the Education Department means that all early childhood services come under the one department. At present, most of the Department's funding is preallocated to the kindergarten and playcentre movements. With the increase in alternative community-based pre-school services throughout New Zealand, however, such tying up of money is questionable.

Prior to taking responsibility for childcare services, the Department allocated 0.32% of its total budget as grants to the voluntary sector, with 0.008% being available in the discretionary category.

The Department's support for groups working with the disabled, notably the blind and deaf, is an example of inter-departmental funding. Social Welfare provides money in this area as well. This recognises the multi-purpose nature of such services, but means that agencies have to negotiate with two departments.

Finally, the Department of Education also funds continuing education. This money is preallocated and largely targeted towards national bodies such as Workers' Educational Association (WEA) and the National Council for Adult Education (NCAE).

Labour

The Labour Department has been the major funding agency for the voluntary social services during recent times. The extent of the Department's contribution was highlighted when the Labour government announced significant changes to the schemes which involved the phase-down of the Voluntary Organisation Training Programme (VOTP) and Project Employment Programme (PEP) schemes. An analysis of the schemes revealed that over $30m was going into voluntary social services as wages via the Labour Department. For several years, community groups which had not been funded from other sources had used the departmental schemes to deliver services.

The advantages of the Labour Department schemes were:

- funds were available for salaries and associated costs, which are the major funding needs of the sector;

- decisions were made locally by district offices which meant that groups had easy access to decision-makers and also to faster decision-making;

- criteria were broad and encompassed multi-purpose programmes, as well as accommodating more innovative projects which in many cases would not fit any other funding criteria.

The disadvantages of the schemes were:

- the regional disparity which occurred in funding projects and agencies;

- the restriction on the employment of individual workers to six or twelve months, depending on the scheme.

The government has partly compensated for the changes to the Labour Department schemes with the creation of the Community Organisations Grants Scheme which will be in operation in late 1986 and have a budget of $20m. Of this, only $8.5m will be discretionary funding, so some advantages of the Labour Department schemes will be lost (Section 3.1).

Lottery Board

The Lottery Board allocates lottery profits through six distribution committees: Welfare of Aged Persons, Welfare Services, Youth Services, Medical Research, Scientific Research and General Purposes (Table 2). In addition, allocations can be made to three distribution agencies: Queen Elizabeth II Arts Council, New Zealand Film Commission and the Minister of Internal Affairs - for charitable purposes not provided for under the six distribution committees (Section 93 of the Lottery Board).

The Welfare of the Aged and Welfare Services committees are administered by the Department of Social Welfare, and the Youth Services and General Purpose committees by Internal Affairs. These four distribution committees together with the Section 93 agencies are those providing resources to the voluntary social services sector. All of

the Lottery Board's funds are discretionary. Helene Wong found that, in the seven year period covered by her review (1976/77 to 1982/83), the total amount of funds available increased five-fold, from $3.2m to $15.5m. However, the pattern of funding for the voluntary social services revealed something quite different. Welfare of the Aged Committee funding decreased from 15% of the total to 7%, and the Welfare Services Distribution Committee from 17% to 12%. Increases were achieved in the research and arts fields. During the seven-year period, a significant proportion of social service funds were used for administration and other running costs.

The most disturbing feature of the investigation was the extent to which the Board funded statutory and quasi-government agencies. For example, funding from the Lottery Board to the New Zealand Council for Recreation and Sport went from nil funding to 41% of the funding in 1982/83, the Litter Control Council from 67% to 85%, and the Queen Elizabeth II Arts Council from 22% to 43%. With these increases came a decrease in Vote funding to these bodies from Internal Affairs. At issue here is government's financial responsibility to statutory and quasi-government agencies. By increasing the funding of these bodies from the Lottery Board, existing support for the development of social services is significantly reduced.

Because of the increasing demands for their funds, at least two of the distribution committees - the Welfare of Aged Persons and Welfare Services - have recently reviewed their ongoing funding for groups. This issue is developed further below.

2.1.3   Adequacy of financial assistance

In the 1985/86 financial year, $75.4m was allocated through grants and subsidies to voluntary social services (Table 2). The adequacy of this is very difficult to assess, beyond comparing amounts requested with total amounts available from funding sources. Some groups certainly ask for more than they need or apply to several sources for funding, but the comparison is still of use.

- In 1985, CHIFS requests totalled $800,000; the amount allocated was $150,000.
- In the 1985/86 financial year Women's Affairs had requests for grants totalling $250,000 with an available amount of $35,000.
- In 1985 there were requests totalling over $1m for the $400,000 available through the Department of Social Welfare Tuhonohono Fund.
- Just over $30m dollars went from the Labour Department to the voluntary sector for social services in 1985. This is 40% of what is currently available from other departments (Table 2) and is perhaps the most significant indication of the demand for resources.

In addition, it is almost impossible to assess the amount of non-government funding for voluntary social services (donations, bequests, etc.) to set against government contributions. This type of data can only be found through the annual reports of individual organisations.

2.2   Non-financial assistance

Although there are a number of non-financial sources of assistance available, either officially or unofficially, these are not listed in written statements and are usually discovered either by chance or in discussion with departmental officers. The extent to which this type of assistance is available varies between departments and between offices. It depends very much on the degree to which departmental officers are involved

with community groups. If knowledge of this assistance were more widespread, demand for it would increase and possibly cause embarrassment to the departments concerned, leading to its withdrawal. However, at the moment some community groups are enjoying an advantage over others which could be seen as unfair.

Non-financial forms of assistance are therefore included in this analysis, at least in outline, in the interests of fairness and more equal access to information and resources.

Forms of non-financial assistance fall into six areas:

- advisory/information and support services
- buildings and equipment
- administration
- meeting of costs (e.g. volunteer expenses)
- training
- secondment of staff.

2.2.1   Advisory/information and support services

Voluntary agencies often want advice on organisational issues, to help maintain or develop their service. Government departments have a resource of personnel experienced in a variety of areas but their duties generally do not include this kind of assistance. Internal Affairs advisory officers are the most notable exception. They have a high profile in their communities and are assisted by departmental literature which makes their service known. Unfortunately, the advisory officers are required to cover large regions and to that extent the services have been promoted beyond what is practically possible to cover. For example, the two advisory officers in Christchurch are responsible for the Canterbury, northern South Island and West Coast regions. Department of Social Welfare Auckland Regional Office has workers employed specifically to liaise with voluntary agencies, particularly those applying for funding, but this service is not widely known.

The research found a number of examples where officers are providing advice and information to groups on their own initiative rather than as a departmental function, and this is often in addition to the officers' normal duties.

2.2.2   Accommodation and equipment

Departments such as the Ministry of Works and Lands and Survey have surplus buildings which they make available to groups pending a decision about the future of the building. Rentals vary considerably from peppercorn amounts to commercial rates and seem to be heavily influenced by the persistence of the local group.

A number of voluntary agencies have long-term leases through an emergency housing scheme run jointly by Social Welfare, Housing Corporation and local authorities. Under the scheme, the Housing Corporation has allocated a certain number of houses around the country for voluntary agency use. Local DSW officers and local authorities are generally approached by groups such as women's refuges for one of these properties. The local authority handles the administration and maintenance of the house and rent tends to be minimal. A number of buildings formerly used for periodic detention by the Justice Department are now used by voluntary agencies.

In addition to buildings, some departments, particularly Social Welfare, make rooms available to voluntary agencies for meetings. For instance, the North Shore Social Services Council meets in the local DSW office. Once again, the extent of this assistance is largely dependent upon district offices and their commitment to voluntary groups.

An official source of assistance for equipment is available from community pre-school advisors of the Department of Education. They have a pool of equipment which local pre-school groups may borrow.

2.2.3 Administration

One of the larger costs for voluntary agencies (particularly small ones) is typing, photocopying and postage.

The Department of Social Welfare has a policy to assist approved organisations which are involved in the co-ordination of social services. In reality this policy is not applied on a consistent basis throughout the country. In Wellington and Greymouth the district offices assist the District Council of Social Services with photocopying and postage, but in Auckland most groups consulted were unaware of this policy. Many used alternative sources of assistance, such as local authorities. Other groups receive administrative assistance from departments when a departmental officer is closely involved with them.

The major barrier to publicising and/or developing departmental policy in this area is the fear of being inundated with requests for assistance.

2.2.4 Volunteer expenses

Social Welfare runs a volunteer scheme and as part of this meets volunteer expenses such as mileage. In some districts the local DSW office does not have its "own" volunteers but supports voluntary agencies by signing their volunteers on and paying their expenses. This is a creative and useful way of assisting agencies, particularly as it can be difficult to meet volunteer expenses through traditional sources of funding.

2.2.5 Training

Voluntary agencies often need short term or on-the-job training for their workers. Department of Social Welfare has two training centres - Tiromoana in Wellington and Taranaki House in Auckland. Members of voluntary agencies have been able to attend these courses without charge, but new charging policies may soon change this situation.

Internal Affairs advisory officers have from time to time organised meetings of workers to discuss issues and develop networks, as well as provide training opportunities. For instance, in Wellington the advisory officers organised a training session on accounting procedures for voluntary agencies. Maori Affairs has organised training courses and hui for workers involved with the departmentally-supported Kohanga Reo programme.

Departments generally have a wealth of training skills and knowledge, of which greater use could be made in meeting the training needs of voluntary groups and workers in their areas.

2.2.6 Secondment of staff

Secondment of staff was a concept which received considerable support from voluntary agencies, particularly the Maori and Pacific Island groups. The advantage to an agency is that it is able to employ an experienced and competent worker without having to meet professional salary costs. Such workers can also bring knowledge and contacts from their department and the wider community. This procedure enables voluntary agencies to carry out pilot programmes with the help of trained, professional workers without making an ongoing commitment to the programme or to the employment of such a worker.

An example of this is a worker seconded from the Justice Department to the Community Law Centre in Wellington, and the Department of Social Welfare has recently agreed to the secondment of Maori and Pacific Island officers to work with their groups in Auckland, Wellington and the East Coast.

2.3 The structure and process of funding

Access to funding by voluntary agencies depends on: how much they know about sources and how the information is obtained; the criteria which are applied and how well the agencies in question can meet them; and decision-making processes in the donor organisations. Some of these structures and processes in relation to discretionary funding are examined in this section.

2.3.1 Information

Until recently, the only place where all sources of government funding to voluntary agencies were set out in one publication was the annual Estimates of Expenditure. In order to clarify this information and make it more accessible, an important part of the project was to draw up a chart of all sources of discretionary funding from government departments and the Lottery Board, and this is now being published in *Towards Community*, Department of Internal Affairs, 1986.

Funds are often administered by different sections of a department. These sections are autonomous and officers tend to know little about the resources of other sections. In addition, there is minimal co-ordination between departments concerning funding information and implementation.

With the exception of Maori Affairs, all departments provide written information for the public on their own discretionary funding - some in pamphlet form and others as typed sheets. Internal Affairs and Social Welfare publish booklets which briefly outline all of their departmental funds. The Auckland district office of Internal Affairs has published a pamphlet setting out the Department's schemes in Samoan. This is the only example found of information printed in a language other than English.

There is no overall mechanism for the distribution of information to the public or to district offices. Some Social Welfare district offices were unaware of funding schemes, particularly newer ones, being operated by their own department. No department regularly carries information on what is available from other departments. Traditional mechanisms for disseminating information to Citizens' Advice Bureaux, local authority community workers, libraries and other community networks are poorly used.

The problem is not lack of information but lack of accessible information. The reading level of funding information and application forms is also an important concern. Translation into other languages does not appear to have been considered in most cases.

2.3.2 Application forms

With the exception of the Department of Social Welfare's Tuhonohono Fund, Women's Affairs Projects Fund and Maori Affairs schemes, all funds require application forms to be completed.

Within each department there is an advisory officer, part of whose work is to assist groups with their applications. The Internal Affairs Department is well known among community groups for this service, but they have little knowledge of assistance available from other departments. The degree of information required and the complexity of application forms varies, but in all cases emphasis is placed on a group's financial situation, formal structure and method of working. Financial budgets and audited accounts are generally required.

Questions such as "Have you applied elsewhere for assistance?" are not uncommon and are of doubtful value. Groups may be unwilling to admit that they have applied elsewhere because of the possible down-grading of their current approach.

There is little doubt that experienced fundraisers know the answers required to strengthen their applications whereas those setting up a new service often do not. This is one of the major disadvantages of centralised decision-making and one of the key issues raised in consultations with the smaller community groups.

The argument against application forms is that they do not encourage those groups which are less formal, or which are from minority cultures, to apply in a way which is appropriate for them. This may involve personal visits to the group by departmental officers and would have obvious advantages for the more marginal groups. The department would also gain the opportunity to assess a group's project within its community context. This, however, can be expensive for a department in both time and money, particularly where decision-making is centralised. Where personal visits cannot be made by the department and oral presentations are not acceptable, the groups which put together impressive written submissions may be favoured.

2.3.3 Criteria for eligibility

The most common requirement for eligibility is legal incorporation. It is important to ask why this is required. The process of incorporation is straightforward, but can be daunting and costly both in time and energy, particularly for smaller community groups. It may also be inappropriate; for example where service agencies are attached to recognised churches. The rationale is that this ensures accountability for taxpayers' money. However, this is questionable as it does not measure the quality of the service being offered. Instead, visits to groups by departmental officers, as mentioned above, may be a more effective means of assessing viability and appropriateness.

The need for ongoing funding is perhaps the major concern of voluntary agencies, particularly in relation to salaries. It is clear that departments are reluctant to use discretionary funds for continuing commitments and will tend to favour "one off" projects where possible. A number of funds now set a limit of three years for funding a particular project.

Recently, some of the Lottery Board distribution committees tightened their criteria. As a result of the increasing demand on their resources, the Welfare Services Distribution Committee will no longer fund those organisations which receive a "substantial" proportion of their funding from government. Groups such as Barnardos, Schizophrenia Fellowship and Community Volunteers have all been told that they cannot assume continuing support for particular projects from the committee. Where then do these groups go for replacement funding? And how is the "substantial" proportion of government funding assessed? Is it assessed against grants or against total funds received, including fees, street appeals, etc.? The problem of managing the transition from innovative to ongoing funding is a recurring one, especially for the increasing number of small community groups.

Most funding sources are single-purpose. This is useful in targeting a particular needed service but can be limiting in terms of changing needs and alternative forms of service, as well as for those groups which offer a variety of services. For instance, childcare funding within both Social Welfare and Education does not cater for after-school programmes. If a Kohanga Reo programme wants to set up a mothers' support group in the evening, they have to go to another source of funding. Community houses which are involved in a variety of different activities, from childcare to support groups to education classes, have to go to several funds and departments for assistance. The present funding system tends to fund parts of, rather than whole, services.

2.3.4   Decision-making

There are currently four models of decision-making operating within government funding systems. These are:

- head office decision-making, with or without recommendations from district offices;
- district office decision-making;
- decisions by a government-appointed committee (e.g. Lottery board or CHIFS);
- decisions by locally-appointed committees (as occurs in CEIS programmes in Auckland and Flaxmere, and which will be the case with the recently announced Community Organisation Grants Scheme).

Most decisions concerning funding are made at head office. This has the advantages of standardising decision-making, treating parts of the country equally, and gaining an overview of current and changing needs. The disadvantages are that requests are not assessed in terms of local needs and priorities; that the quality of the service cannot be ascertained easily through an application form; and that two-way accountability between the department and agency is inhibited.

District office decision-making allows for improved assessment of local priorities and provides the opportunity to build up an ongoing and supportive role with local groups. Two-way accountability is also more readily ensured. The disadvantage is that it is more difficult to get an overview and indication of trends.

Government-appointed committees, such as those associated with CHIFS and the Lottery Board, bring wider and differing perspectives into decision-making. A disadvantage is that members are appointed by government and may not be in touch with current needs and priorities. Except in the case of the Community Development Fund and Youth Services Distribution committee, decision-making through appointed committees remains centralised.

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Decision-making by locally-appointed committees is a relatively new concept in relation to departmental funds, although it has been used for a number of years in allocating funds from the Recreation and Community Development Scheme which is administered through local authorities. The advantage of such a system is that local people make decisions about issues of local concern. Accountability is more easily assessed in terms of the quality of service rather than financial ability. One of the major disadvantages is the increased work-load this puts on local people. The advantages and disadvantages of these decision-making models are presented in more detail later in the report.

2.3.5   Evaluation and accountability

Some funds, particularly those with a limited time-scale of up to three years, require some form of monitoring or evaluation. The major emphasis is placed on keeping adequate financial records, but recently, with some schemes, value seems to have been given to an assessment of the service itself.

For instance, the Disabled Persons Services Fund requires an extensive evaluation, whereas for CHIFS a one-page assessment is considered sufficient, regardless in both cases of the extent of assistance, and carried out by the agencies themselves. The question to be addressed is, "What is the purpose of the evaluation and how should accountability be measured?"

There are a number of concerns about present systems. Firstly, there is no provision for input from the consumers of services except in the case of self-help groups. Secondly the level of evaluation often does not match the degree of assistance given. Thirdly, evaluation is generally seen as occurring at the completion of a funding period rather than as an ongoing process. This practice supports the theory that evaluation is a control mechanism rather than a developmental tool for an agency or group.

There is no indication in any funding criteria as to how the evaluation might or might not be used. If evaluation is to be seen as a developmental tool, procedures need to be introduced which allow for an evaluation process. Criteria for this should be worked out and agreed upon by the department and agency at the beginning of the project and, where possible, consumers of services should be involved.

2.4   Conclusion

The predominant comment from voluntary agencies consulted was that the criteria and method of application reflect the needs of the bureaucracies rather than those of the voluntary sector.   Long and often complicated forms, and requirements such as incorporation, are not appropriate for a number of agencies. Experienced fundraisers, through trial and error, develop a technique of application which puts them at an advantage. Centralised decision-making, which is the main mechanism used by government, tends to reinforce the disadvantaged position of the new and more localised groups.

The current move towards decentralised funding and the development of criteria, such as those for the Tuhonohono programme (Section 3.5), are seen as positive moves by the voluntary sector.

Closer examination of the grants in terms of how they are allocated is revealing. Two-thirds are preallocated, mostly to the larger service delivery agencies on an ongoing

basis. The rationale is that many of these services, such as those for the disabled, have been contracted out by government to the voluntary sector. There are points for and against preallocation of funds, but there was clear disapproval of this mechanism by the smaller groups who felt that there should be a regular evaluation of the quality and appropriateness of the service rather than of the agency itself.

Evaluation and accountability are important issues. However, the tendency to date has been to measure effectiveness in terms of an agency's administrative capabilities rather than the quality of the service to the consumer. Government needs to reassess its role in this area. To date, accountability has been seen to be to Treasury financial requirements. A more appropriate role might be for government to see itself as an agent for the consumer. This would mean government looking at the voluntary sector for clear signs of consumer involvement in services. This involvement could vary from feedback and evaluation to a full and active role in the management of a service. It should, moreover, be considered a prerequisite to government assistance.

A largely ignored area of assistance is that available in a non-financial form. The research revealed a number of sources, most of which are not widely known. In financial terms these sources are of considerable value, particularly to smaller groups. This is an area of support which could be greatly expanded by government and which could make efficient use of existing departmental resources.

If agencies and groups do not have access to information about resources, they do not have access to the resources. Most groups have limited knowledge in this area and generally find out about new and existing sources of funding by chance. The regular publication of simple but comprehensive booklets setting out the various forms of government assistance, distributed widely through traditional and non-traditional community networks, would have a major impact, particularly for the smaller, community-based groups.

Neither voluntary agencies nor government departments appear to have a clear idea of the overall extent and type of government assistance (financial and non-financial) available to the voluntary social services sector. One of the consequences is that policy implementation has become fragmented. There are a number of examples of both gaps and overlaps in government assistance.

It is clear that the demand for assistance is greater than the resources available, and this demand is accentuated when account is taken of the salary costs that have been met by Labour Department schemes.

Government's assistance to the voluntary sector has developed in an unplanned and unco-ordinated manner. In terms of government expenditure the total grants available to this sector are not significant. There is an urgent need for overall examination by government of the form and extent of the assistance it makes available to the voluntary social services.

3. ALTERNATIVE FUNDING SYSTEMS

The discussions that took place during the community workshops and meetings with government department staff raised a wide variety of issues relating to funding allocation procedures. Although the majority of current government funding decisions are made at head office level, there are several alternative mechanisms which have been developed over recent years as well as moves towards the decentralisation of funding which have yet to be implemented. The general emphasis of these new funding systems is towards decentralisation and community involvement. These initiatives tend to be confined to individual departments, although there is some inter-departmental involvement in the Community Education Initiatives Scheme (CEIS), and Community Organisation Grants Scheme (COG).

This section provides a brief description of six of these funds together with the authors' comments and preferences. Funds covered are CEIS, COG, Hamilton Assistance Programme (HAP), Tuhonohono or Neighbourhood Services, Community Health Initiatives Fund (CHIFS) and the Development Levy. Other forms of the local distribution of resources are being developed by the Department of Maori Affairs through Runanga Nui and other tribal networks. Funds that will be distributed in this way include those from the Labour Department's Maori Employment Programme. The Lottery Board Youth Distribution Committee funds and the Department of Internal Affairs Youth Work training fund are also being distributed through regional allocation committees.

This proliferation of new decentralised funding systems shows that government and Lottery Board have taken note of the call for community involvement in funding, but the issue of inter-departmental co-ordination has yet to be seriously addressed.

Unless this issue is resolved and the number of separate schemes is reduced, the current move towards encouraging community participation may simply result in alienating community groups and voluntary workers. Already there are signs of consultation "overload", and the prospect of setting up and servicing a variety of local advisory and funding allocation committees, each relating to a different department, is unlikely to be welcomed.

3.1 Community Organisation Grants (COG)

Following the announcement by the Minister of Labour of the phasing-out of the Voluntary Organisation Training Programme (VOTP), there were numerous expressions of concern by voluntary social service groups throughout the country, because the schemes had been used to initiate and provide a wide range of social services. As a result of a report from an inter-departmental working group, the Minister of Labour announced, in December 1985, the establishment of a new fund, the Community Organisation Grants Scheme (COG). A sum of $20 million will be provided annually, starting in the 1986/87 financial year, to assist organisations providing essential social services.

The funds are to be dispersed in two ways. For some national organisations, most of which have grown to depend heavily on VOTP funding, funds will be provided directly. In the first year these national organisations, including Te Kohanga Reo, the Society for the Intellectually Handicapped, and the Rape Crisis Centres, will receive a total of $11.5 million. The balance of $8.5 million will be distributed at a local level through Community Organisation Grants Allocation Committees.

The Minister's announcement stated that these funds will be available for "essential social services" and that "decisions on what is essential will be made by local

committees and will therefore reflect local community priorities. The government considers that members of local communities are well placed to choose between competing claims and believes that the provision of funds for community decision-making will promote local responses to local needs".

It is proposed that COG will be in operation in October 1986. It is an inter-departmental scheme with the Departments of Maori Affairs, Internal Affairs and Social Welfare being involved. The funds have been transferred from the Labour Department vote and the Department of Social Welfare provides the administration. There are two national co-ordinators who are responsible for a team of eleven field work positions, each covering one of the eleven allocation areas. The first task of the field workers will be to help set up allocation committees, based on local needs and conditions, including geographical and demographic factors. These allocation committees will include representatives of sector groups such as services for the elderly, the Maori and Pacific Island communities and the disabled, nominated by the sectors concerned. Once the allocation committees are in operation, the field workers will be responsible to them and will act in an advisory and supportive role.

Many of the issues raised during the preparation of this report are relevant to the setting up of these local COG committees. The size of area to be covered, whether these coincide with departmental boundaries, the involvement of Maori and Pacific Island groups, how priorities are set, how members are selected, and the relationship with local departmental offices, will all need to be resolved.

One function of the local COG committees, suggested in submissions from community groups, could be to act as forums for needs assessment, the gathering of information and ideas on the provision of services as well as the distribution of funds.

This move towards the local allocation of funds, together with the appointment of local advisory field workers, is in line with the general feelings of voluntary groups revealed during our research. The main danger in the scheme is that the resources made available will not match community needs or expectations. Already, more than half of the total fund has been siphoned off to national organisations. The lack of any formal public consultation over this preallocation and the criteria employed means that it is difficult to assess its fairness. Most of the national organisations concerned are already heavily funded by government and, if these funds are inadequate, any additional funding should come directly from the departments concerned rather than be diverted from a community fund. Examples are Kohanga Reo (Education Department), IHC, Women's Refuges and Rape Crisis Centres (DSW) and PARS (Justice).

There has also been a recent reduction in the funds provided by some Lottery Board Distribution Committees for ongoing funding including salaries. Some agencies had already been told by the Ministers of Social Welfare and Internal Affairs, more than six months before COG was due to allocate its first funds, that they should apply to it for the replacement of their withdrawn Lottery Board or DSW funding. It is difficult to see how the limited resources to be made available through the COG system will be able to cope with this level of demand. However, if the programme is successful in its first year of operation it would provide a useful channel for the decentralisation of other funding which could be allocated directly through the COG system. Some voluntary agencies have suggested that part of Lotto funds should be distributed through COG.

Advantages of COG system

National coverage through regional allocation committees.

- Local community responsibility for the allocation of funds.

- Potential for developing the needs-assessment function into a policy formation and social planning role.

- Encouragement of an inter-departmental approach.

- The regional COG advisory officers could provide regular information on changing government policies and provide a link to other funding and resources.

Disadvantages of COG system

- The limited funds, at least in the first year, may raise community expectations that cannot be met.

- Much will depend on the members of local allocation committees, on the breadth of their experience, and their degree of sympathy with innovative or unorthodox approaches to meeting needs.

- The comprehensive nature of the fund could encourage other funding sources to refer unsuccessful and inappropriate applicants to COG and the fund could be swamped with applications. This could also allow government departments to "shunt" unpopular projects, but ones which could be considered a government responsibility, to the fund.

3.2   Community Education Initiatives Scheme (CEIS)

Following the report to Parliament of the Committee on Gangs in 1981, the Community Education Initiatives Scheme was set up as a pilot programme in three areas - Flaxmere near Hastings, Otara in South Auckland and inner-city Auckland. Annual funding of $150,000 to each project over a three year period was provided through the Education Department. The intention of the programme was to provide resources to these three communities in order to develop constructive alternatives to gang activity. Involvement of the Education Department was considered by government to be crucial to this process as gang membership tends to be made up of young people who have dropped out of the formal education system. Among the needs that were identified to counteract this alienation from learning were:

- to present education to these young people in a useful and relevant form;

- to involve the community directly in responding to the educational, work skills preparation and recreational needs of the children and young people concerned;

- to avoid waste of resources through the greater co-ordination of the various departments and services involved.

The scheme was originally established and funded as a pilot scheme to help young people at risk by means of community-based initiatives. The Cabinet Committee involved at the time hoped that the devolution of responsibility to the communities would enable better co-ordination of resources including government services. Local community committees were set up in each area to identify needs and to allocate funds. These are the Otara Resource Network, the Olaga Society (central Auckland) and the Flaxmere Community Network. Since December 1984, an additional $20,000 has been allocated for travel to

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inter-departmental and community meetings, and for some developmental costs.

During 1985-86, the CEIS programme was evaluated and it is now clear that it will be phased out as a separate programme. The evaluation exercise was carried out by Massey University in conjunction with the CEIS committees and was in itself an innovative exercise in joint evaluation. It is unfortunate that a decision by Cabinet on the phasing out of CEIS appears to have been made independently of this evaluation report. However, both the pilot project and the evaluation will be of value to the COG scheme.

Although the initial concept as approved by Cabinet focussed on a narrow target group - "young people at risk of gang involvement" - each of the three projects has broadened this considerably. The committees pointed out that a community is made up of many interactive parts, so that alienation of one affects the whole, and that they should have a preventive role rather than a "band-aid" one.

Consequently a wide variety of projects have been supported through CEIS. Examples of projects given support in Otara (taken from the Otara Resource Network 1984 report) include:

-       A playcentre at the Pacific Islanders' Presbyterian Church, $5,000 grant.

-       Grants of $20,000 each to two kohanga reo and $5,000 to a third.

-       The Otara Neighbourhood School Scheme, which employs a neighbourhood worker to work in liaison with each participating school and its community and a co-ordinator to develop each school's contract with its worker and to develop the worker's skills and contacts with helping agencies, $10,000 grant.

-       Operation Otara which provide patrols of the Otara town centre from 9 a.m. to 5 p.m. daily, $10,000.

-       Te Hou Ora (Otara Youth for Christ), $10,000.

-       Grants were made to five organisations operating Labour Department programmes, mainly Work Skills Development Programmes (WSDP), including the Pacific Islands Arts and Crafts Centre, Ergon Trust, Whaiora Marae and the Kokiri Te Rahuitanga Ki Otara. These grants varied between $10,000 and $38,000.

In addition to these grants, $11,000 was allocated for research and co-ordination while $80,000 was provided as loans.

Projects funded in the three programmes have varied depending on local needs. The Otara allocations fit into a broad interpretation of the scheme's original intention, being used in the areas of pre-school, school/community liaison, and support for youth work and employment programmes. The heavy emphasis on providing additional resources to the employment programmes indicates the way in which the CEIS resources had become a relatively minor input compared to Labour Department funding. How current changes to these schemes will affect Otara, and the other CEIS areas, is causing considerable concern.

The Flaxmere CEIS group has used some of its funds in a particularly innovative way. There was concern over the relevance of primary school education in the area, especially following the success of kohanga reo. As a result, CEIS carried out a household survey of residents' views on the form of school and education desired. The interviewers were drawn from the local community and were paid on the basis of the

number of interviews carried out. This move towards "needs assessment" is often missing in local communities because of the difficulty of getting funds for this purpose. In fact the CEIS programmes could be viewed overall as a form of needs assessment. What is needed now is a process for transferring programmes that are meeting departmental criteria over to some form of ongoing funding.

Although one intention of CEIS was to encourage inter-departmental co-operation, it is difficult to see much evidence of this. The provision of the funds from the Education Department effectively labelled the programmes "education". As a result, advisory staff from other departments have not been encouraged to move successful CEIS projects over to other funding programmes; the youth work programmes, for example, could have been transferred to the Internal Affairs Detached Youth Worker scheme or Department of Social Welfare Adolescent Living Skills funding.

CEIS has provided extra funds for designated areas but it is difficult to assess the degree to which they have substituted for potential funds from other departments. Projects in the pre-school, youth work and employment areas could all have been funded from alternative sources. There is only a limited amount of voluntary energy within any community and the unpaid time that has been put into making the operation of the CEIS committees a success might have been more profitably spent on pursuing other funding.

Advantages of CEIS

- Resources were provided to targeted areas - although the basis for choosing these three particular communities is not clear.

- Decisions on the allocation of funds are made by the local community.

- The process of selecting a local committee, assessing applications and allocating funds has helped develop community awareness and self-confidence.

- The flexibility of funding criteria means that communities have been able to use resources for needs assessment when required.

- There has been some inter-departmental involvement although this seems to be limited in practice.

Disadvantages of CEIS

- As a pilot scheme, funds are only available within specified areas. This can cause boundary problems with neighbouring areas which may share many of the same problems and concerns.

- The emphasis on local decision-making has placed a heavy load on communities with limited resources. Many of the same people are involved in several local organisations. Additional government support services seem necessary to ensure full advantage of this community involvement.

- The initial purpose of the scheme suggests that the funds are meant to be used within a broad education framework, necessitating the "twisting" of some projects to fit within this.

3.3 Development Levy

Concern over the possible negative effects of major development projects resulted in the introduction in 1981 of a development levy. Amendments to the Local Government Act required developers to make payments to the appropriate united or regional councils to help meet costs resulting from their projects. The levy amounts to up to 0.5% of the capital cost of any project costing $50 million or more. The levy on the first $50 million must be provided as a reserves contribution but monies in excess of this can be used for a wide variety of purposes in order to "offset the impact a large scale industrial, commercial or administrative development may have on a region". This includes "recreation and community development in response to the development".

Funds are allocated by the united or regional council and there is no directive for community participation additional to the elected representatives on the allocation committee. In some areas action has been taken to identify social needs and develop plans to meet them. The Taranaki Community Monitoring Project Social Needs Committee is an example (see p. 42). Even so, there have been problems in getting resources for social services. It has been difficult to show that the demand for services such as a community house, women's refuge or childcare service relates to the project development. The amount of information required in the application forms can make this a daunting procedure for a small community group.

The Development Levy provisions allow appeals under the Town Planning procedures for groups that are unsuccessful in applying for funds. No information is available on the effectiveness of this but the principle could be considered by other funding systems.

A review by the Social Advisory Council of the legislation's first four years of operation, *Development Levy: directions for change*, makes a number of recommendations to enable these funds to be used more effectively in the community. These include:

- That regional authorities should be required to undertake social impact assessment upon approval of a development plan, and to allocate Development Levy monies for this.

- That the provision that the levy on the first $50 million be provided for reserves be removed.

- That an instalment of the expected levy be paid upon approval of a development plan to enable the employment of community development workers.

- That guidelines be set up to facilitate public participation in decisions on the allocation of the levy.

Although the Development Levy legislation was introduced to alleviate the social effects of major developments, and as such is only in operation in a few specific areas of the country, it has the potential to provide significant resources to social services in the areas affected. A similar policy is being introduced by State Coal Mines. Under the Coal Mines Act 1979 there is provision for the payment of Amenity Grants. A discussion paper on the new policy published in March 1986 suggested an interpretation of "amenity" to include social activities or community surveys as well as physical facilities. This would mean that, "measures which ameliorate any increased community tensions or stress or contribute to community mental health or stability, for example counselling services, women's refuge centres, health self-help" could be funded. The size of the levy is similar to that of the Development Levy, 0.5% of capital costs, without the compulsory reserves contribution.

The first funds were expected to be distributed in August 1986. In the Waikato this could amount to approximately $250,000 annually. As with the Development Levy, funds would be allocated through the united or regional councils. The State Coal Mines discussion paper suggests that those councils should act as "post boxes", receiving applications and passing them on to a regional advisory committee. This committee will consider the applications, allocate priorities and make recommendations to the Minister of Energy who will make the final decisions.

Advantages of the Development Levy

- Funds are targeted where social disturbance is expected.

- Involvement of the united and regional councils can help co-ordinate services and encourage a "social planning" approach.

- The funds are clearly additional to any other resources.

- There is an appeal provision for unsuccessful applicants.

Disadvantages of the Development Levy

- Reliance on local authorities does not ensure participation by the community in the allocation of development levies. Criticism of existing local authority involvement in funding through the Recreation and Community Development Fund frequently refers to the narrow representation on most local bodies, i.e. predominantly white, middle-class, male businessmen.

- Although a regional advisory committee structure is included in the State Coal Mines grants, the final decision is not made locally but by the Minister of Energy.

- Targeting is confined to areas experiencing major developments which means resources will not necessarily go to areas of greatest social need. Where long-established industries such as forestry and mining are closing down, there could be greater needs but there is no current means of providing additional resources for social services to these areas.

- A mechanism which was originally envisaged as coping with "amenity" and "development impacts" is being expected to provide resources for social and community services. Thus, there is an inevitable conflict between these differing demands.

3.4   Hamilton Assistance Programme

Hamilton City Council has established a programme to distribute the Internal Affairs Recreation and Community Development Fund plus some additional City Council money. Eventually, voluntary groups will be able to apply to the one place for funds, rate rebates, etc. The purpose of the programme is "to encourage and support the efforts of groups responding to community needs through self-help, co-operation and voluntary participation". Grants are available to groups providing "a recreational or community service. This includes groups catering for arts, culture and sports as well as those whose function is to provide support services to groups with identified needs."

Key points are

- Decisions are made jointly by the Council and a community allocation committee, with applications assessed by Council officers.

- This is a move towards one joint fund for all recreation and community grants in Hamilton.

- Applicants are usually visited by a Council officer on their first application. This would be either a recreation or a community worker, depending on the type of project.

- Details of applications are kept on computer to enable easy comparison with previous years' allocations and to avoid unnecessary revisiting.

- Since 1986, oral applications have been accepted and written down by Council staff.

- There is a proposal for sector sub-committees to be set up in the future. These could cover areas such as pre-school services, recreation programmes, youth work, etc.

- The programme is regarded as a planning exercise both for the community organisations and for the Council, as well as a funding mechanism.

- Assistance is normally given in the form of a subsidy to supplement money raised, but straight grants and loans will also be considered.

- One-third of each year's allocation is used as salary subsidies, often provided for a three year period.

- Workshops for voluntary groups, explaining the programme's aims and procedures, are held prior to the closing date for applications.

The programme appears to have worked well since it was set up in 1983. However, there are some aspects that would need reconsideration if the scheme were to be duplicated elsewhere. With the Recreation and Community Development Fund as the basic resource, the programme has to include a very wide range of services, including sport, recreation, arts, cultural, community and social services. It is unclear to what degree the competing demands from these groups have been successfully met. Whether a city council, furthermore, is an appropriate agency to handle such a programme, including the promotion of the scheme, the initial contact with and assessment of applicants, and the appointment of an allocation committee, will depend on its commitment to the community development process. Where a council has an established Community Services Section, as with Hamilton City Council, this commitment is more likely to be present.

A long-term aim of the programme is to use the planning component more fully and, to this end, two consultations have already taken place, one on pre-school needs and the other on the needs of the disabled. Over a period of several years, it is intended to take virtually every category of community concern and work through a plan in order to provide money on the basis of greatest need rather than simply the ability to make a persuasive application.

An advantage of the programme for application elsewhere is that it is based on a funding system (the local Recreation and Community Development Fund) that is already in

operation throughout New Zealand. A drawback is the general lack of experience in, or commitment to, the social service field on the part of many local authorities, and the absence of any clear responsibility for this area.

The success of any funding system based on local authorities depends largely on the employment of community work advisory staff to ensure good two-way communication with voluntary groups.

If government funds are to be channelled through this system in other places it is important that the relative weighting given to cultural and social services be clarified. This could be done through the establishment of sector groups or sub-committees. In this case, sports and cultural groups would need their own funding systems. With the arts this already exists in most areas through Community Arts Councils. There are proposals currently before the Minister of Sport and Recreation for a change of funding systems in that area. It would also be essential, as with all community-based allocation systems, to ensure wide representation, from users as well as providers of services, on the allocation committees.

Advantages of HAP

- Local authority involvement allows the use of their community and recreation staff and administrative resources.

- Community involvement in the allocation committee.

- The community consultations provide an innovative social planning and advisory function.

- The computerised recording of applications could provide future input into the social planning process and a clear picture of areas of concern.

- The acceptance of oral applications may encourage Maori community groups and informal groups to apply for funds.

Disadvantages of HAP

- Limited funds available compared to the potential demand.

- The comprehensive nature of the programme (including recreation, arts and social services) means that there could be great difficulties in determining priorities.

- Operation of the programme by the City Council limits the potential for increasing government inter-departmental co-operation.

- If the concept is to be established elsewhere, this will depend on the local authority/community relationship and the degree to which a particular council accepts responsibility for social planning and ensuring the delivery of social services to its area.

3.5   Tuhonohono/Neighbourhood Services Programme

The Neighbourhood Services programme was announced by the Minister of Social Welfare in November 1984. A sum of $200,000 was allocated for the first year, with proposed increases to $400,000 in 1985/86 and $500,000 in 1986/87. The aim of the fund was stated by the Minister to be:

> "...to support local community programmes for the well-being of families. Grants will be made to local groups which develop and run such programmes... The concept of neighbourhood, of being part of a caring community, is again being recognised as an asset and a source of strength to families under stress."

Applications are made either through the district offices or directly to head office. Decisions are made at head office level with advice from a social work adviser with responsibility for overseeing and promoting the programme. No written criteria were available at the outset and, following the Minister's announcement of the programme, interested voluntary groups either contacted their local district offices for information or wrote directly to the head office.

Twenty-five percent of the first year's funds, $50,000, was granted to the Waiora project in South Auckland, while the rest was distributed to a variety of groups, most of which had made a direct approach to DSW head office without waiting for detailed information on the programme.

The advisory officer was appointed during 1985 and one of her tasks was to draw up the programme's criteria. At this time, the programme was given a Maori perspective with the appointment of a Maori advisory officer. It was renamed the Neighbourhood Family Support Services Programme: Kaupapa Tuhonohono and the application process was simplified. There is no formal application form. Groups are invited to write in to the Department setting out their purpose and, in some cases, a departmental officer visits to discuss the proposal further.

During this second year eighty applications were received and funds were distributed to 26 groups; 14 (or 54%) were predominantly Maori-orientated. There was also one successful application from a Samoan project. It is impossible to make a precise breakdown of the applications or of the groups receiving funds according to whether they were Maori, Pakeha or Pacific Island. Many of the applications, especially in multi-cultural urban areas like South Auckland, cater for a cross-section of ethnic groups. However, the applications can be divided into those providing services *predominantly* for Maori, Pacific Island or general community groups.

	Applications		Allocations	
	No.	%	No.	%
Maori groups:	34	42.5	14	54
Pacific Island groups:	4	5	1	4
General community groups:	42	52.5	11	42
TOTAL:	80	100	26	100

The applications and allocation of funds show that the Maori emphasis in the Tuhonohono programme, including the name, has been successful in providing resources to this community. At the same time, this Maori emphasis has resulted in few applications from

Pacific Island groups, although some are involved in multi-cultural organisations like the Otara Neighbourhood Schools Programme. It may be significant that the successful Samoan programme was submitted under the umbrella of the Auckland Pacific Island Education Resource Centre (PIERC), and was supported by a group of Pacific Island social and community workers.

The problem of making such resources available to small neighbourhood groups has not been overcome by the Tuhonohono programme, as there is still a departmental expectation that groups receiving funding are supported by a "parent body" such as PIERC or a Church Social Service agency. In some cases, the district office of the Department of Social Welfare has provided this initial support to a new group; in others, the application has gone directly to the head office with no district office input.

Although there has been little public promotion of the fund, in its second year of operation, 1985/86, Tuhonohono received applications for more than $1 million and had a budget of $400,000.

Within the community there has been considerable confusion between Neighbourhood Services and Family Services, both Department of Social Welfare programmes. Recently-printed criteria for Tuhonohono clearly specify that the fund is aimed at "neighbourhood and whanau based services" rather than those provided by local branches of voluntary organisations. The DSW Family Services and Family Support programmes, on the other hand, are concerned with voluntary agency social work services.

There are, however, some areas of overlap. An example is in the Department's support for Pacific Island groups. The Auckland Cook Island community received a grant from Family Services for the employment of a community worker while the Samoan community received a similar grant from the Tuhonohono programme. There are some differences between the two projects, but the similarities are considerable and it would be difficult for a voluntary agency/ community group to know which was the more appropriate fund to apply to without departmental advice. This may well be based on which fund still has funds available. Where possible, unsuccessful applications to Tuhonohono have been referred to other funds or departments and this has, in some cases, resulted in alternative resources being obtained without the group concerned having to make a fresh application.

The Department of Social Welfare guidelines for Tuhonohono state that "some priority will be given to projects which require once-only grants or need only limited ongoing financial support". As with many other funds, it is difficult to see how this intention can be adhered to in practice. Among the programmes funded in its first two years of operation, the New Mothers' Support Group and the Samoan community programme will clearly require ongoing funding and this is probably true of many other schemes. If the programme is to retain the ability to fund new programmes in future years, it is crucial that a procedure be developed to enable the transition of effective and relevant programmes to some form of ongoing funding.

3.6   Community Health Initiatives Funding Scheme (CHIFS)

The Health Department announced its new community health funding programme, CHIFS, at around the same time as the Neighbourhood Services Programme was introduced by the Department of Social Welfare (causing further confusion on the part of voluntary groups). Both programmes had their funding allocated in August 1984. CHIFS, however, did not allocate any funds until the 1985/86 financial year.

CHIFS shares some of its philosophy with the Tuhonohono/Neighbourhood Services Programme. It too is aimed at community-based groups rather than at local services provided by national organisations. The emphasis is on self-help groups and funds are not available for groups providing a service *for others*. This aspect of the criteria is more restrictive than that of the Neighbourhood Services Programme.

As a Health Department fund the scheme has a clear health emphasis, but in terms of *community* health the gap between "health" and "welfare" becomes a very narrow one which is invisible to many community groups. Some groups, such as the New Mothers' Support Groups, have received funding from both programmes for different parts of their services. In general, CHIFS grants have been smaller than those from Tuhonohono; there were 27 grants of between $50 and $250 in 1985/86. There is also a strong emphasis in CHIFS on innovative and short-term projects, rather than ongoing programmes.

Applications for CHIFS funds are made through Health Department district offices. For small amounts, up to $250, decisions are made locally, while allocations of larger sums are made by the CHIFS Programme Committee which has community representation including a member of the Maori Women's Welfare League. There is also an advisory officer with responsibility for the programme at head office and, during 1985, a half-time Maori advisory officer.

A breakdown of applications and allocations similar to that for the Tuhonohono programme (for the second six months of 1985 for large grants, and for the whole year for small grants) shows that there were no applications from Pacific Island groups and that applications from Maori groups were less than half those received by the Tuhonohono programme. Of the Maori applications, three were from branches of the Maori Women's Welfare League. Several of the general applications were from branches of organisations such as the New Mothers' Support Group (six applications) and the Women's Division of Federated Farmers (two applications). This shows the importance of distributing information on funds through existing networks. In this six-month period, applications totalled $402,657 while allocation of funds were $71,877. Sixty out of ninety-five applicants (63%) were funded, but only 18% of the total amount requested could be supplied. This is because of the large number of small grants funded and also because the unsuccessful applicants had often applied for inappropriate sums (several were for $10,000 to $20,000). During the full 1985/86 year, applications totalled $850,000.

	Applications		Allocations	
	No.	%	No.	%
Maori groups:	16	17	12	20
Pacific Island groups:	0	0	0	0
General community groups:	79	83	48	80
TOTAL:	95	100	60	100

As with the Tuhonohono programme, there is difficulty in making contact with local, unattached community groups, and a corresponding emphasis on sponsoring organisations. The lack of applications from Pacific Island groups highlights the importance of distributing information through appropriate networks.

- The importance of having clearly-defined criteria before a new programme is publicly announced. By delaying its start, CHIFS avoided the problems of allocating funds before clear criteria were available and of confusing potential applicants.

- The usefulness of introducing a variety of specific, centrally-allocated funds rather than a smaller number of general funds allocated locally. There is some tension between the demand from voluntary groups for funds with broad criteria that can be interpreted to suit local needs and the tendency for centrally-defined funds to reflect narrow departmental concerns.

- The lack of a clear definition of terms - community, neighbourhood, health and welfare. These may have importance and meaning to the departments concerned in identifying target groups and justifying allocations, but overlap in the perceptions of voluntary groups which often provide multi-purpose services. Gaining funding can then become a matter of skill in writing applications and fitting objectives to funding criteria.

- The name change of the Tuhonohono scheme and the employment of a Maori advisory officer gave practical support to the Department of Social Welfare's intention to provide a Maori perspective to the scheme. The success of these moves is indicated by the applications and the allocation of funds. The limited response from Pacific Island groups may indicate that they see this as a specifically bi-cultural Maori-Pakeha fund. The lack of any Pacific Island applications to CHIFS in the period covered shows that specific action needs to be taken to get information to Pacific Island networks.

- The access provided to the programmes for Maori groups raises the issue of whether there is a need for culturally-specific funding programmes, delivered through departments such as Maori and Pacific Island Affairs, or whether the emphasis should be on making all existing programmes more accessible. The employment of appropriate head office staff has undoubtedly been a major factor in the increased provision of funds to Maori groups.

- The publicity dilemma is highlighted by the large amount of money applied for compared to the available resources in schemes which have not been widely promoted. If a concerted effort is made to ensure that all voluntary groups know of the funds, the departments could simply be raising expectations that cannot be met. The number of applications to CHIFS for large and inappropriate amounts shows the need to make the level of potential funding clear.

- The difficulty of making contact with, and providing resources to, small, local, neighbourhood and/or whanau based groups is still evident, even with programmes that are aimed precisely at these groups. Currently there is some involvement of district offices in overcoming this. The decentralisation of the programmes could make this contact work more effective.

3.7   Conclusion

During this project the meetings with community groups and government department staff resulted in a large degree of agreement over some desired changes to current funding systems. Some of the advantages and disadvantages of alternative systems have been

listed. This section comments on the alternatives and the preferences of small community groups. It identifies elements that could be usefully integrated into an effective decentralised funding system.

Attributes of the preferred funding approach are:

- A decentralised system based on regional boundaries that make sense to the communities concerned, but providing national coverage.

- A set of allocation committees made up of community representatives, with departmental staff involved in an advisory role only.

- Funding available within clearly identified social service boundaries to prevent confusion or conflict with sport, recreation and arts schemes.

- Maximum flexibility to fund projects with relevance to the local community.

- Funding allocation based on population but with a weighting for factors such as rural isolation and the presence of groups with identified needs.

- Provision for policy discussion and needs assessment by the allocation committee, with the eventual development of a local social planning process in association with local authorities and ad hoc authorities.

- A linkage with local departmental staff in order to encourage inter-departmental co-operation. This could be provided through the involvement of departmental staff in an advisory role to the allocation committees and to community groups in general.

- Provision for the referral of projects to other funds where appropriate, e.g. the Maori Employment Programme, Youth Work Training Fund, etc. The permission of applicants to this procedure would need to be obtained in the initial application.

- Adequate overall funding linked to social needs rather than to unrelated elements such as the level of public gambling in the case of Lottery Board or Lotto grants.

- The attachment of an advisory officer to each regional allocation committee, funded by government, but responsible to the committee.

- The development of a multi-cultural dimension through the conscious involvement of the Maori and Pacific Island communities in allocation committees.

One provision in the Development Levy procedures that could be considered by other funding programmes is the right of appeal. Although the Town Planning appeal procedures are rather cumbersome and daunting for this purpose, the opportunity to find out why a group has been unsuccessful in its application and to appeal against this decision would be welcomed by most voluntary groups. If the allocation committee is locally based, however, the question of who an appeal should be made to arises. Perhaps it would be useful to have a separate appeal committee, including departmental as well as community representatives, which could clarify the reasons for refusal of an application and, if appropriate, refer the application back to the allocation committee with a request that it be reconsidered.

The potential for social planning provided by the Hamilton Assistance Programme had a great deal of support. Whether COG will make provision for this is unclear at present, but a network of regional allocation committees, providing they have the services of a paid advisory officer, could provide a useful basis.

Locally-based social planning was discussed in the 1978 report from the New Zealand Council of Social Services, *Sharing Social Responsibility*. This suggested that further work should be carried out on the concept of "community development plans". Local authorities, government departments and district councils of social services were expected to be involved in this planning process. Although an ad hoc working party convened by the Auckland Regional Authority published a report, *Social Planning - a Community Development Approach*, little practical action has been taken. One reason for this is the lack of agreement over whose responsibility this should be. Locally-based allocation committees, whose role includes that of feeding information and ideas into the policy-making process, could act as a nucleus for social planning initiatives.

4.   ISSUES

4.1   Summary of conclusions from workshops

The issues covered in the following section arose from and were clarified by the workshops involving voluntary groups and departmental officers. The most striking feature of the discussions was the overall agreement that was evident. Although each group emphasised different elements in the government/voluntary agency relationship according to their own situation and responsibilities, there was no major disagreement about the basic issues.

With the community people, more time was spent in discussing practical concerns about how to obtain information, problems with specific funds (especially changes to Labour Department schemes) and where and how to apply for resources. District office staff emphasised the need for better communication and co-ordination between districts and head office, especially in terms of up-to-date information and increased contact between departments. Many also saw their current roles as being potentially in conflict. The ideal was seen as being advisory and supportive to voluntary agencies and services. In reality they are required to ensure the financial accountability of groups and act in a "policing" role. Head office staff were concerned about the lack of any comprehensive overview of social policy at present, and stressed the need for some mechanism to facilitate this. Where this should be based was unclear, but a general feeling was that it should not be attached to any existing government service delivery department. The rationalisation of departmental boundaries and the importance of improved inter-departmental co-operation and information exchange were also stressed.

Although there was a remarkably high level of agreement about the issues that require attention, there was less agreement or clarity on ways of overcoming the problems. One of the most interesting points related to the role of government officials. Voluntary groups were predictably critical of existing departmental functions and suggested that a more community-orientated and supportive role was required. What was surprising was the degree to which departmental staff agreed with this criticism. Within the departments of Maori Affairs, Social Welfare and Internal Affairs, there are, in fact, indications of change. The REAP (Rural Education Assistance Programme) community education workers had also moved very strongly in this direction. None the less, there was a feeling of uncertainty as to whether involvement in the local community was approved by head office, and a fear of raising community expectations too high. The lack of funds and other resources and the statutory responsibility for assessing programmes and policing standards has limited the move towards a supportive role.

All groups agreed that there was a general lack of consultation and co-operation between departments, as well as a reluctance to take action to remedy this. However, we did find examples of useful exchange of information. In New Plymouth, for example, the various departmental officers meet regularly as part of the Taranaki Community Monitoring Project Social Needs Committee. This group was formed in 1981 to identify and meet needs arising from the social impact of the natural gas developments and has continued to provide a useful forum for officers from the Departments of Social Welfare, Health, Maori Affairs, and Labour, the Taranaki Education Board, Housing Corporation, Ministry of Works and Development, Taranaki United Council and the North Taranaki Council for Social Services. A report from this group on its activities states that, "... the committee has acted as advocate for various community concerns and has built up a successful liaison with the development companies and central government... Of particular importance to this process is the link with the North Taranaki Council for Social Services as it represents over 80 local community organisations, and the

liaison that occurs between government departments under the auspices of the committee." Although there have been special circumstances in North Taranaki surrounding the development of the petro-chemical industry, this committee gives an indication of how local departmental offices can work together if the incentive is provided. Unfortunately, similar examples of useful co-operation are unlikely to develop unless an outside agency initiates them. Some inter-departmental co-operation has also resulted from the CEIS programmes and Te Koputu Taonga inter-departmental community project in Otara.

Comments about the importance of an overview of social service needs and delivery came up at all levels. This project has looked specifically at the provision of government and Lottery Board resources to the voluntary social service sector, but the discussions often came around to asking why these resources should be provided at all. In Auckland and New Plymouth, considerable time was spent in discussing where social policy in New Zealand is heading. Most voluntary groups like to feel that what they are involved in is worthwhile and part of a comprehensive scheme for service provision. It is often difficult to be sure of this when the rationale or direction of government social policy is not explicit.

4.2   The role of intermediaries

There tend to be three agents engaged in the process of determining funding for voluntary social services - the funding bodies, the recipients themselves and those who may be called the "intermediaries". These last are community workers and community educators who act as channels for information from government to voluntary agencies and who are usually involved in interpreting criteria, assisting new groups to get established, facilitating co-ordination between groups and providing feedback both to their own employers and to government about local needs.

The importance of these intermediaries cannot be overestimated. It is clear that where such staff are employed there is better access to information and a subsequent flow of resources to the voluntary sector. Inner-city and lower socio-economic areas are most likely to be served by city council community workers. In rural areas this intermediary role is often played by community educators employed through REAP. Information and resources tend to move towards those groups with whom these workers are in contact and with whom they have some empathy. This means that, in an urban area, members of the local Maori and Pacific Island communities may still miss out (see 4.6).

Although most community workers in New Zealand are employed by city, regional or rural councils, some are employed by voluntary agencies, such as the Wellington Inner City Ministry, the Auckland Methodist Social Services and the Young Women's Christian Association. The information-sharing and facilitating role is similar for all, although the resources available to the workers may vary.

Discussions were held with city council community workers in Auckland, Manukau, Wellington and Christchurch. REAP staff were included in discussions in Westport and Hokitika. Other community resource-people contacted were at the Nelson Polytechnic Community Education Service and the Auckland Pacific Island Education Resource Centre (PIERC). The following points were raised on the role of intermediaries in relation to the provision of funds to voluntary groups.

The community worker's role

This is seen as threefold:

i)   information gatherers and providers,
ii)   advisors/supporters to community groups,
iii)   advisors to government departments on community needs, funding issues, etc.

Access to information

Although most community groups stated that city council community workers were an important source of information about funding, these workers themselves had problems in finding out about programmes. They usually had to make the first approach to departments, which made little attempt to keep workers informed of new developments and changes to criteria. The advantage the intermediaries have is that this contact work can be part of their paid work.

Playing the system

A dilemma for the intermediaries is whether they should "play the system" or try to change it. They are able to help community groups find out about funding and other resources, to help them present an acceptable application and to act as sponsors or referees. This facilitative power is highly regarded by community groups and the advice of community workers is usually respected by the funding agencies. Working to change the system to one in which community groups have more direct access to information and resources threatens this relationship and could undermine the intermediary role.

The relationship between central and local government

There is no clearly defined relationship between central government and local authorities in the social service or community development area. Community workers felt strongly that the present relationship needs to be clarified and its implications developed. This would include consulting local authority workers on the development of new policy. The comment was made that policy is frequently developed by central government with no local authority input, and then local authorities are expected to play a major part in its implementation. Labour Department programmes, the Recreation and Community Development Fund and Detached Youth Workers are examples of this process.

4.3   The transition from innovative to ongoing funding

The central issue raised in discussions with voluntary agencies was the need for assured, ongoing funding. This request for security was balanced by a strong demand from many community workers and advisory officers for increased availability of funds for new and innovative projects, and criticism of the large amounts of money that are "locked in" to established organisations. Whether and how these conflicting requests can be resolved is critical to the whole funding process.

A large number of new and innovative services, responding to local needs, have been established throughout New Zealand, using money from telethons, Labour Department employment schemes and the Lottery Board distribution committees. Some schemes are able to move to ongoing funding from other sources. One example is Women's Refuge: as the need for refuges was confirmed, and they became organised on a national basis, the Department of Social Welfare accepted its responsibility in this area and is now providing departmental funds.

The Lottery Board has made grants on both an innovative and an ongoing basis over the years. However, fears that it was becoming too heavily committed to long-term funding has led to a change in policy, as noted previously. From now on, Lottery Board policy is to direct funds to new and innovative programmes and not to guarantee long-term support. This arises from competition for funds rather than any judgment on the value of services.

These trends have led to pressure on departmental funds and calls for specific funding for particular schemes. There is no clearly defined means whereby the transition from short-term to ongoing funding should take place. Nor do the smaller and newer community groups understand the processes which are available.

What are the options for agencies which have been established using short-term funding sources, assuming their continuation is justified?

1. *Amalgamate with another, probably larger, organisation*

   The new service may well, however, have arisen because of dissatisfaction with existing agencies. To become part of a national organisation may also run counter to the original intention of providing a localised service.

2. *Apply for existing departmental funds*

   These tend to be fully allocated each year, although there has been real growth in such sources in response to increased demand, e.g. the Department of Social Welfare's Family Services and Tuhonohono schemes.

3. *Lobby for the establishment of an earmarked departmental allocation*

   This is the traditional way of gaining long-term departmental resources, but requires active lobbying of both the appropriate department and the politicians. This is a practical suggestion where an agency is part of an organised lobbying group, such as the New Zealand Association of Child Care Centres or the Federation of Voluntary Welfare Organisations, or it has a well organised national structure, such as the IHC or the national Collective of Women's Refuges. But with the smaller, localised groups that rely on short-term, innovative funding, this is a daunting prospect, especially as effective lobbying requires frequent visits to Wellington.

Lottery Board distribution committees have co-operated with departments on occasion in order to introduce jointly funded programmes. An example is the Family Support Services programme in which voluntary agencies were requested to apply for the service delivery contract. In Christchurch the successful "tender" went to Barnados, and it was agreed that the scheme should be funded 40% by the Department of Social Welfare, 40% by the Lottery Board Welfare Distribution Committee and 20% from Barnados' own funds. In this case, the programme was initiated by a government department, presumably to meet needs which had been identified in the local community. The question of responsibility for ongoing funding still remains, given the new stance of the Lottery Board.

Criticism of the Lottery Board from some organisations that have not had their funding renewed would perhaps be more rightly directed at government. In spite of its supposed independence, the Lottery Board is subject to the decisions of government departments to the degree that they decide *not* to fund certain services and projects and instead either refer them on to one of the Lottery Board Distribution Committees or expect to negotiate joint funding.

What is needed is a transitional process in which a joint departmental/community review indicates whether a service is meeting a need and should be continued. If the review decides that the programme is not a priority, it would then be up to the service group to decide whether to look to other funding sources, such as charitable trusts, private business, or user fees, or to close down the programme. If it is agreed that the service is a priority in departmental and community terms, then it should be transferred to ongoing government funding. In most cases this would mean using an existing fund, while programmes with a national, or potentially national, coverage might require a new, specific funding programme.

Two difficulties still remain:

1.   What is the appropriate and acceptable form of evaluation? There is a clear demand for a community/agency/departmental partnership in any evaluation.

2.   Given limitations on government expenditure in the social service area, there would need to be similar evaluations of established organisations with long-term funding in order to free up some funds for this process.

4.4   Centralised funding of national organisations

The majority of government funding to the voluntary social services sector is allocated centrally to national organisations. Even so, staff from branches of national organisations who attended the workshops shared many of the same concerns as the representatives from local agencies. This was complicated by their relationships with national headquarters, which were usually in Wellington. Frequently, an annual budget would have to be submitted to the national office and approval requested before additional staff could be employed, making it difficult to respond to changing needs during the course of the year. Funding applications were usually handled from the national office. The Labour Department had been used by some regional branches to employ additional staff without the need for national office approval and this flexibility was favourably commented on.

The advantages of having centrally-funded national organisations are balanced by disadvantages which appear to be inherent in any centralised system.

Advantages:

-       National organisations are able to provide a comprehensive coverage of a particular client-group throughout the country, although in practice this is limited by the same constraints that affect government departments. Isolated and rural areas are often poorly provided for.

-       National organisations give some guarantee that services will be provided to a set standard which can be negotiated with the funding department.

-       The size of a national organisation can ensure that acceptable and standardised administrative practices are implemented, particularly as regards financial administration.

-       The fact that many national voluntary social service organisations in New Zealand are themselves branches of international agencies, or are linked to international federations, means that there is a constant interchange of ideas

in line with overseas research and experience.

- The size and stability of national organisations mean that staff have a reasonable degree of security and a career path, albeit limited.

- If the intention of government is to contract out a particular service, as has happened with the education services provided by the Foundation for the Blind, then doing this through a national body can provide effective service.

Disadvantages:

- National coverage and set standards can result in a lack of attention to regional and local needs. There is a noticeable clustering of services in inner-city areas, with considerable overlap between agencies in some cases, while rural areas may be under-serviced.

- The size of national agencies can mean that administration and staff relations are more similar to government bureaucracies than to a non-hierarchical alternative.

- The dependence on government funding, together with commitment to the ongoing employment of large numbers of staff (administrative and service delivery), means that innovation and flexibility can be reduced and outmoded policies and programmes may be retained.

- The nature of voluntary organisations is such that there is no automatic right of access to the decision-making body by the consumer or community member. In comparison to a government department, it is often difficult to identify the responsible person or channel of communication. There is no equivalent of the local MP to appeal to in cases of dissatisfaction.

Weighing up the advantages and disadvantages of the centrally funded, national voluntary organisation, it appears that in many ways they have more in common with government departments than with local, community-based groups. Some of the advantages listed can be provided through a federation or a national co-ordinating body rather than by a centralised organisation. Many of the small, local groups have stated their appreciation of national co-ordinating bodies which keep them informed of new funding schemes and developments in their area of concern.

If a conscious decision is made to deliver certain services through the centralised, national voluntary sector, it is important that the following issues are addressed.

- Services must be evaluated in relation to needs and in discussion with other local agencies, to ensure that they are relevant to local needs and conditions.

- Several government departments, including Maori Affairs and Internal Affairs, are currently devolving services to local communities. This should be matched by a similar move on the part of national voluntary agencies if they too are to move closer to the communities they are serving.

One of the suggested advantages of the voluntary sector is its cost saving ability. But if services are provided on a national basis, especially if they are under contract to government, wages and staff conditions should be comparable with those in the public sector.

4.5   Rural isolation

The meetings and workshops held in provincial and rural areas including Westport, Greymouth, Hokitika, Whataroa, Whakatane, Ruatoki and New Plymouth raised several important issues about the effect of rural isolation on the local community and on voluntary agencies.

Current funding policy was considered to disadvantage these areas. The feeling was expressed several times that government funding and social service policy in general was created for the Auckland urban area, with little consideration for regional differences. An example is the extra weighting given to urban areas with large Maori and Pacific populations, high numbers of children and housing problems. While not disputing the importance of these factors within the Auckland region and other urban areas, there appears to be no equivalent concern for the problems caused by a small, scattered population in an area such as the West Coast. These areas have additional problems in gaining access to information.

Specific points of concern include:

Volunteer expenses

The isolation of groups and individuals and the distances involved in travelling to training sessions and meetings make the provision of volunteer expenses crucial.

Outside resource people

In comparison with the major urban areas, there is not usually a large pool of local expertise to call upon when setting up new programmes. Although departmental officers frequently travel through rural areas, it is difficult to get funds to bring in non-governmental people to help assess social service needs or to assist with the establishment of programmes.

Confidentiality

Confidentiality is an issue in an isolated area with regard to the use of volunteers for counselling services. A suggestion was the provision of training programmes for volunteers, which would require the payment of travel costs for both the volunteers and trainers.

Departmental boundaries

There is an urgent need to rationalise the administrative boundaries of government departments and national voluntary agencies. For the Westport area, Department of Social Welfare and Labour Department services are based in Greymouth, Internal Affairs in Christchurch and some Education and Health services in Nelson. A similar situation exists with voluntary agencies. In Tokoroa some services are run from Hamilton and others from Rotorua. A direct outcome of this is the difficulty of ensuring any form of regular consultation or co-ordination between departments. Moves towards decentralised funding such as Community Organisation Grants (COG) will have to address this issue.

Logical regions

Both the West Coast and New Plymouth workshops stressed that any decentralised system of funding allocation must adopt realistic boundaries for regions. Distances between the smaller centres, travelling time, low population densities, and spheres of interest must be taken into account. With the exception of Education Department funding of the REAP programme, inadequate recognition is currently given to this factor.

Need for innovative services

The dispersion of population sometimes requires an innovative form of service appropriate to a particular region. An example is the proposal for a West Coast telephone counselling service based in one centre with toll-free dialling throughout the region. This would be backed up by local support groups. It is uncertain whether the new DSW telephone counselling fund would see this as one or as several linked schemes for funding purposes.

Inter-departmental offices

It is not possible to have a separate office representing each government department in each rural or provincial centre. A viable alternative would be an "inter-government department" office staffed by officers with knowledge of the whole range of services, including funding and other resources.

Establishment of new services

A specific example of the need for additional resources in isolated areas was provided through the establishment of a childcare centre in Greymouth. The supervisor had had 20 years experience in foster care with the Department of Social Welfare but had had no formal training in childcare. In an urban area she could have taken part in a training course to gain the necessary qualification to be eligible for a staff subsidy from DSW. In this case, though, it was impossible for either the supervisor or the centre to afford the costs of going to Christchurch for training. Therefore, where new services are accepted by government as necessary, there should be a provision of the special resources, such as travel and training costs, that are needed to achieve this.

Communication

Isolation and distance between centres means that meetings are not always the most appropriate way of ensuring regular communication between groups and individuals. The South Westland Social Services Council, based in Whataroa, distributes a regular newsletter to 600 households at a cost of $100 per issue, using voluntary labour for collating and distribution. Existing funds could broaden their criteria to recognise the special need for communication by means of newsletters and telephone conferences in isolated areas.

Role of national voluntary organisations

As well as a lack of government services in rural areas, national voluntary agencies are often absent. This leaves the task of providing new services in the hands of local groups and individuals, who often have little experience. There was unease in one centre over the prospect of an "outside" national voluntary organisation moving in to employ a community worker. This concern was resolved through an open discussion of the proposal locally, and the involvement of other groups in planning the project. During 1986, the West Coast District Council of Social Services is planning to hold

discussions with several major national social service agencies to clarify the role that they could play in the region. This is a positive move that could result in an increase in resources to the area without the implications of an outside organisation imposing its services on the local community.

Use of existing resources

In discussing the provision of youth facilities in South Westland, it became clear that the existing resources of the area should be looked at more closely. Although there are no youth or community workers employed in the area, there are a large number of "human resource workers" who could be called upon if their expenses were recompensed and if, in some cases, this was seen as a legitimate part of their paid work. These workers include teachers, health nurses, church ministers, police and social workers. In total, such areas may have a greater provision of human resource workers in relation to the local population than many urban areas, but they often operate independently of each other.

4.6   Maori and Pacific Island groups

Early in the project it became clear that Maori and Pacific Island groups were not attending the workshops in significant numbers. As a consequence, several additional meetings and workshops were arranged with them.

Many of the issues raised, such as the difficulty of access to information, confusion over departmental responsibilities and the call for a form of decentralised funding, were similar to those made by most other local groups. However, these were often presented more strongly and several additional issues of importance emerged.

The most crucial question was where to apply for information and/or resources. With Maori and, to a lesser degree, Pacific Island groups, the existence of the Department of Maori Affairs inadvertently acts as a blockage to their gaining resources. For example, other departments frequently expect Maori Affairs to accept responsibility for any project involving Maori people, and the groups concerned will often only apply if the funds are clearly specified as available to Maori groups. In practice, this means Maori Affairs resources plus the Department of Social Welfare Tuhonohono programme. The various new programmes introduced by Maori Affairs in recent years, although directed at a greater degree of community involvement, have not in some cases been adequately discussed with the groups they affect. There is considerable confusion among Maori groups over what funds and resources are available from Maori Affairs and how they should be applied for. Local needs and priorities did not always appear to match those of the Department.

With the establishment of the Ministry of Pacific Island Affairs, some of the same problems are emerging for Pacific Island groups. Although the Ministry is not a funding body, it is viewed as one by a large number of Pacific Island groups, with the result that they put considerable effort into applying to an inappropriate agency for funds and resources. Many Pacific Island groups feel that there is something wrong with them or their project if they do not receive the funding applied for, and are therefore unwilling to repeat the process with a different department. This means it is crucial that information on funding resources is made readily available through networks and agencies such as the Pacific Island Education Resource Centre (PIERC), the Auckland Pacific Centre, the Pacific Island Churches, PACIFICA and the various Pacific Island Advisory Councils.

In the employment field there has been a call for separate funding for Maori and Pacific Island programmes, and this was accepted by the government in its employment policies announced in December 1985. Although there has been some questioning of the degree to which Maori and Pacific Island employment can be separated in urban areas, this move has been generally welcomed. Within the social services, however it is not so clear that being a Maori or Pacific Islander is necessarily the critical factor in the need for, or provision of, a service. Social services for groups such as the disabled are examples of where the type of need usually determines the form of service. With services such as those for alcoholics and drug users, Maori- and Pacific Island-directed *preventive* programmes may be preferable, but in the *treatment* area most current programmes are provided by agencies serving all sections of the community.[1]

Another problem in the urban areas is the emphasis of the Maori Affairs Department on the allocation of resources through iwi (or tribally based) structures. In Auckland, Wellington and Whakatane there was comment that, in practice, community needs and services are frequently based on the local neighbourhood group rather than on tribal affiliation. Therefore, while the bias of the funding structures is increasingly towards facilities and services that are tribally and/or marae based, these do not always coincide with local needs as expressed by Maori groups outside the formal tribal and distribution structures.

The Kohanga Reo movement is a recent and well-known example of a social service specifically directed at one cultural group, and although this form of pre-school facility, the language nest, has also been set up by Cook Island, Samoan and Tongan groups in Auckland, Tokoroa and Wellington, no specific funding has been made available. Some Pacific Island groups have received varying amounts of assistance from the Department of Social Welfare and their local city councils, but this has depended on the degree to which they are presented, and accepted, as childcare groups. This issue is looked at in more detail in the case study of the Wellington Punanga Reo appended to this report.

Funding of services to people with disabilities, as well as the elderly, youth groups, neighbourhood and family support services, generally makes no specific provisions for Maori and Pacific Island groups. This has resulted in a tendency for these services to be provided by Pakeha agencies. For example, Pacific Island churches do not generally employ social service staff. However, in Auckland, Manukau and Wellington, Pacific Island community and social workers are employed by the European churches. This may reflect the generally traditional approach of most Maori and Pacific Island churches, whereas the European churches referred to are actively involved in a variety of social issues. Within the Maori community the Ratana church has established a strong social service section, but a key to its success has been the recognition that it should develop separately from the church itself.

It is not normal government policy to provide funds for a church as such, and this has worked against applications for funds by groups such as the Pacific Island Presbyterian church in Auckland which does not recognise the distinction between the church and its social service branch in the way that the Presbyterian Social Services Support agency or the Catholic Social Services do.

A major request from Maori and Pacific Island groups is that there should be more field workers (social workers, probation officers, Education Department pre-school workers,

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1   A pilot Maori orientated alcohol treatment centre was opened in Auckland by the Minister of Maori Affairs in June 1986.

etc.) from their communities employed by government departments. There is a strong feeling that the departments need to change their approach so that they respond to the community they are based in rather than establishing separate services. In the Otara workshop, it was suggested that government officials should change their attitudes. They should be seen as servants of the community, with a responsibility to understand its needs and to ensure that their departments work to meet these needs. Instead, they are often seen as gate-keepers and policing agents of government.

A number of conflicting views were raised in the consultations with Maori and Pacific Island groups. It is apparent that their concerns are based on a general feeling of dissatisfaction with the current provision of social services, including the funding of voluntary groups. How these conflicts should be resolved is not so clear, as there have been a variety of initiatives, both from the community and from government, in recent years. These include:

- the provision of specific separate services, e.g. the pilot alcohol treatment centre in Auckland, Kohanga Reo, and Punanga Reo;

- the increased employment of Maori and Pacific Island staff within existing departments, e.g. DSW, Health, Education;

- the transfer of responsibility for services to the Department of Maori Affairs and Ministry of Pacific Island Affairs, e.g. employment programmes;

- a move towards a change of attitudes throughout a complete department - i.e. DSW.[1]

Determining the most appropriate response is complicated by the tendency of policy-makers to see the Maori and Pacific Island communities as cohesive groups. The Maori and Pacific Island Employment Programmes, in which responsibilities for funds allocation has been transferred to the community level, and the DSW review in consultation with the Maori community, give some indication of how the issues can be effectively tackled. The recommendations in *Puao-te-ata-tu* provide for a more detailed debate on the various approaches which will include community input.

4.7   The consultation process

Consultation overload

Over the last eighteen months, discussions on various areas of social policy have been initiated by government. These have included: the establishment of the Ministries of Women's Affairs, Consumer Affairs and Pacific Island Affairs; the Budget '85 Task Force; investigations into the future of sport and recreation (two separate projects); the Education Department curriculum review; reviews of the operation of the Department of Maori Affairs and Labour Department policies; and the 1986 DSW Task Forces on Social Welfare Services and Benefits. Further input will be called for by the Royal Commission on Social Policy in 1987. It is clear, however, that those consulted in each case are frequently the same people.

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1   *Puao-te-ata-tu (Daybreak), Report of the Ministerial Advisory Committee on a Maori Perspective for the Department of Social Welfare*, Wellington, June 1986.

The importance of feedback

Many people in the community are dissatisfied with the lack of feedback they have received from groups consulting and/or researching them. Many community groups are confused about the exact purpose of the various consultations. A group in Whakatane talked about the Sports Enquiry Task Force and confused this with the Budget Task Force. What the term actually meant, and which particular task force it was worth spending time with, was unclear to the group.

Time commitment

Another major concern over community consultation is the amount of time that the groups being consulted can afford or are willing to commit to a particular project. This is crucial if the intention is to make contact with informal community groups or with any locally-based voluntary organisations that are outside existing departmental networks. More than one visit to an area may be needed so that groups have time to consider their participation and response.

Depth of consultation

If time is short, there is a tendency to skim across the surface of a topic, meeting with a wide range of people (and hence having a long list of "persons consulted") and yet not having a useful discussion with any. The concentration on large numbers rather than on the *quality* and *depth* of consultation can result in a false picture of community feelings.

Honesty and openness

The most crucial factor in any consultation is that it be *honest*. Many groups felt that policy directions had been decided in advance, such as GST, and that the consultation was just a charade. Real consultation must begin with a question requiring a response, not with a decision requiring confirmation. Discussing the implementation of a decision with the community may be useful to the government, but it is not consultation as the community would like it to be.

Guidelines

Guidelines for future consultation with community groups include:

-      Adequate time must be allowed to enable at least two visits to each group or area - one to provide information on the project, and the second to gather a response.

-      The purpose of the consultation must be clearly and simply set out.

-      Those consulted must be kept informed of progress and told of the eventual outcome of the project.

-      Consultation procedures should recognise the importance of in-depth consultation and not concentrate on numbers alone.

Within each community, one particular group cannot be expected to represent all members. This is particularly important with Maori and Pacific Island groups. A number of Pacific Islanders talked of the need to see the different island groups as being distinct. Similarly Maori groups made it clear that they did not speak for the "Maori community". The identification of appropriate groups can only be carried out at the local level.

5. CONCLUSIONS AND RECOMMENDATIONS

This research project has not examined the quality of service provided by either the voluntary sector or by government departments, it has simply looked at the demand for resources from the voluntary sector, the provision of resources by government and the match or mismatch between the two. A simple demand for more resources does not necessarily indicate that these should be automatically provided, but it would seem that the voluntary social services sector is seriously under-resourced in relation to the tasks that it is expected to carry out. Voluntary agencies and informal groups usually take on the difficult developmental, preventive and non-institutional social service activities while being denied the ongoing funding and other forms of assistance that are necessary for this to be done effectively. It seems that "cost-saving" has often replaced "cost-effectiveness" in government's relationship with the voluntary sector and this has been counter-productive in providing a genuine alternative to institutional social services.

The very small proportion of government expenditure spent on support for voluntary social service agencies, especially smaller community-based groups, is overshadowed by the total expenditure of the social service departments. Public and political criticism of the cost of the welfare state has a flow-on effect leading to criticism of expenditure on the voluntary sector. It is also easier for departments to effect economies by cutting grants to this sector than by looking seriously at their core programmes. Although practically every voluntary group we met with was experiencing funding difficulties, little militancy was apparent. In fact most groups were more concerned with getting on with the job of providing a service than with lobbying for the resources needed to do this effectively.

Where government policy is based on the use of voluntary agencies to deliver a service, with the Justice Department's moves towards community support services, for example, the government has a responsibility to provide realistic resources to enable this to happen.

The appropriate level of funding depends on how much of its total income New Zealand society wishes to spend on social services and the proportion of this to be raised outside the government sector. One problem that the non-government sector faces in making a case for additional resources is its traditional dependence on unpaid labour and cost-saving as a justification for its existence. Effectiveness and appropriateness of service would be more relevant criteria for the involvement of the voluntary sector than the cheapness of a particular service.

There have been recent moves towards reviewing the appropriateness of voluntary input to the social services and the level of remuneration of paid staff in the voluntary sector. A Social Advisory Council working party is currently looking at the role of volunteers in government departments, while the Federation of Voluntary Welfare Organisations published a report in 1985 on *Industrial Relations in the Voluntary Welfare Sector*. This report raised some serious questions about the current levels of remuneration of service providers in this sector. Payment is usually restricted by the level of government grants and this frequently bears no relationship to wage movements in the private or public workforce.

If the government wishes to have certain services delivered through the voluntary sector then one condition of this should be that individuals working in comparable positions should have comparable working conditions, including remuneration. As a start, voluntary organisations receiving a contribution from government towards their

operating costs should be required to accept the appropriate trade union conditions. This is currently not the case with some of the large voluntary organisations, for a variety of reasons, one being their inability to ensure that these wage rates could be paid from present levels of government subsidy.

Another issue which is associated with the level of government funding is the relationship between government and the Lottery Board distribution committees. As has been mentioned elsewhere in this report, most voluntary agencies find it difficult to make any meaningful distinction between government and Lottery Board. The distribution committees are administered by government departments and some agencies have negotiated grants with Ministers only to discover that the money has been paid from the Lottery Board. In other cases, departments, particularly Internal Affairs, have used the Lottery Board in order to obtain resources for their own programmes. With the impending introduction of Lotto and the probable consequent increase in distributable funds, the nature of this relationship and the definition of what is accepted as a governmental responsibility requires urgent consideration.

The provision of non-financial assistance to voluntary groups can be of greater value than a cash grant. Access to these resources is at present very selective, but where it occurs the departmental/voluntary agency partnership appears to work well. The extension of community access would be a major step in developing a real partnership in the provision of social services. And it is essential that every attempt is made by departmental advisory officers to ensure that access is provided to the groups that most effectively meet community needs.

Information on all government resources available to the voluntary social services - financial and non-financial - must be openly provided through appropriate community networks. The innovative moves that are already taking place in different areas of the country need to be recognised and promoted so that they do not remain as exceptions to the rule, but become integrated into the country's social service delivery system.

Recommendations

For immediate action

1. That, as an immediate short-term move, there be a review by government of all current funding procedures across departments, including areas such as criteria, application forms, publicity and the decision-making processes.

2. That all departments providing funds to voluntary social service groups, including the Lottery Board, be requested to provide information leaflets, in simple English, with details of their funds. That these be distributed through community networks, including local authority community workers and community educators, and that special attention be given to contacting Maori and Pacific Island networks.

3. That a simple booklet be produced, possibly by the Department of Internal Affairs, listing *all* departmental and Lottery Board discretionary funds, together with details of how to apply for funds, and that this be regularly updated.[1]

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1   This recommendation has now been taken up with the inclusion of this information in *Towards Community*, Department of Internal Affairs, 1986.

4. That urgent attention be given to the relationship between government and the Lottery Board. This would include an examination of the areas that are, or should be, a statutory government responsibility and those that could be funded through the Lottery Board.

5. That regular inter-departmental meetings, both at head office and district office levels, be established to ensure the sharing of information and the co-ordination of government activities.

6. That where voluntary agencies are refused funds from government sources, the reasons for refusal be supplied on request, and an appropriate appeal procedure made available.

For action in the medium term

1. That government establish a social policy unit to provide an overview of social policy and programmes in all government departments. This unit would assess new and changing social needs and ensure that appropriate government resources are provided for needed services. It is suggested that the unit be independent of the service delivery departments, and report directly to the Cabinet Committee on Social Equity.

2. That government departmental field staff move towards a supportive and advisory role in relation to voluntary groups. This is essential to the provision of support for any decentralised funding system and to encourage community involvement in policy making.

3. That the recruitment and training of government staff more closely reflect the groups with which they work. This requires a more sensitive recruitment and training process that recognises cultural and language skills. A policy of positive discrimination in recruitment to include women, members of ethnic minority groups and the disabled is required, together with a special emphasis on the in-service training of these groups to ensure that they do not simply remain within basic grade positions.

4. That an improved system of evaluation be developed that will involve a three-way partnership between government, voluntary organisations and their client groups. This would take full consideration of the value of the service and not be confined to assessing an organisation's bookkeeping ability.

5. That the devolution of the allocation of existing departmental funds to the local community be encouraged through the development of the Community Organisation Grants programme. This requires that a permanent network of regional advisory officers be established and that there is ongoing communication between departments. Eventually, there would be an integrated, locally-allocated funding system, with sector groups to cater for specific needs. A link with the appropriate local authority would encourage the development of a social planning process.

6. That a condition of a voluntary agency receiving government funding be that provision is made for consumer involvement in its policy-making and management structures.

7.   That the current balance between preallocated and discretionary funding be reviewed. There should be a consideration of the resources going to the large, established, national organisations in relation to local needs and the development of alternative, community-based services.

8.   That resources be clearly allocated for needs assessment and community-based research. This could be achieved through setting aside a proportion of the Social Sciences Research Fund for this purpose.

9.   That more effective community consultation processes be instituted. Research should be carried out on the nature of existing procedures and their effectiveness, and an improved model developed.

10.   That provision be made for the payment of the expenses of all voluntary workers in the social services sector.

11.   That the value of non-financial forms of assistance to the voluntary social services sector be recognised, and government departments be encouraged to extend access to their resources by community groups wherever this is appropriate.

APPENDIX

The Newtown Punanga Reo (Cook Island Pre-school): a case study

The Cook Island community in Newtown, Wellington, set up its own version of the Maori Kohanga Reo in April 1985. The premises were provided by the Newtown Cook Island Society in a recreation hall built on City Council land.

The programme is supported by a Cook Island Community Officer working with the Department of Maori Affairs. This has ensured some advisory input through the Poneke Kohanga Reo Trust Training Branch. However, Kohanga Reo funds are not available to the centre as it is not a Maori programme. Unsuccessful applications for funds were made in 1985 to the Maori and South Pacific Arts Council, PACIFICA, Polynesian Education Foundation and the Maori Affairs Department.

The centre appears to be meeting a local demand with up to thirty families taking part. Staffing has been provided through Labour Department training programmes. Some small grants have been received from the local Recreation and Community Development scheme, and the Wellington Community Childcare Association gave a grant of $300 towards equipment out of its community creche fund.

Long-term funding of the programme, especially the funding of staff costs, is difficult because it does not fit into a specific category. It is not a kindergarten, playcentre or playgroup and therefore does not meet Education Department criteria for funding; it cannot apply for Kohanga Reo funds; and the Ministry of Pacific Island Affairs does not have funds for such projects.

At the time of visiting, the Punanga Reo did not meet the regulations for a full-time childcare centre and so could not receive grants from the Department of Social Welfare. At the same time, the organisers did not see it as being simply a "childcare" centre as children attend both with and without a parent. However, the Punanga has now been approved as a "special purpose" childcare centre, and in March 1986 parents were receiving the childcare subsidy payments. Apart from the DSW capitation payments, which are directed at the users, not the centre, the only funds available are those designated for "community" purposes rather than specifically for pre-school purposes.

This highlights one of the major advantages of the previous Labour Department schemes. The criteria were broad and could be stretched to meet the needs of most voluntary groups as long as staff employed were recruited from those registered with the Labour Department. Approval was made at a local level, which enabled programmes of relevance to a specific community to receive assistance.

At the same time the organisers do not necessarily wish it to fit within a specific existing category. As with the Kohanga Reo, this is a new concept that includes some elements of a number of pre-school services together with the addition of language and culture, which places it clearly outside existing criteria.

There are several similar centres around the country. These include a Cook Island playgroup in Tokoroa, a Samoan centre in Herne Bay, Auckland, and a Tongan centre in Ponsonby, Auckland.

Issues:

1.   The difficulty of gaining resources for a new service, even if it is one that relates closely to an existing sector - i.e. pre-school education.

2.   The importance of having advisory support and access to existing resources, especially accommodation, in getting such a project established. The Newtown group was assisted by a Maori Affairs Community Officer, the Auckland Samoan centre is based at the Pacific Island Education Resource Centre, the Tokoroa playgroup is associated with the Pacific Island church, and the Tongan group is based in the City Council-owned Ponsonby Community Centre.

3.   A major source of salaries for voluntary groups in this indeterminate category has been the Labour Department employment and training programmes, even though they were not designed for this purpose. Local decision-making and broad criteria have enabled a wide variety of services that meet local needs to be established. With the phasing out of current schemes and the concentration on training, many groups are likely to have difficulties in this area.

4.   The pressure placed on newly-established community programmes to fit into departmental criteria - i.e. to identify the service as a kindergarten, playcentre, playgroup, childcare centre, casual creche or Kohanga Reo - in order to gain funding. How does a group providing a service that is outside these categories, or which overlaps them, gain resources?

5.   The Department of Social Welfare has shown some flexibility in using the category of "special purpose" childcare centre (which usually describes centres for the disabled or intellectually handicapped) to cover initiatives outside the usual criteria which are meeting a recognised community need. This policy could usefully be adopted more widely by the DSW and other departments to reduce the pressure on groups to mould their operation to meet funding criteria.

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