SURVEY REPORT

2021 - 2022

COUNCIL *for* INTERNATIONAL DEVELOPMENT

WWW.CID.ORG.NZ

WHO WE ARE

The Council for International Development (CID) is the umbrella organisation that unites and supports New Zealand's international NGOs and organisations working in development. We strengthen our members, support them to develop skills and professional standards, influence governments and policy-makers, and bring the sector together to share expertise.

WHAT IS THE CID SURVEY FOR?

The CID Annual Membership Survey is funded by the Ministry of Foreign Affairs and Trade (MFAT) and is used for a number of different things. It provides information on the sector, where we work, priority areas and so on, and is a requirement for all CID members – Full, Affiliate and Individual/ Consultant. While it does not purport to be robust research, the survey's results are shared with various government agencies including MFAT and Statistics New Zealand who include the value of foreign aid that we send overseas in New Zealand's International Accounts, as well as being shared with members and the general public.

The results of the survey provide insight around the countries Aotearoa New Zealand-based organisations focus on, the areas of greatest need, how much money is being spent on international development and more, from organisations that are funded by MFAT as well as those that aren't.

This information supports decisions around government involvement in our sector. We also use the data collected to calculate our membership fees. The responses we receive remain confidential to CID, in that no publicly shared answers are attributed to specific respondents.

This report provides analysis and comparison on certain areas of the survey that we believe are relevant and of use to the wider sector and public. If you took part in the survey, you might notice that not all questions included in the survey are included in the report; this is because we use different responses for different things. If you would like information on a question you answered that you don't see included in this report, please feel free to get in touch with us. We greatly appreciate the time and mahi everyone puts into the survey each year and appreciate ongoing feedback on ways we can improve it.

METHODOLOGY

The Council for International Development Annual Membership Survey is a year-on-year snapshot of the international development sector in Aotearoa New Zealand.

The survey was conducted in June - August 2022 and covers the last financial year for each member (July 1 2021 – June 30 2022). The online survey provides responses from 58 out of 86 Full, Affiliate and Individual/Consultant CID members (as at 30 June 2022). All members were given the opportunity to provide feedback in key thematic areas: size, scope, finances, and priorities; satisfaction with MFAT partnerships and with CID; as well as views on future direction. This year we asked more specific questions around our memberships' mahi on Sustainable Development Goals, as well as including one around faith-based organisations.

The Survey captures quantitative and qualitative data to understand CID members' global presence and state of operations. While the survey invites respondents to self-reflect on perceived strengths and weaknesses of their individual organisations and the sector, it does not aim to evaluate the effectiveness of the sector's development impact and performance across countries or themes.

It is important to note that this is a survey, not formal academic research, providing a snapshot of our membership, its mahi, and trends in recent years.

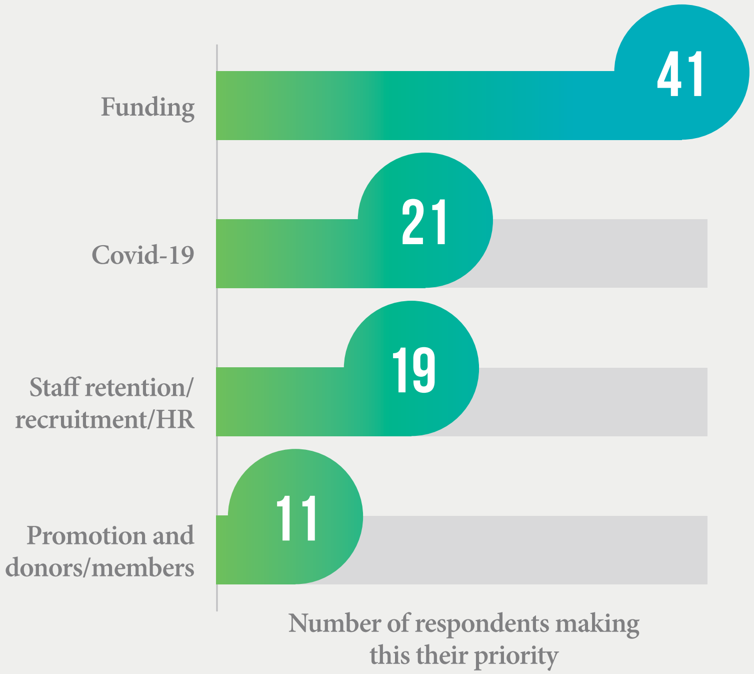
This year 58 CID members responded to the survey, representing 67% of our members at June 30. Our membership has grown in the last year: in 2021 we had 60 Full and Affiliate members, with 48 taking part in the survey. This equated to 80% of members responding to the 2020-2021 survey. This year however, we have more members overall, with a total of 86 eligible to take part in the survey at the time it was disseminated.

While we encourage all members to participate, we are particularly drawn to the responses from Full Members. We received responses from 79% of our Full Members this year. We're very grateful to the 53% of our Affiliate, CRI, University, and Individual Members that completed the survey this year as well.

KEY FINDINGS

- **There was only one change in top 10 countries worked in – Solomon Islands moved from 20th (in 2020-2021) to 8th place this year, and Myanmar dropped from 9th to 14th place**
- **Increased spend internationally this year, up 9.7%**
- **Gender balance still very uneven with the overwhelming majority of the workforce being female, with males still taking up the most governance roles**
- **Funding remains a key concern, as well as staff recruitment and retention**
- **Mahi performed with local NGOs has increased by 21% this year, with 51% of organisations reporting increased localisation efforts**

MOST PRESSING ISSUE FACING YOUR ORGANISATION TODAY



OTHER NOTABLE ISSUES FACING MEMBERS

- Shipping costs and supply chain issues
- Localisation challenges
- Financial management capacity of partners
- Volunteer capacity
- International view as opposed to national view
- Demonstrating relevance and effectiveness
- Engagement of Māori and Pacifica young professionals
- Empowering Women
- Inflation
- Technological disruption and changing media consumption preferences
- Global instability
- In-country constraints and security
- Networking with other organisations in the same field
- Geo-politics of Pacific region
- Wellbeing of kaimahi in these uncertain and volatile times
- Increasing use of technology to drive efficiencies and ensure low-income countries are not left out

COVID AND ITS IMPACT ON THE SECTOR

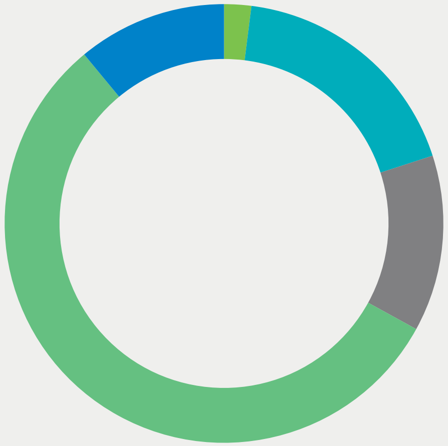
We all know that Covid-19 has had a drastic impact on the sector in the past two years. In last year's survey it was the most pressing issue impacting the sector. Many of our members have reported this as an issue of ongoing concern. The most significant problem reported by members was that travel restrictions resulted in an inability to scope and plan projects to their desired standard or in their preferred manner. They have also struggled to develop partnerships virtually, particularly in environments where in-person interactions are essential for successful partnership, or where there is significant internet poverty. Of those organisations that would regularly travel to the countries where their programmes operate, anecdotally many have stated that being able travel in the first half of 2022 has changed their ability to carry out their mahi considerably, and most are planning trips for the second half of the year, if they have not already been.

WORKFORCE PROFILE

In comparison to last year's survey, there hasn't been a huge change in the primary identification of people working for members in Aotearoa by ethnicity or gender. This is not surprising but is something CID is considering looking at more thoroughly, as the survey is usually completed by CEOs or Senior Leaders, and it is reasonable to assume that some of those filling out the survey may not be aware of the ethnic or gender make up of staff when they are completing the survey. Consequently, we feel this data may not truly reflect the make up of the sector and would like to hear your feedback on how this information could be captured appropriately and accurately.

It is positive to see an 8% increase in staff that identify as Pacifica since last year, with a decrease of 8% Pakeha/European. It is too oversimplistic to presume that one has taken over the other, but it shows movement in a positive direction regarding representation of Pacifica communities within organisations that are increasingly focusing their work in the Pacific. Representation of Māori staff/kaimahi has decreased by 1% this year, and we would hope to see that increase in the coming years.

2021-2022 PRIMARY IDENTIFICATION OF PEOPLE WORKING FOR MEMBERS IN AOTEAROA BY ETHNICITY



- 2% Māori
- 18% Pacifica
- 13% Asian
- 56% European
- 11% Another Ethnicity

2020-2021

- 3% Māori
- 10% Pacifica
- 64% European
- 6% Asian
- 17% Another Ethnicity

GENDER REPRESENTATION IN AOTEAROA-BASED WORKFORCE

0% Gender diverse
26% Male
74% Female

GENDER MAKE UP IN SENIOR LEADERSHIP ROLES

0% Senior leadership roles - Gender diverse
34% Senior leadership roles - Male
66% Senior leadership roles - Female

GENDER MAKE UP IN GOVERNANCE ROLES

0% Governing - Gender diverse
58% Governing - Male
42% Governing - Female

GENDER REPRESENTATION IN AOTEAROA-BASED WORKFORCE

The representation of wahine in the overall workforce has increased by 14% from last year, to 76%, with tāne making up only 26% of staff based in Aotearoa. Those that identify as gender diverse make up only 0.16% of staff in the past year, with just one respondent, down from 3 respondents last year. This is an area we would love feedback on, around how we can better capture the diversity of our sector.

GENDER MAKE UP IN SENIOR LEADERSHIP ROLES

This year we see an increase in females in leadership from 57% last year to 66% this year.

GENDER MAKE UP IN GOVERNANCE ROLES

Female representation in governance roles remains low, decreasing this year to 42% from 46% last year. Considering the overall representation of females working in the sector, the representation of wahine in governance remains low and appears to be decreasing.

AOTEAROA-BASED VOLUNTEERS AND STAFF

OVERSEAS-BASED VOLUNTEERS AND STAFF

AOTEAROA-BASED VOLUNTEERS AND STAFF

Volunteers now make up more than half of the workforce here in Aotearoa at 60%, which is an increase from 52% last year. This could lend itself to the overall rhetoric of community and kindness that Aotearoa has espoused since the start of the pandemic.

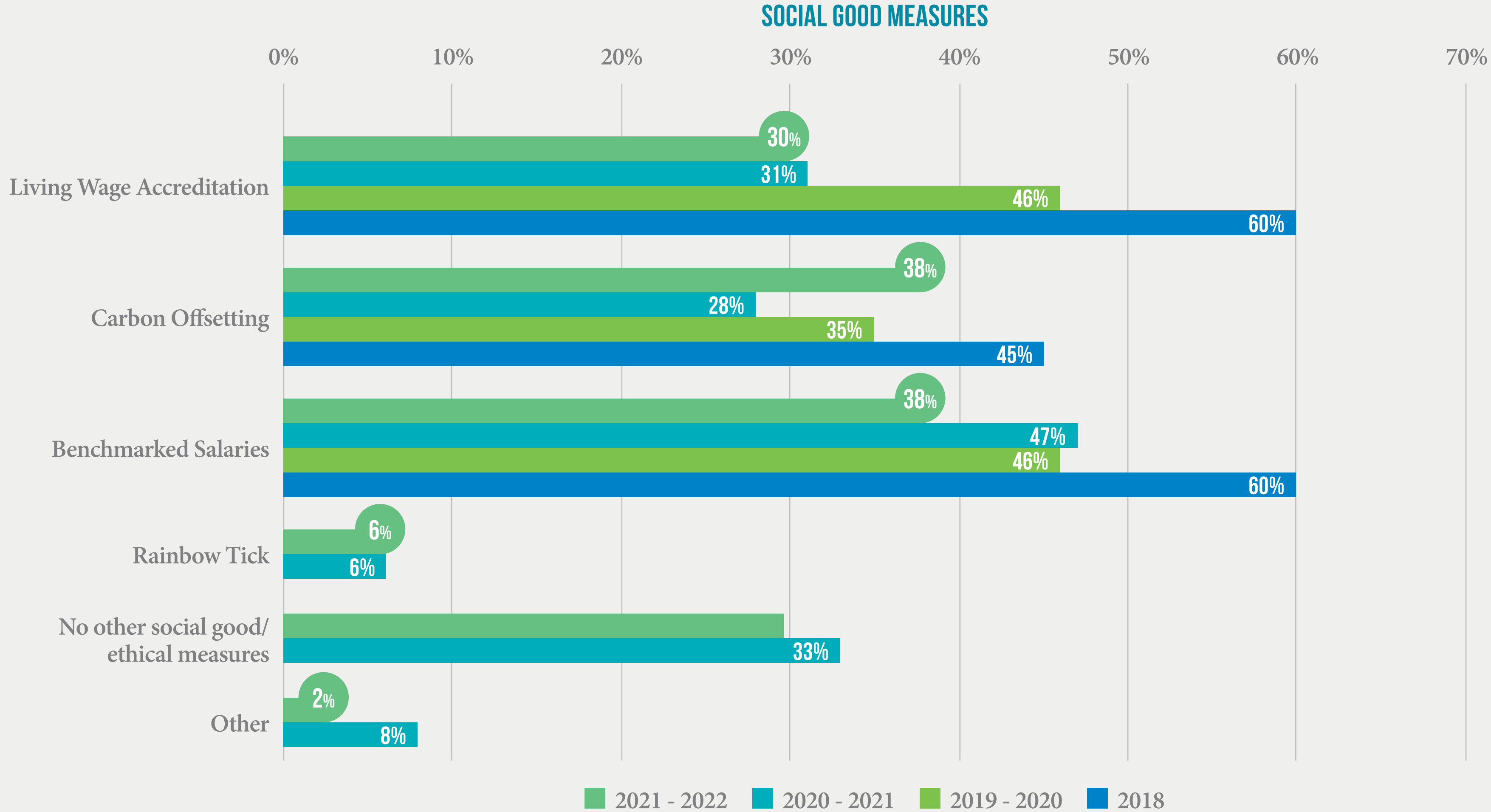
OVERSEAS-BASED VOLUNTEERS AND STAFF

Of overseas-based staff and volunteers, we see that volunteerism is much lower, at just 17%. This is what we would expect considering most areas we work in as a sector support communities, and we would hope more local staff are paid than are volunteering.

SOCIAL GOOD MEASURES

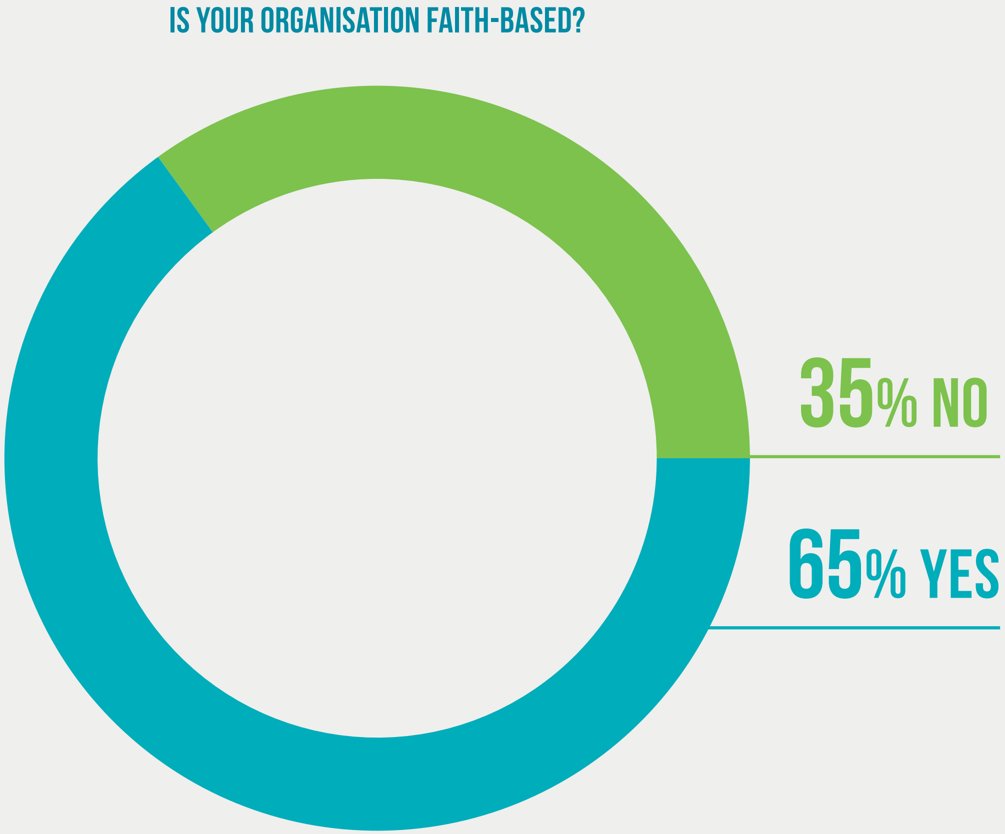
We note the significant drop (since 60% in 2018) of members having Living Wage Accreditation. We do not know if this means fewer members are accredited, or whether fewer members are paying their staff a Living Wage – any insights from the membership is much appreciated.

100% of CID's full membership has either gained code signatory status, or are within the process requirements for attaining or renewing it.



FAITH-BASED ORGANISATIONS

This is the first time we have asked this question in the survey, giving further insight into the sector and our membership. Off the back of this result we are pursuing ways to explore this further with our membership, including our first podcast episode on the topic, as part of our Useful Outsiders podcast series.



FINANCE

TOTAL DEVELOPMENT SPEND

Funding sources remain similar to previous surveys. Public support is still the largest source of income by far, with almost 50% of all funding coming from the public.

This year we have seen record a high in development expenditure, surpassing the previous highest year of $215milion in spending in 2016-2017. In 2020-2021 the total spend was $196 million, with a similar amount in 2019-2020. This year however, we have seen the total development spend reach $236million – an increase of 9.7%.

2021-2022

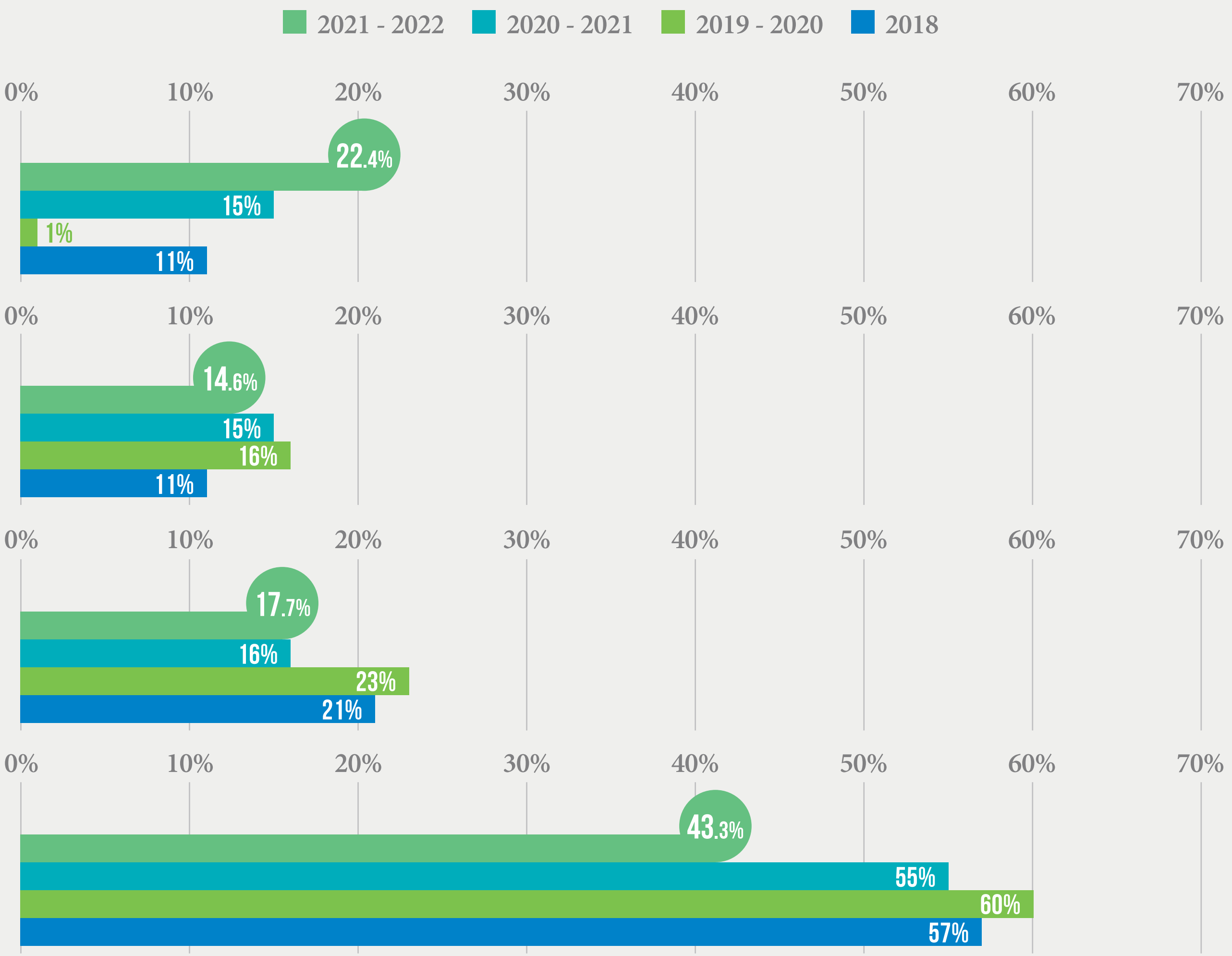
TOTAL DEVELOPMENT SPEND

$236M

INCREASE OF 9.7%

Analysing the breakdown of funding sources below, we are keen for your thoughts as to where this increased additional funding has come from: it would appear the lift has been derived from Sales, Services and Investments. We will investigate this further, and welcome your insights.

WHERE HAS THIS FUNDING COME FROM?



SALES, SERVICES, INVESTMENTS

Significant increase in this area of funding for 2021-2022. Discounting 2019-20 with members not completing this question and given the increase in members.

MULTILATERAL ORGANISATIONS

No notable change.

MFAT/GOVERNMENT

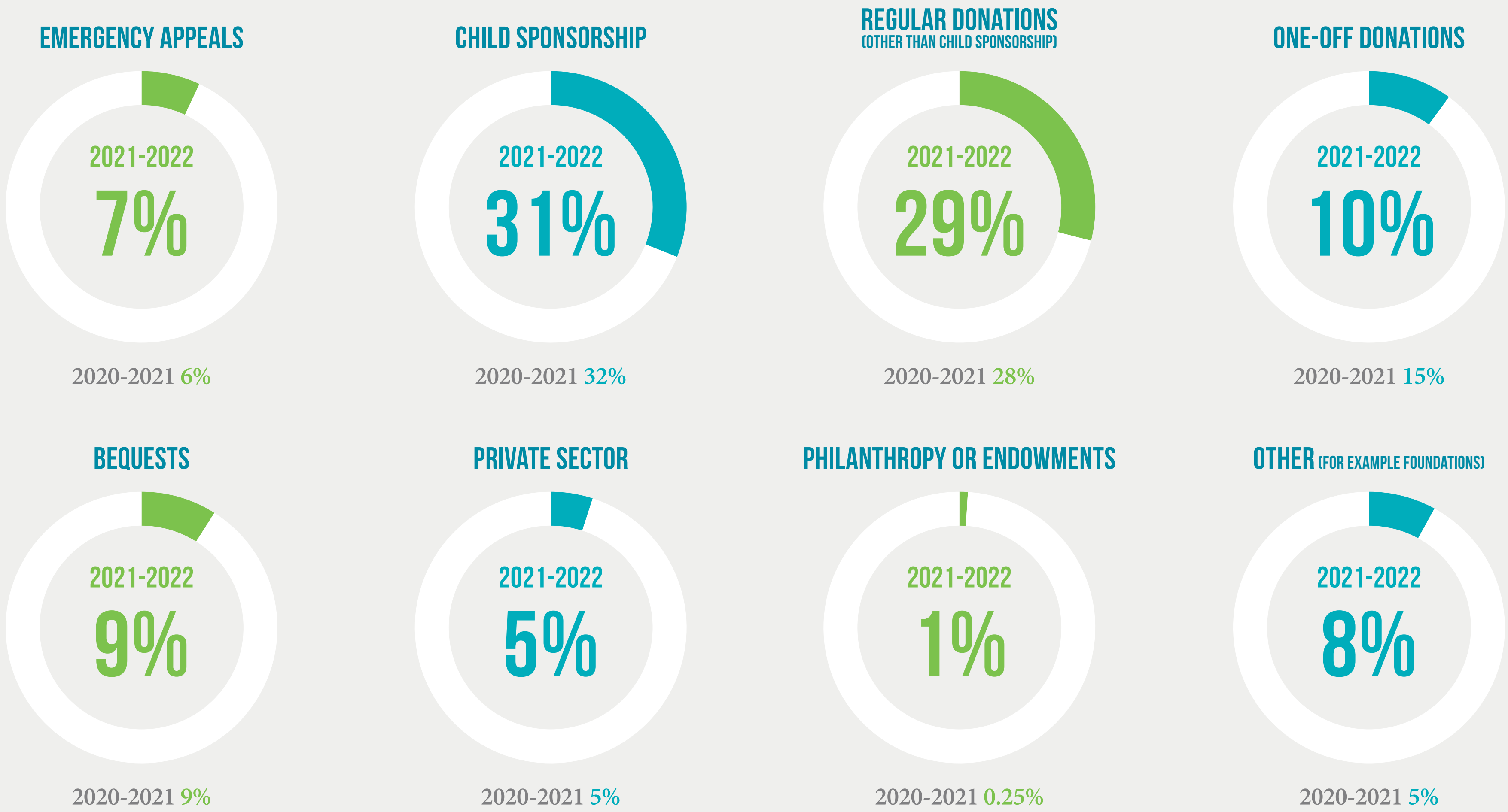
In a positive sign we are seeing a slight increase in government funding.

PUBLIC FUNDING

While down 10% overall on last year, Public Funding is still by far the largest area of funding.

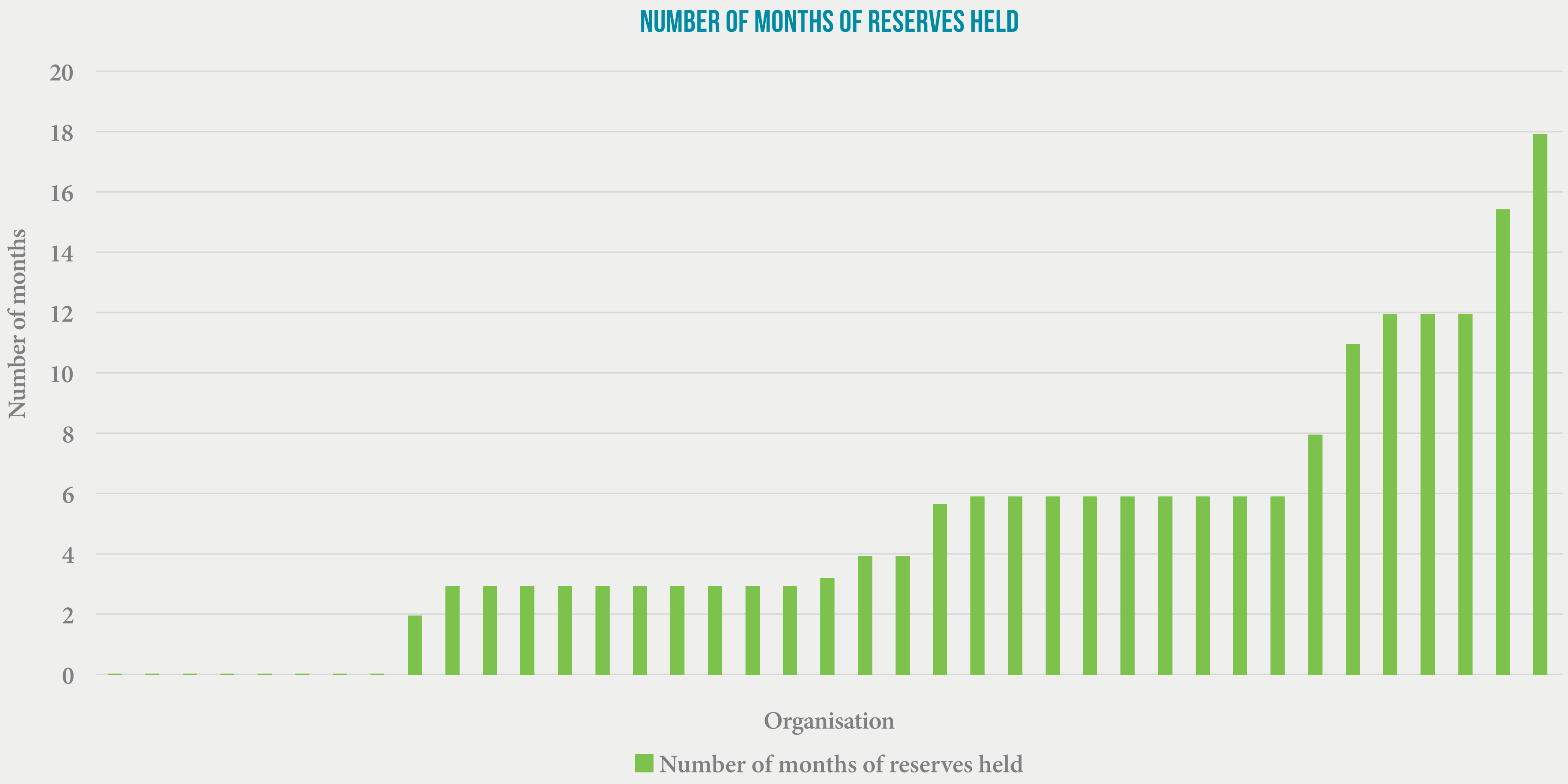
PROPORTION OF PUBLIC FUNDING BY TYPE

There is no noteworthy difference in the proportion of public funding by type, with most areas remaining close to exactly the same as last year.



FUNDING RESERVES

The health of the sectors' overall financial state is evident in the average 10-months of reserves held by our members. However it's important to note the median is only 6 months, with 8 respondents having 0 months in reserve.

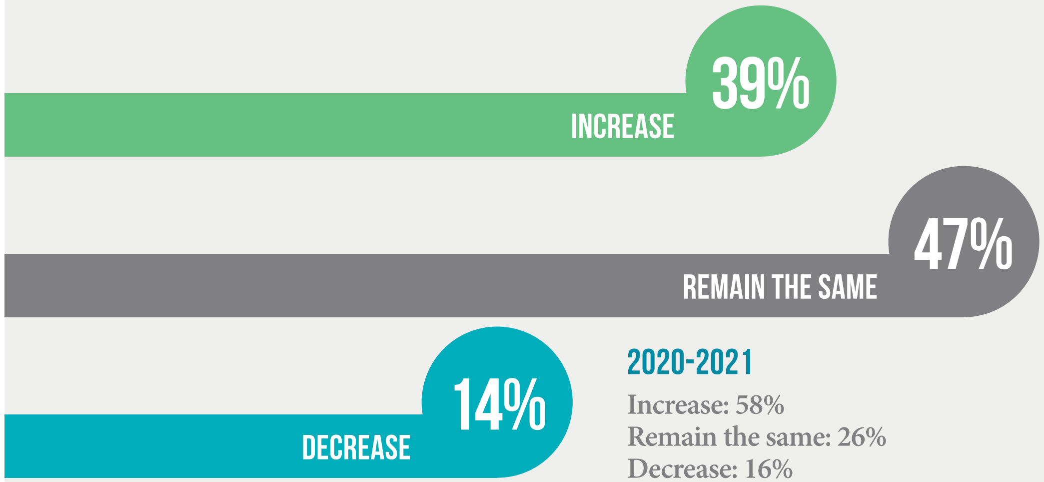


FINANCIAL EXPECTATIONS IN THE COMING YEAR

Last year the survey informed us that 58% of our members believed their income would increase in 2021-2022. The results of our financial analysis confirm this belief, with overall income in the sector at a record high. However, while this increase is positive, the sector is not so confident that this will continue, with a 19% drop in this expectation, and almost half our respondents believing their income will stay the same in the coming year. There could be several reasons for this, including final MFAT funding agreements being made, which would indicate government funding will stay the same for several organisations for the next few years.

We note that 22% of respondents have signalled they are exploring merging with other organisations – i.e. 1 in 5 of our members. We will expand on this topic throughout the year to learn more about your plans, and the role CID can provide in facilitating this. We look forward to any further information you may have.

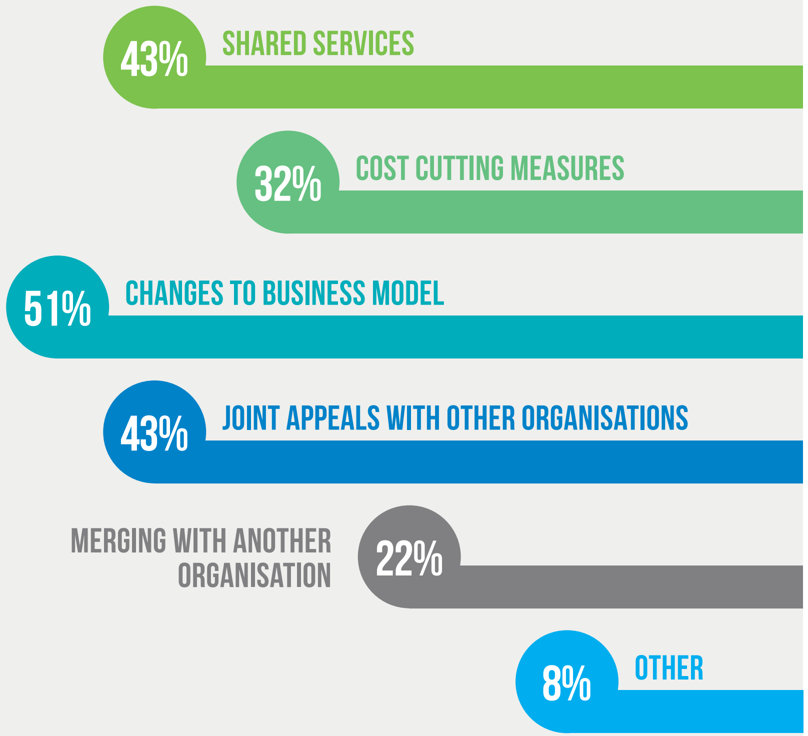
COMPARED TO YOUR LAST FINANCIAL YEAR, DO YOU EXPECT YOUR INCOME IN THE NEXT FINANCIAL YEAR TO:



2020-2021

Increase: 58%
Remain the same: 26%
Decrease: 16%

IS YOUR ORGANISATION CONSIDERING ANY OF THE FOLLOWING?



2020-2021

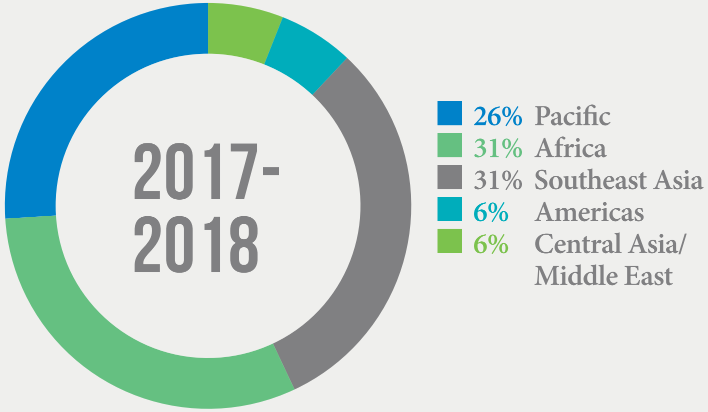
Shared services: 50%
Cost cutting measures: 50%
Changes to business model: 73%
Other: 8%

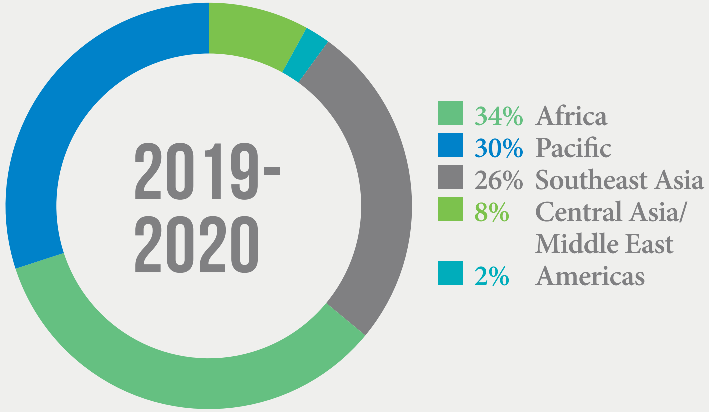
NB: in 2020-2021 this question was prefaced with “in light of Covid-19”

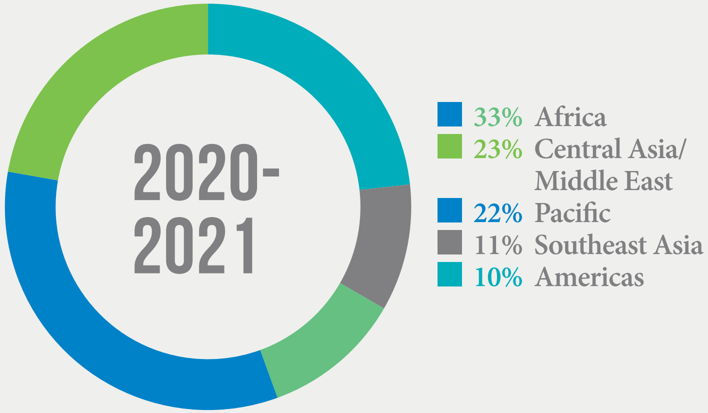
CHANGE IN TOP 10 COUNTRIES

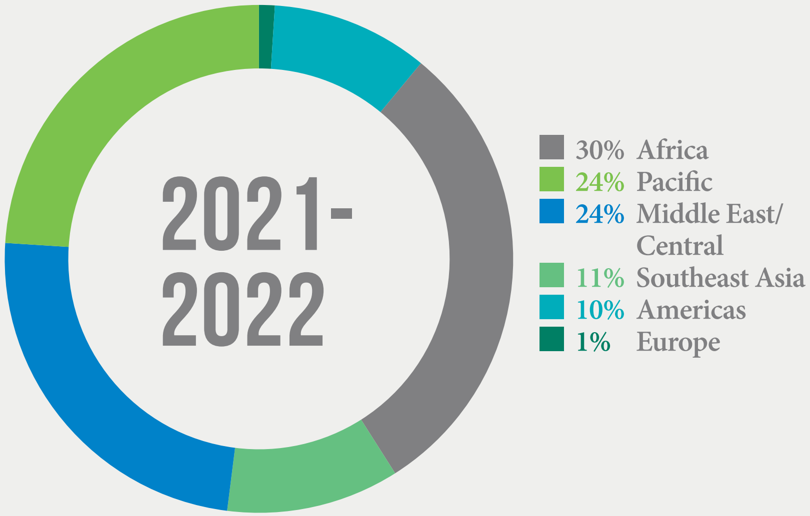
The only change in the top 10 countries other than their order, is that Myanmar is no longer in the top 10, with Solomon Islands taking its place. Myanmar has moved to 14th place in overall spend. In 2020-2021 Solomon Islands was ranked number 20 in the location of spend.

LOCATION OF SPEND

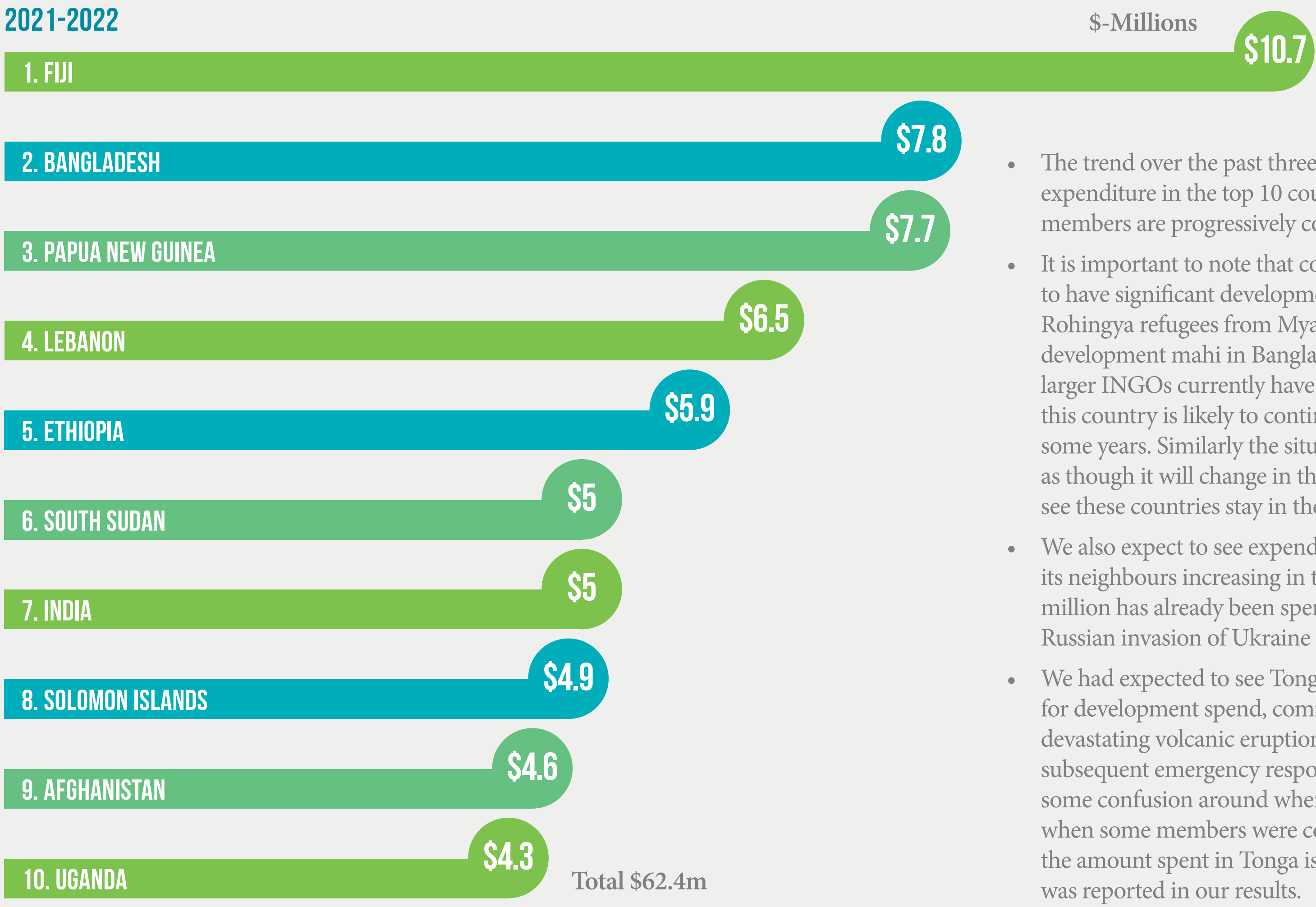








TOP 10 COUNTRIES FOR DEVELOPMENT SPEND



- The trend over the past three years has seen the overall expenditure in the top 10 countries increase. Does this suggest members are progressively consolidating their programming?
- It is important to note that countries like Bangladesh are likely to have significant development expenditure being spent on Rohingya refugees from Myanmar, rather than more "traditional" development mahi in Bangladesh. We also know that some of the larger INGOs currently have a focus on Fiji, so the expenditure in this country is likely to continue to keep Fiji high in the top 10 for some years. Similarly the situation in Afghanistan does not look as though it will change in the immediate future, so we expect to see these countries stay in the top 10 for some time.
- We also expect to see expenditure in countries like Ukraine and its neighbours increasing in the next year. In 2022 just under $1 million has already been spent supporting those impacted by the Russian invasion of Ukraine from February-June.
- We had expected to see Tonga higher in the list of countries for development spend, coming in at number 27, due to the devastating volcanic eruption and tsunami in January 2022 and subsequent emergency response. However, we believe there was some confusion around where to report this emergency funding when some members were completing the survey, meaning that the amount spent in Tonga is actually much higher than what was reported in our results.

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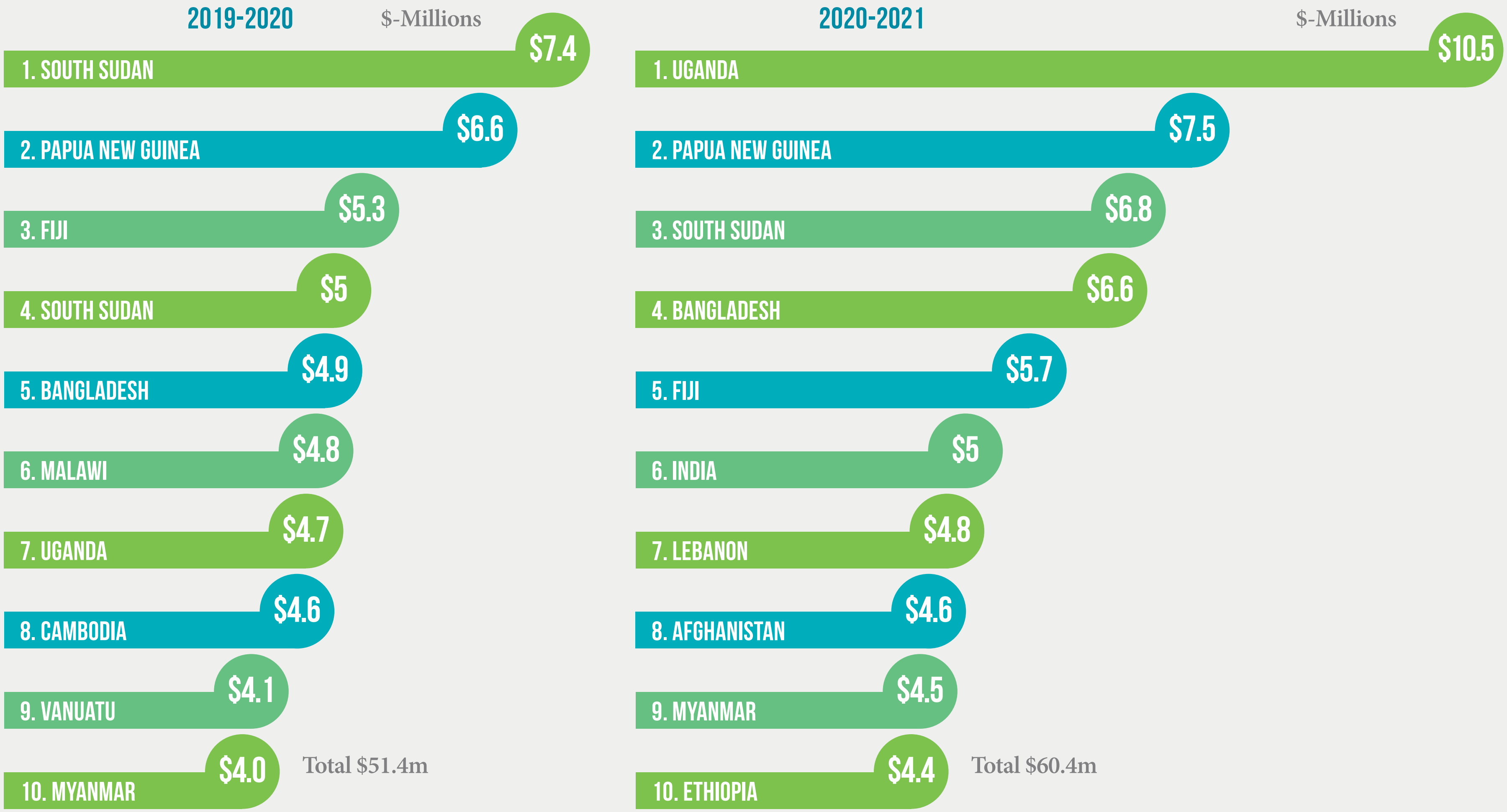
TOP 10 COUNTRIES FOR DEVELOPMENT SPEND (CONTINUED)

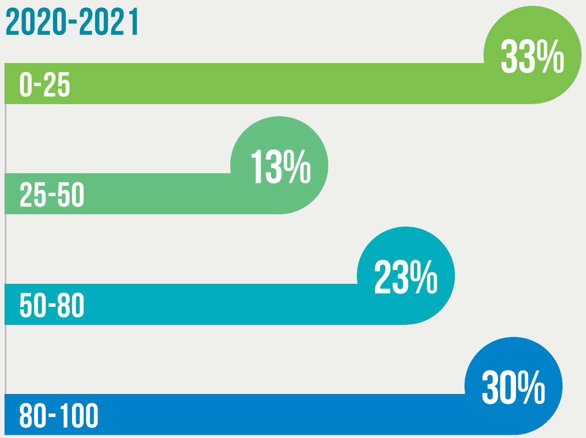


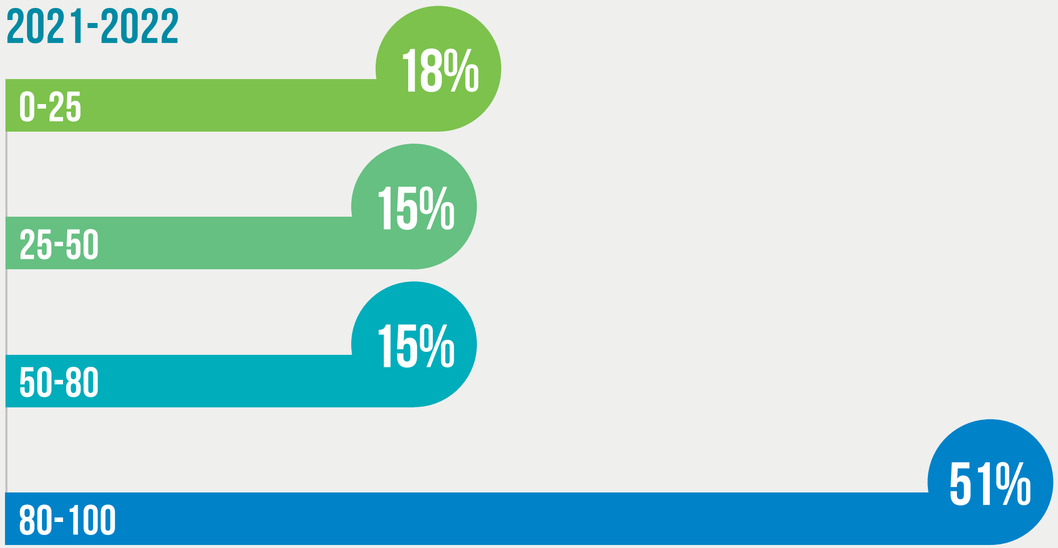
PARTNERSHIPS

LOCALISATION THERMOMETER

Localisation is on the rise! This is very clear when we compare this years' numbers with last years.

Of the activities with overseas-based NGOs/agencies what proportion of that activity is performed with local NGOs?

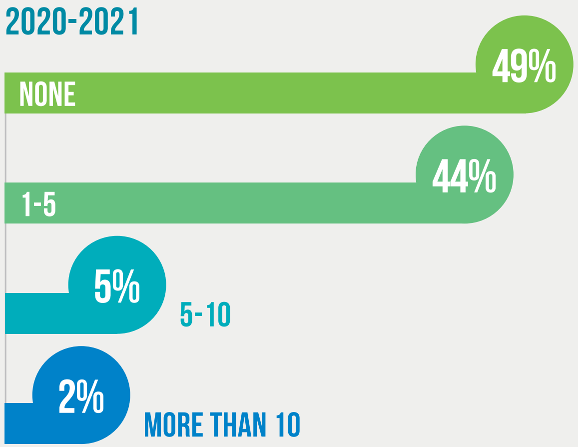


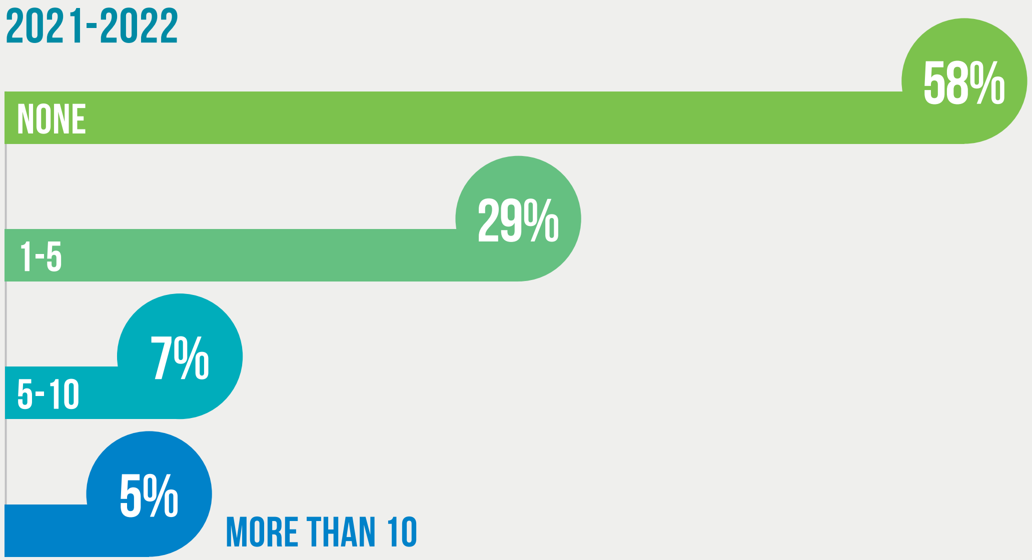


TYPES OF PARTNERSHIPS WITH NZ NGOS

There are changes here, particularly in the "none" category. This could be due to the increase in local partnerships overseas.

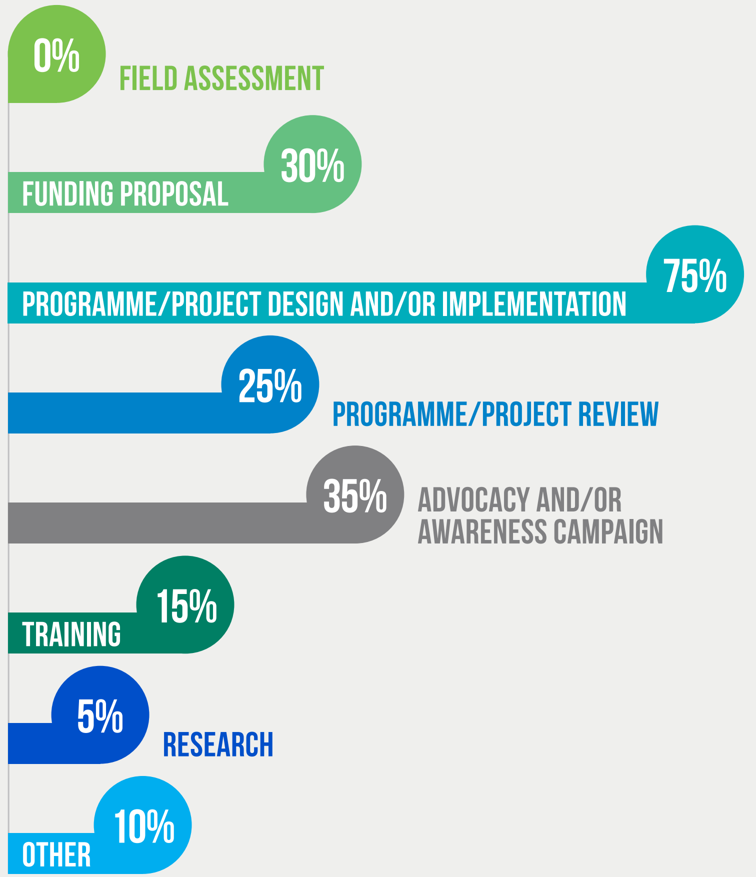
During the period, how many overseas development projects and initiatives (including advocacy campaigns, research, assessment etc.) has your organisation set-up and/or undertaken with another New Zealand-based NGO?



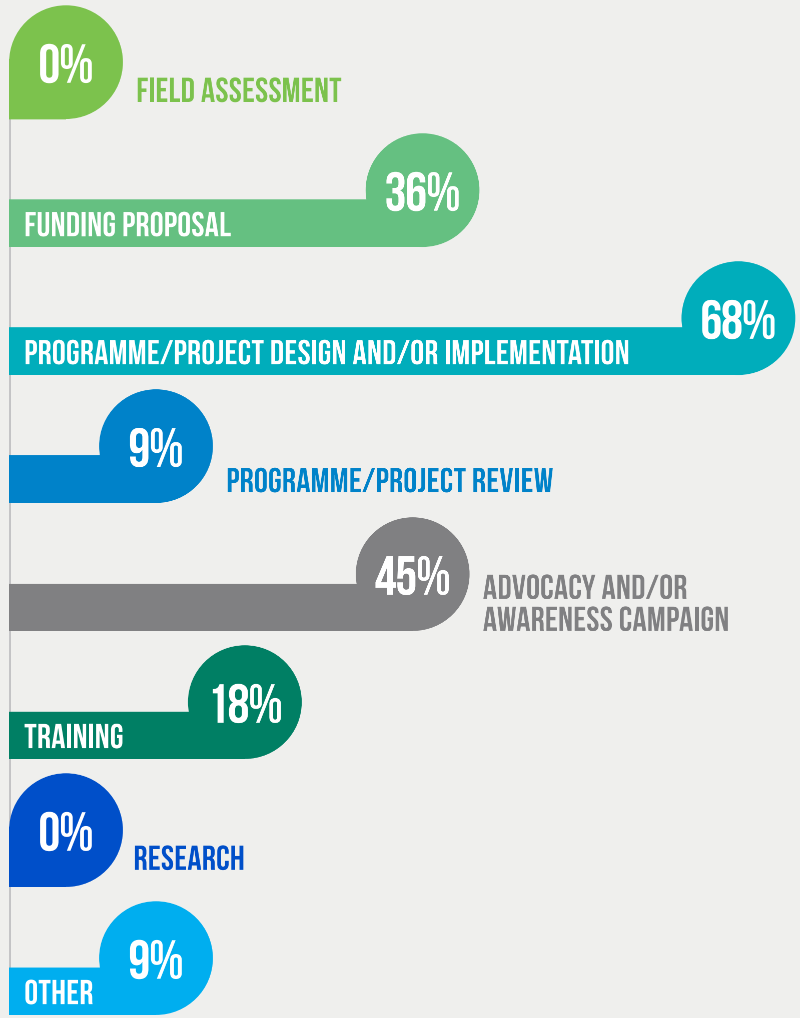


TYPE OF NEW ZEALAND-BASED NGO PARTNERSHIPS

2020-2021



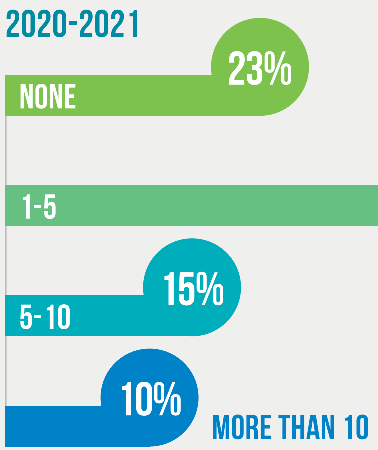
2021-2022

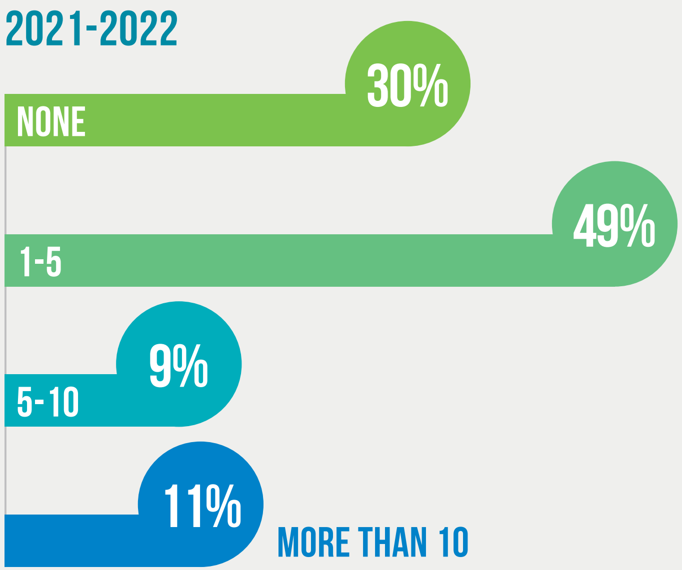


NUMBER OF INITIATIVES WITH AND OVERSEAS NGO

The changes in this area not too drastic – in that we're seeing more localisation efforts, which is most likely where these overseas-based partnerships have moved.

During the past year, how many overseas development projects and initiatives (including advocacy campaigns, research, assessment etc.) has your organisation set-up and/or undertaken with another overseas based NGOs/agencies?

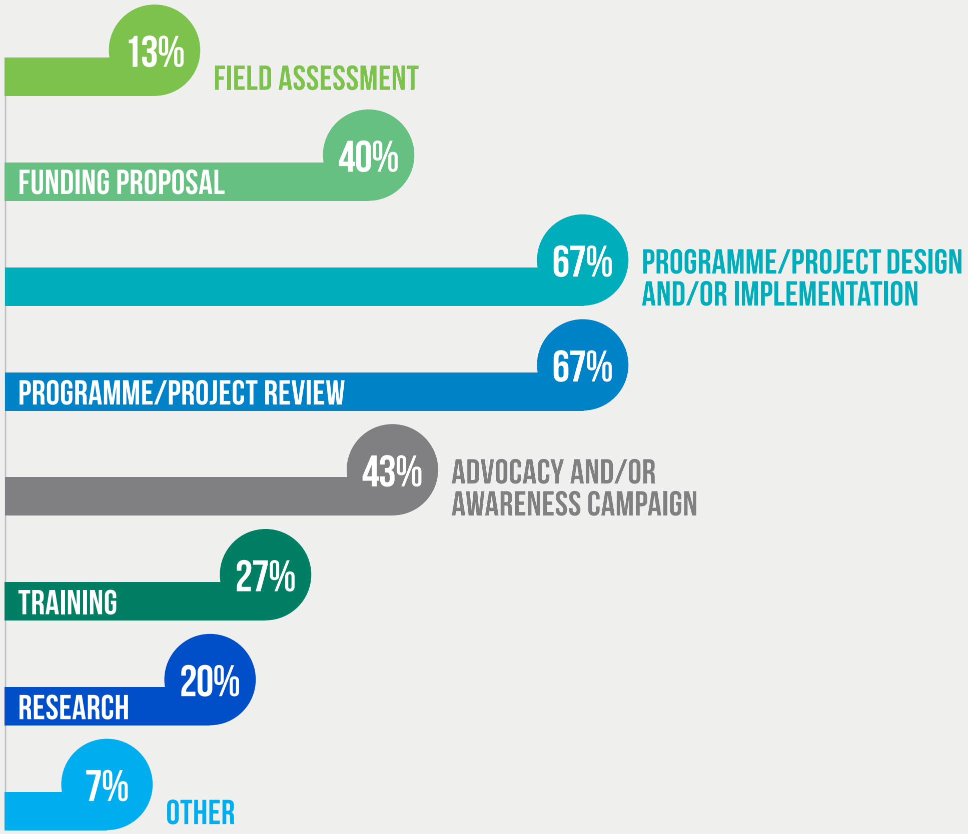




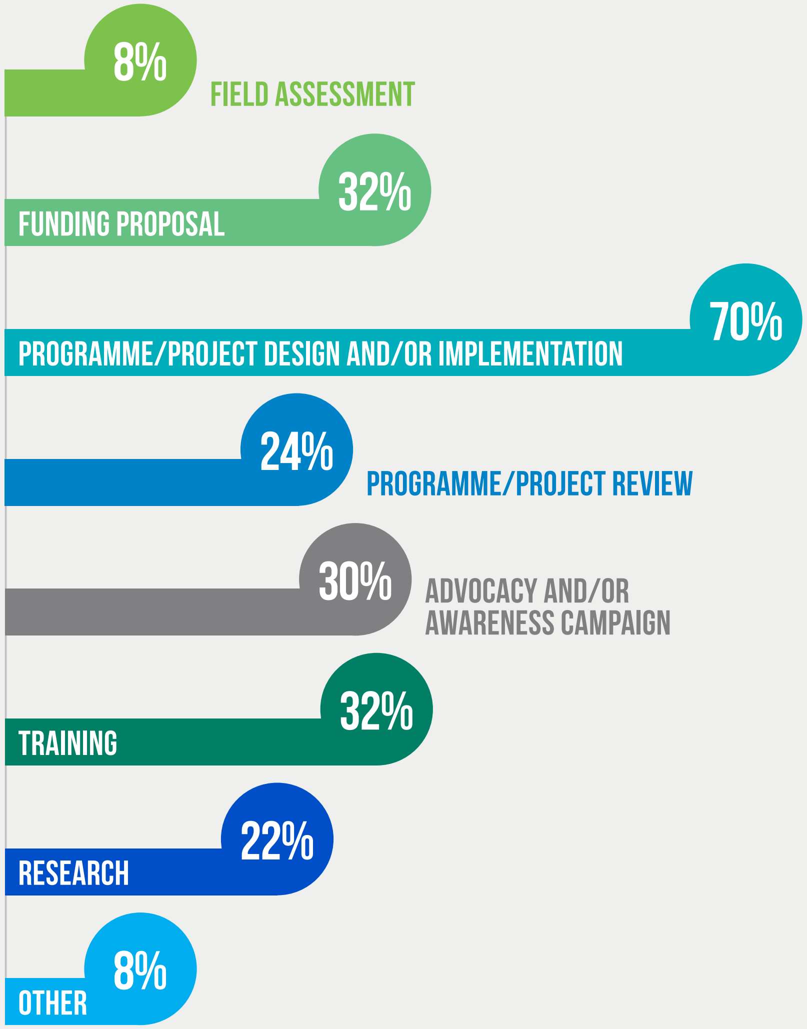
TYPES OF IN-COUNTRY PARTNERSHIPS

The most notable change here is in the Programme/Project review. There is anecdotal evidence to support the decrease in this area being attributed to our ability to travel again, and undertake reviews "in-house", where this was almost impossible in 2020-2021. We will monitor this in the next survey to see if this becomes a trend.

2020-2021



2021-2022

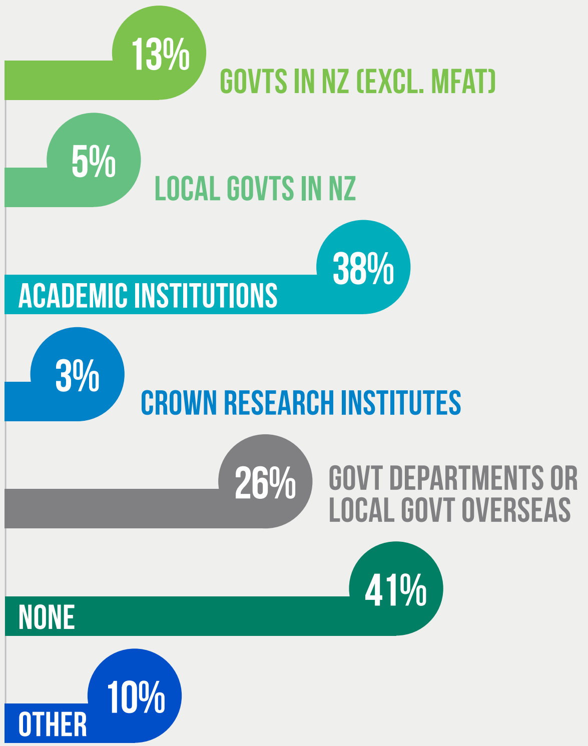


PUBLIC SECTOR PARTNERSHIPS IN NZ AND OVERSEAS

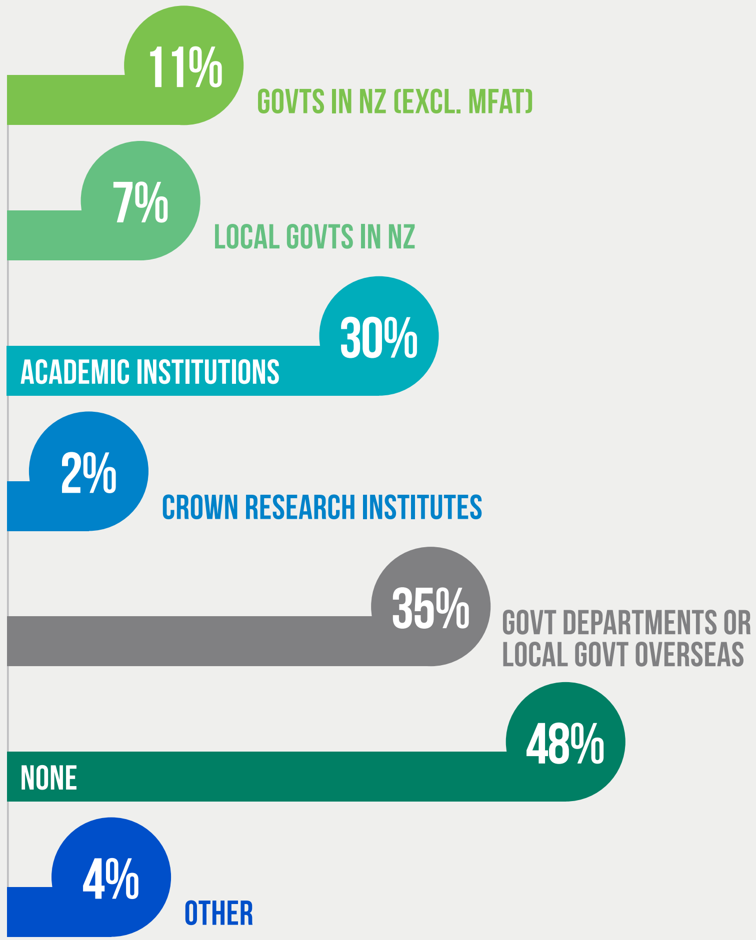
It's positive to see working with government departments or local government overseas increasing, a testament to localisation efforts.

During the period, did your organisation partner or work with any of the following NZ or overseas public sector entities?

2020-2021



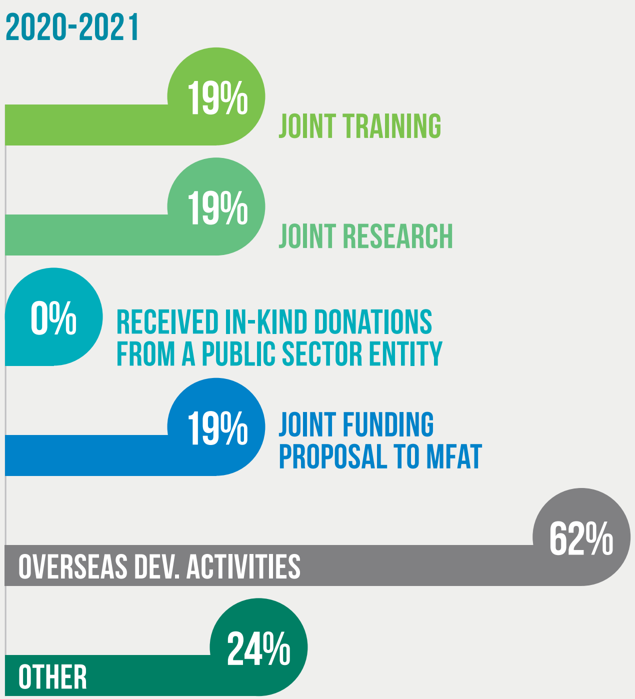
2021-2022

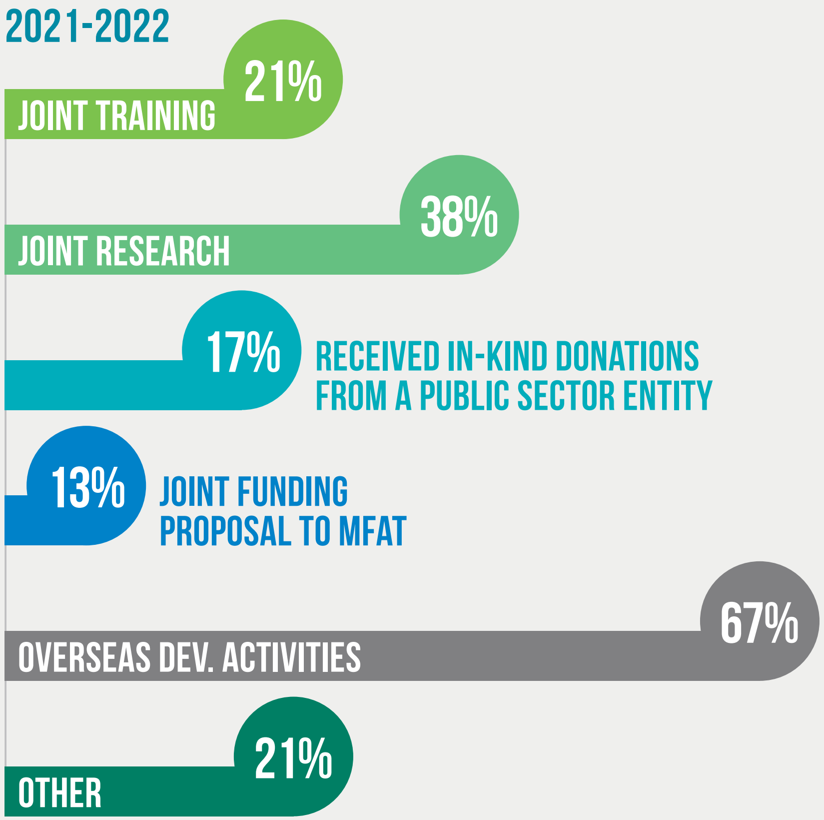


TYPES OF PARTNERSHIPS WITH PUBLIC SECTOR

No huge change here apart from the obvious in-kind donations being 0% last year which could be due to border closures or reporting anomalies, and a big increase in joint research, which is always positive.

What was the purpose of these partnerships with public sector entities?

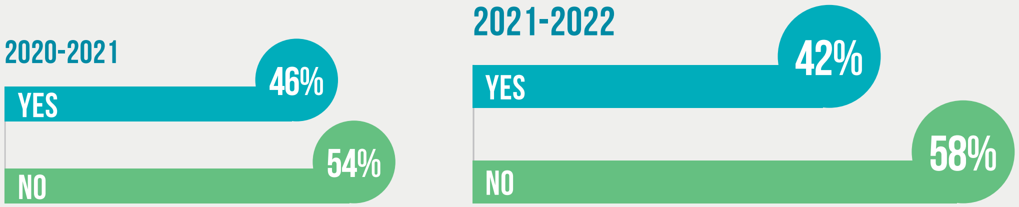




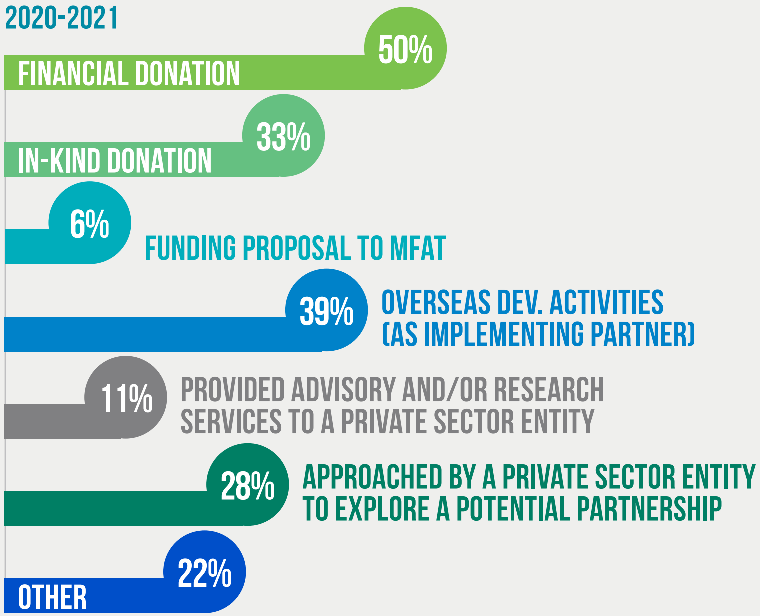
TYPES OF PARTNERSHIPS WITH PRIVATE SECTOR

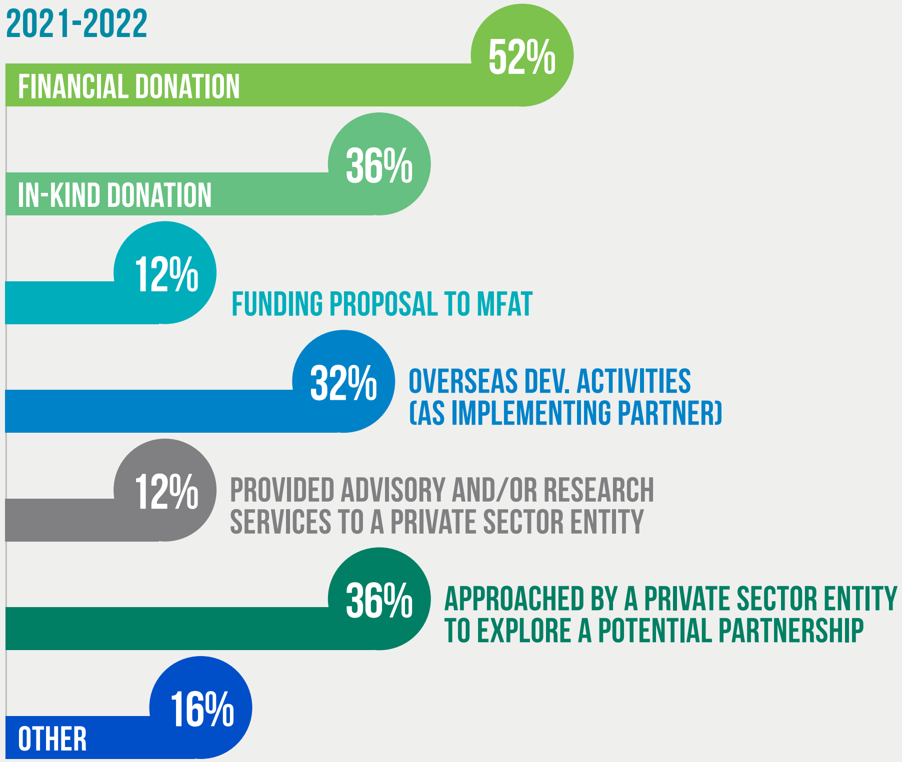
The numbers here remain relatively similar, aside from a jump in "approached by a private sector entity to explore a potential partnership". While we don't necessarily know what these potential partnerships may be, we see this as a positive sign.

During the period, did you partner with the private sector (either in New Zealand or overseas)?



If so, what was the purpose of these partnerships.





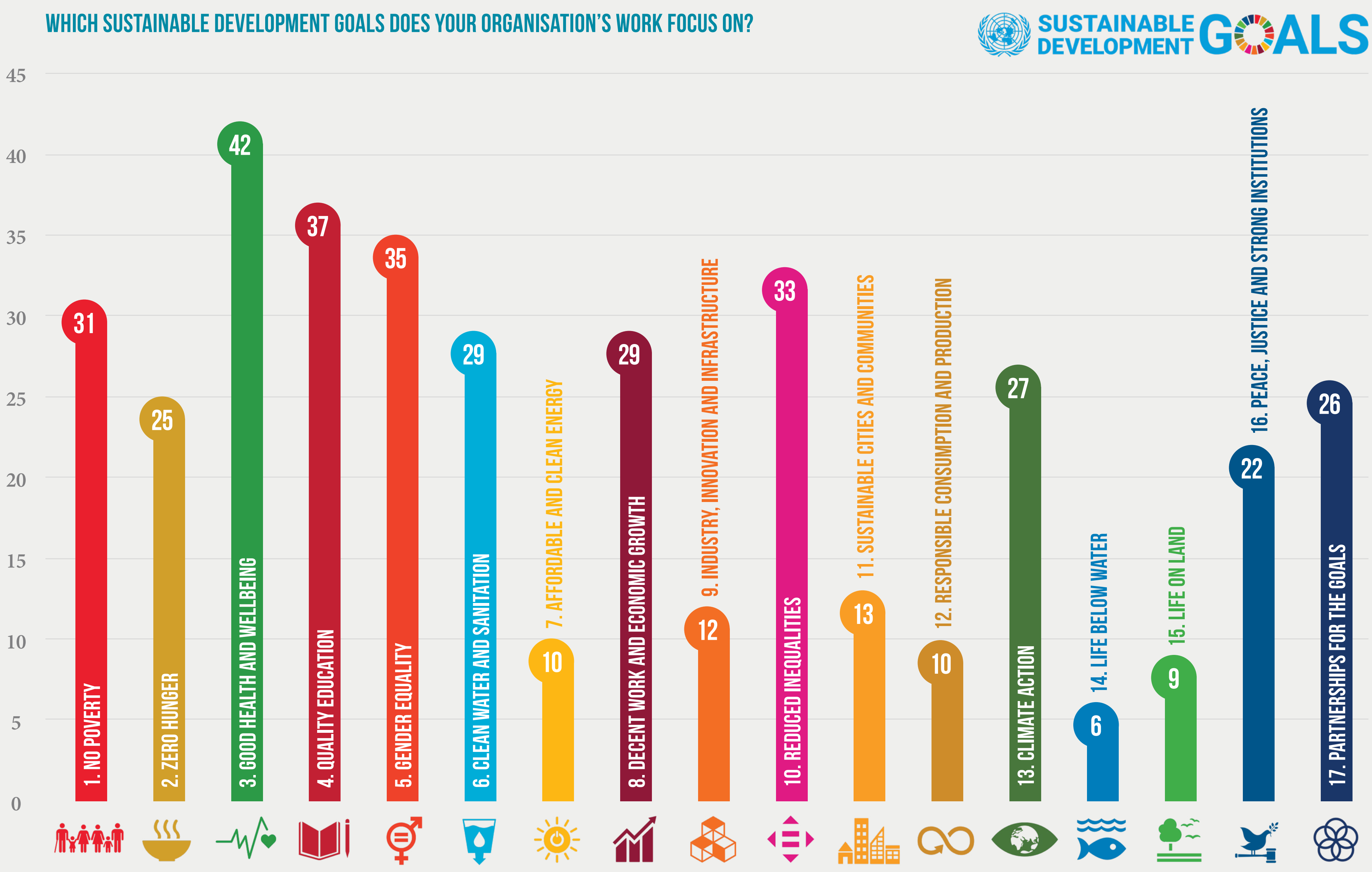
SUSTAINABLE DEVELOPMENT GOALS

The recent United Nations Sustainable Development Goals Report 2022 has painted a bleak picture of the reality of the Goals' achievement by 2030, going so far as to say that "cascading and interlinked crises are putting the 2030 Agenda for Sustainable Development in grave danger, along with humanity's very own survival".[1] CID is very happy to see that considering this, the sector in New Zealand is working in every SDG area and is engaging in activities to respond to them. We hope to include more questions on SDGs in next years' survey to track the progress of collective efforts. Listen to our podcast episode which explores how some of our members are responding to these 'cascading crises'.

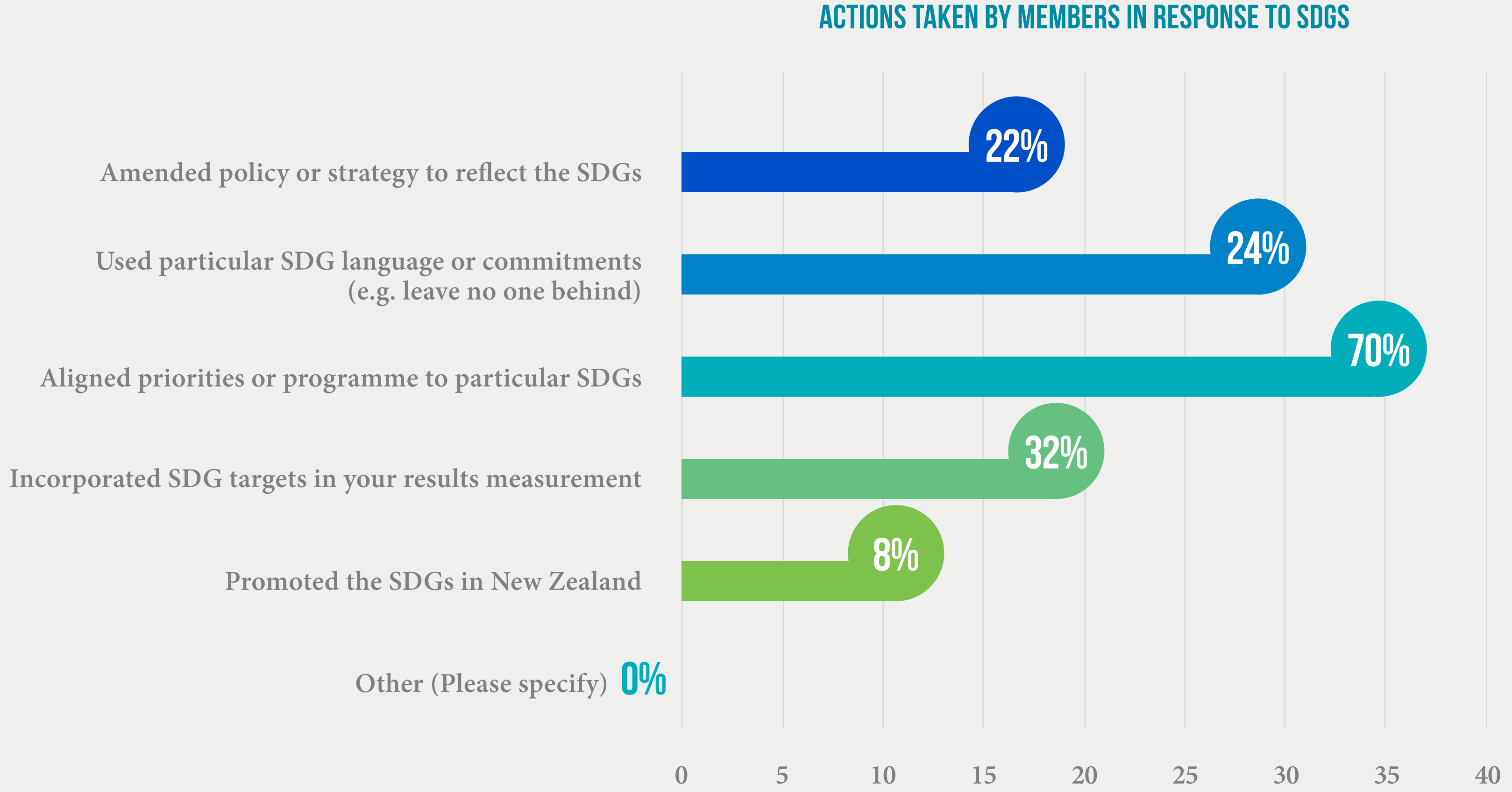
We are intrigued that as sustainable development is part of our DNA, that only 1 in 5 members include measurement of the SDG within their work. We would have expected this to have been much higher, if not 100%. We are exploring how we can support members to build capacity with regard to incorporating SDG into the monitoring and evaluation through training – please get in touch with us to let us know how what would be most useful.

CID is currently working on a mapping project for our website thanks to the generous sponsorship of Osky. The map will be interactive, and include where our members are working, as well as what SDGs they are working on. We hope this will be able to bring about richer collaboration across the sector, government and private sector, as we all work to achieve the sustainable development agenda.

[1]United Nations, *The Sustainable Development Goals Report 2022*. Available at https://unstats.un.org/sdgs/report/2022/ (Accessed 26/08/2022).


WHICH SUSTAINABLE DEVELOPMENT GOALS DOES YOUR ORGANISATION'S WORK FOCUS ON?
SUSTAINABLE DEVELOPMENT GOALS
45
40
35
30
25
20
15
10
5
0
31
1. NO POVERTY
25
2. ZERO HUNGER
42
3. GOOD HEALTH AND WELLBEING
37
4. QUALITY EDUCATION
35
5. GENDER EQUALITY
29
6. CLEAN WATER AND SANITATION
10
7. AFFORDABLE AND CLEAN ENERGY
29
8. DECENT WORK AND ECONOMIC GROWTH
12
9. INDUSTRY, INNOVATION AND INFRASTRUCTURE
33
10. REDUCED INEQUALITIES
13
11. SUSTAINABLE CITIES AND COMMUNITIES
10
12. RESPONSIBLE CONSUMPTION AND PRODUCTION
27
13. CLIMATE ACTION
6
14. LIFE BELOW WATER
9
15. LIFE ON LAND
22
16. PEACE, JUSTICE AND STRONG INSTITUTIONS
26
17. PARTNERSHIPS FOR THE GOALS

WHICH OF THE FOLLOWING HAS YOUR ORGANISATION UNDERTAKEN IN RESPONSE TO THE SGDS?



CONCLUSION

The 2021-2022 survey has provided useful insights into the state of the sector. There are many positive outcomes illustrated in this report – notably the significant increase in development expenditure and localisation partnerships. We hope these trends continue. However, these positives are offset by what appears to be decreasing confidence around funding. In the future, we want to see an increase in diversity in our workforce and those tasked with governance.

We are always looking for ways to improve best practice across the sector and within our own mahi. We have posed some questions throughout the report that we would love to hear your thoughts on.

We have learned a lot carrying out the survey this year and acknowledge that members had challenges in completing it, so we will be improving the usability of it in 2023. Please get in touch with us if you have any feedback or suggestions you'd like to provide on the survey from this year, and ways to improve for next.

Thank you to all those that participated in the survey this year. This is a great tool for learning about each other and our sector, and therefore improving our collective impact.

He aha te mea nui o te ao? He tangata, he tangata, he tangata!

What is the most important thing in the world? It is the people, it is the people, it is the people!

COUNCIL for INTERNATIONAL DEVELOPMENT

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