



COUNCIL *for*
**INTERNATIONAL
DEVELOPMENT**
Aotearoa, New Zealand

2022-2023

MEMBER & SECTOR SURVEY REPORT

www.cid.org.nz



WHO WE ARE

The Council for International Development Aotearoa New Zealand (CID) is the peak body and umbrella organisation for New Zealand organisations working in international development and humanitarian aid. CID represents around 90 organisations ranging from large international NGOs, community-based organisations, businesses, academic institutions, research organisations, consultants and social enterprises.

CID is governed by a Board made up of key member organisations and co-opted board members. Our mission is to; connect and strengthen the CID member network, to drive best practice and professional standards, to promote learning and innovation, and to engage and influence policy makers, local leaders and civil society.

We work with multi-lateral organisations, overseas governments and other development actors. CID has a long-standing partnership with the New Zealand Ministry of Foreign Affairs & Trade (MFAT).

WHAT IS THE CID SURVEY FOR?

CID's annual membership survey of the international development and humanitarian aid sector is the only survey of its kind for Aotearoa New Zealand and captures valuable data and detailed insight into the world CID's international NGO members operate.

This data is shared with key agencies including Statistics New Zealand and the Ministry of Foreign Affairs & Trade (MFAT). MFAT use the survey report to help guide and shape their delivery models and engagement with the international development sector.

CID also relies on this data to determine annual membership fees and help guide our work programmes with members and stakeholders.





METHODOLOGY

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

This year's CID Membership Survey expanded the data being compared from the normal, 3 years, out to 8 years (excluding 2019*), in order to provide more insight into trends over the 2015 to 2023 period.

* Note, the survey was not delivered for the 2019 financial year due to the Covid-19 pandemic.

Please note, figures are rounded to the nearest whole percentage which may result in some variation in totals on some graphs.

The CID Membership Survey covered data from members generated during the financial year 1 July 2022 to 30 June 2023 with participation by 58 members. All members were given the opportunity to provide feedback in key thematic areas: size, scope, finances, and priorities; satisfaction with MFAT partnerships as well as views on future direction.

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.

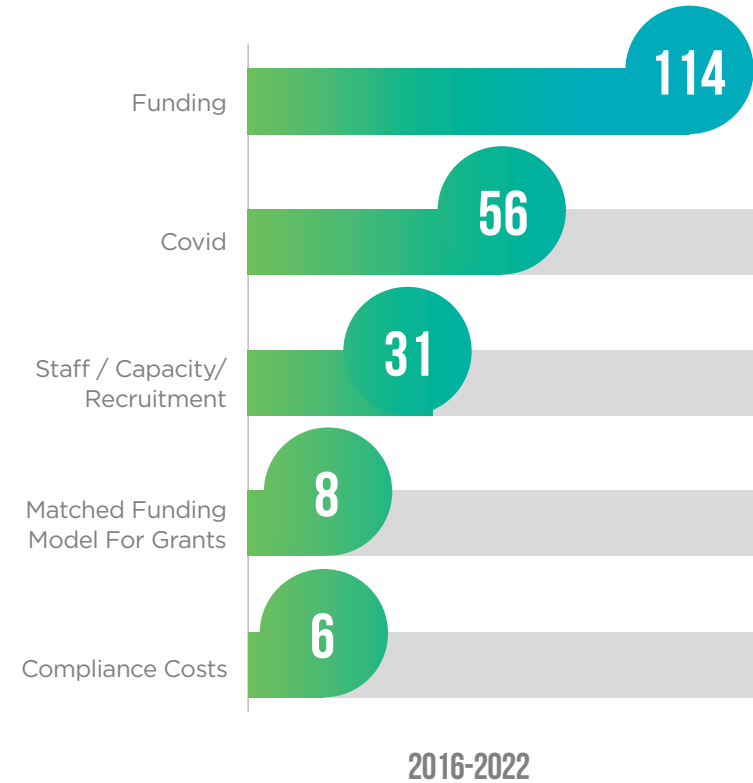
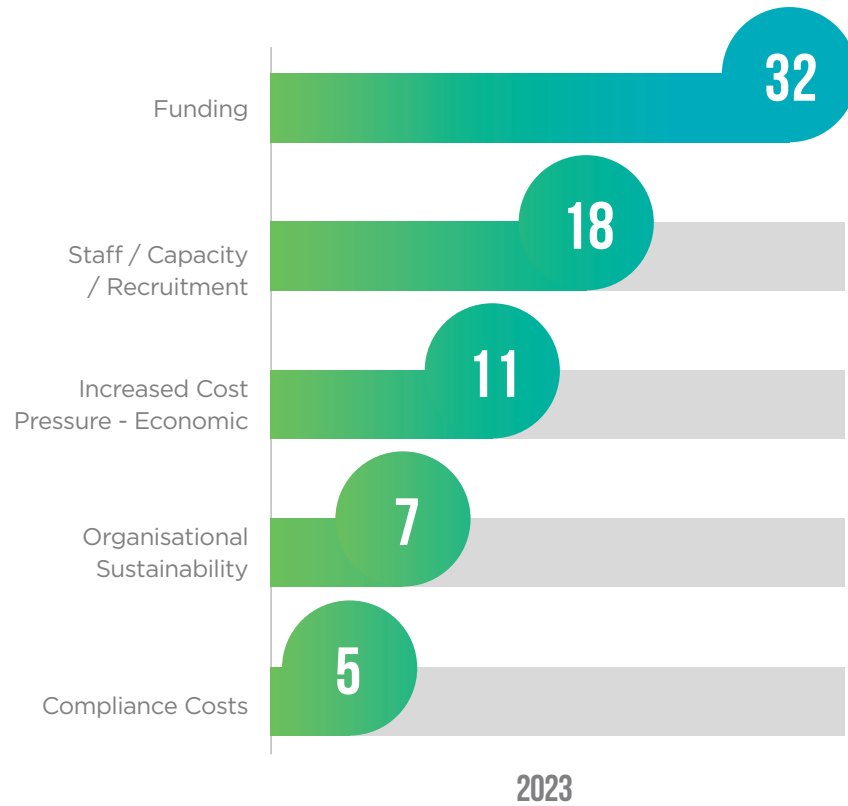


Photographer: Justin Purser.

Gilberto Martinez and his neighbour Marcial Aquino load sugar cane onto Gilberto's bullocks (who are named Chuco and Chile). Gilberto and Marcial are members of the Manduvira cooperative. Manduvira is able to retain maximum value for its members through owning a processing plant and selling organic golden sugar to fair trade buyers like Trade Aid.



MOST PRESSING ISSUES

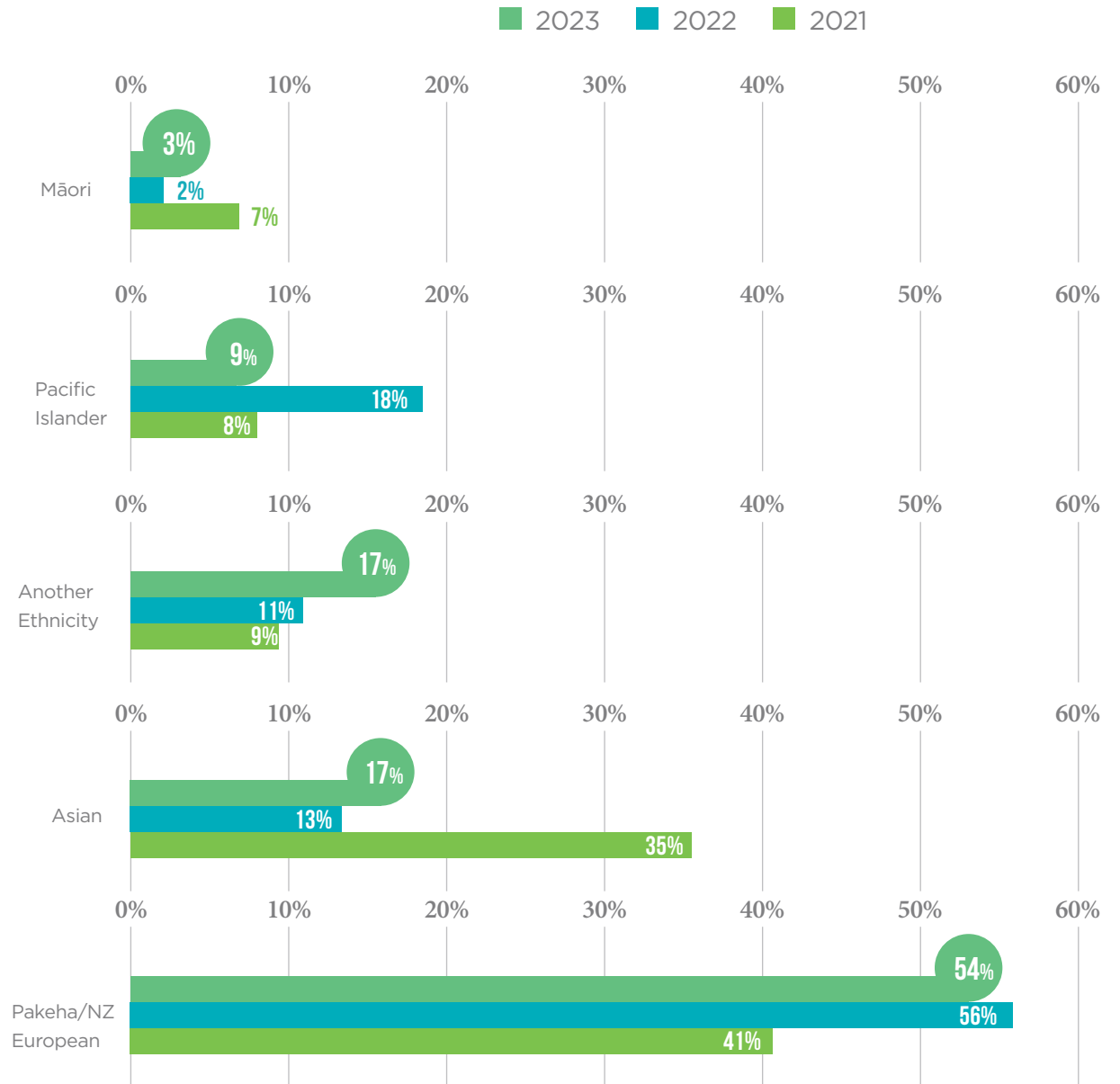
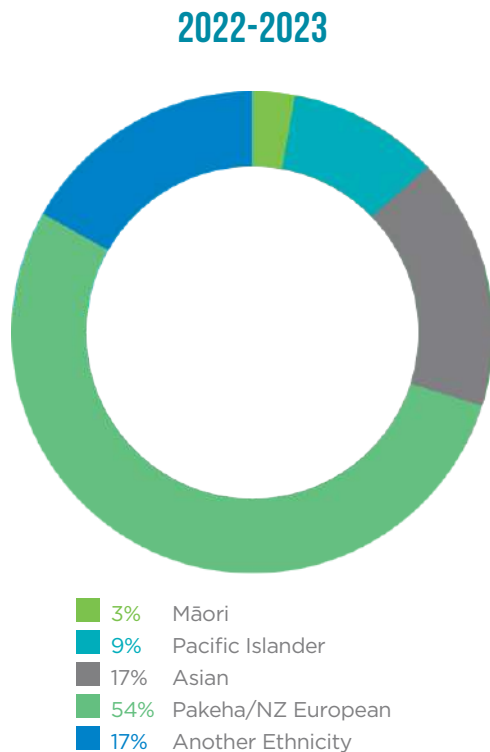


Members identified consistent areas of concern around funding, staffing and costs from 2016-2023. Further, the unexpected cost increases brought on by the Covid-19 pandemic has also created a more challenging operating environment.



WORKFORCE PROFILE

The sector appears to show a decrease in ethnic diversity over the last three years. This could be due to the small number of non- Pakeha/NZ European represented, the difficulty of attracting Māori and Pasifika into the sector, and the possibility that more ethnic groups are being encouraged and supported to work in their home countries.





WORKFORCE PROFILE

GENDER REPRESENTATION IN AOTEAROA-BASED WORKFORCE



Gender diversity across the sector has remained constant over the period through which data is available.

The predominance of female staff across most roles, including leadership, has remained consistent, apart from governance roles which remain male dominated.



GENDER MAKE UP IN SENIOR LEADERSHIP ROLES



GENDER MAKE UP IN GOVERNANCE ROLES





AOTEAROA BASED VOLUNTEERS AND STAFF



■ 49% Staff
■ 51% Volunteers

OVERSEAS BASED VOLUNTEERS AND STAFF



■ 52% Staff
■ 48% Volunteers

Volunteers continue to play an important role both in Aotearoa New Zealand and in programme countries. The value of this work adds considerably to the capacity and capabilities in the sector.

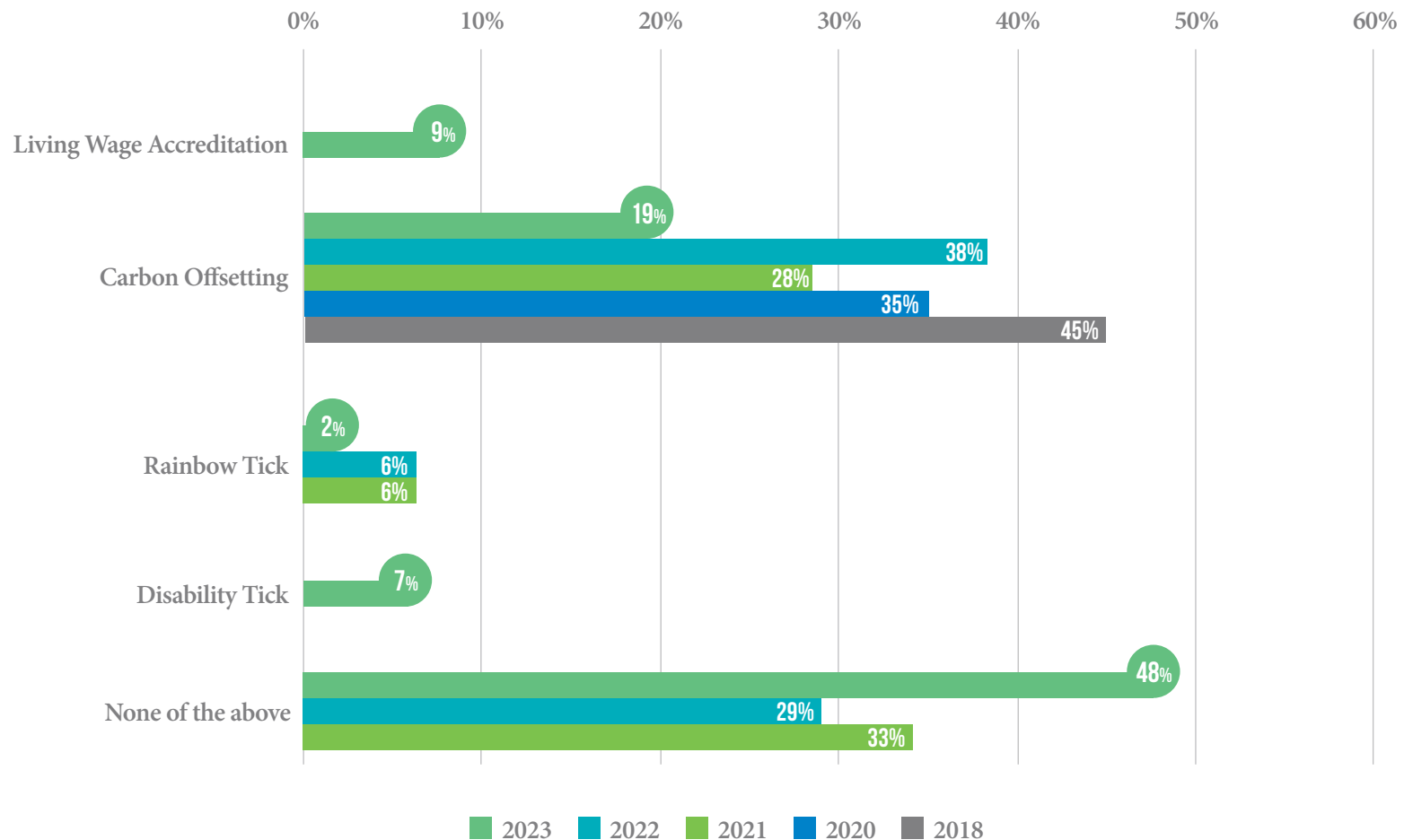
The number of overseas based volunteers has grown significantly since the 2022 CID membership survey which showed just 17% of the overseas workforce were volunteers. This growth is likely due to the resumption of overseas placements following the period of placement cessation due to Covid-19 restrictions.



SOCIAL GOOD MEASURES

The trend for reduced participation in Aotearoa New Zealand based 'social good' programmes has been evidenced across the sector.

Understanding the basis for this decline is an area we are keen to understand, alongside whether there are any implications on pay levels, diversity and environmental sustainability within member organisations.



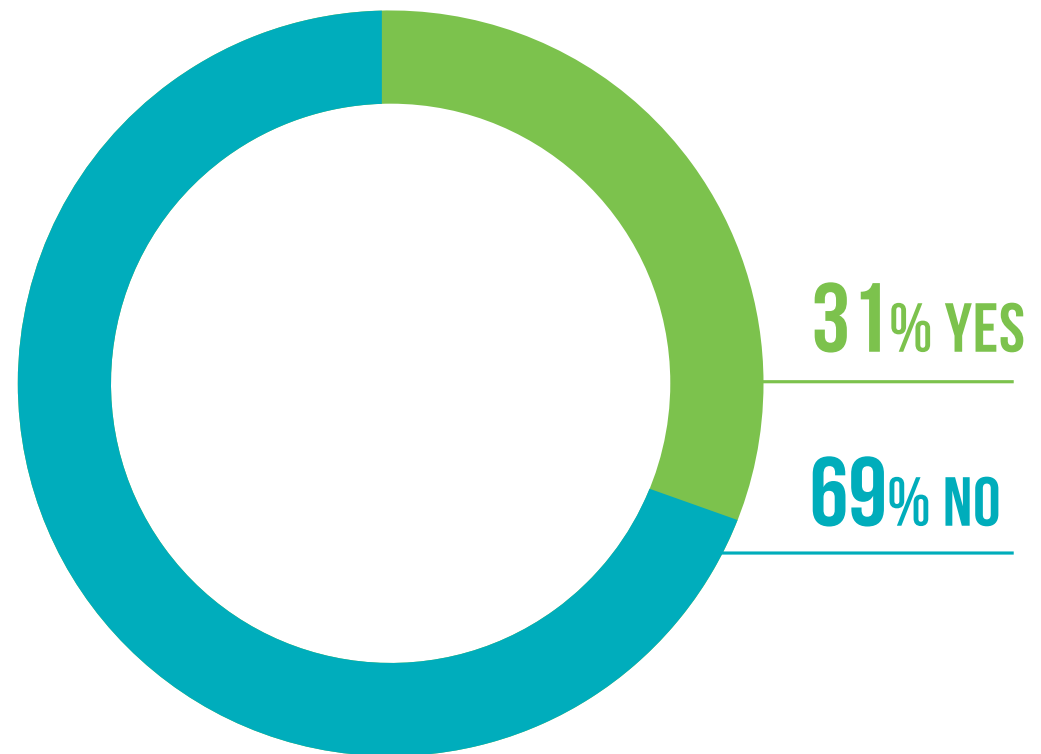


FAITH BASED ORGANISATIONS

The proportion of organisations that identify as faith-based has fallen slightly over the last year.

Of those member organisations who identify as faith-based, all identify as coming from a Christian faith basis.

IS YOUR ORGANISATION FAITH-BASED?





FINANCE DEVELOPMENT SPEND

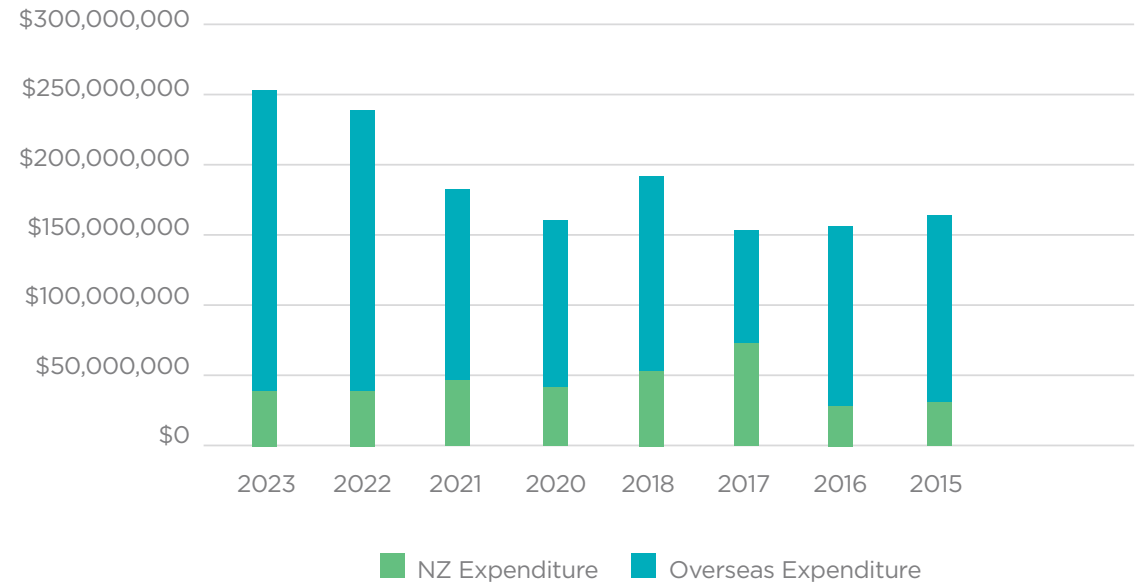
Development support from CID members, at \$253 million (NZD), was the highest it has been since the Survey began.

The increase over the last four years is 55%, demonstrating the sectors commitment to supporting increased development activity.

Whilst Covid-19 affected spend for 2020 and 2021, the sector has rebuilt its programme delivery support and surpassed previous levels of expenditure.



TOTAL DEVELOPMENT EXPENDITURE



2019 data not available due to Covid-19 pandemic.



TOTAL INCOME

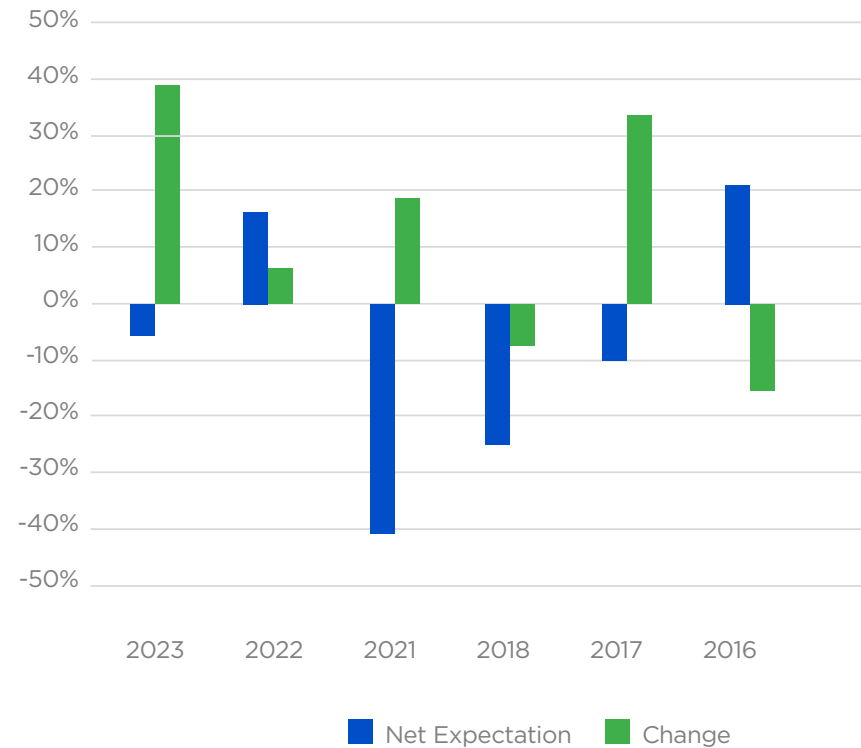
Alongside the increase in total development spend, the income of the sector has increased significantly to a record \$293 million (NZD).

In the last year, this increase was an impressive 39%, reflecting both an increased diversification of funding sources by members and an increased level of support from the public and government.

As depicted below, projecting what income is going to do is a difficult task. The graph shows the net sentiment amongst members on whether income will grow or fall and what actually happened.

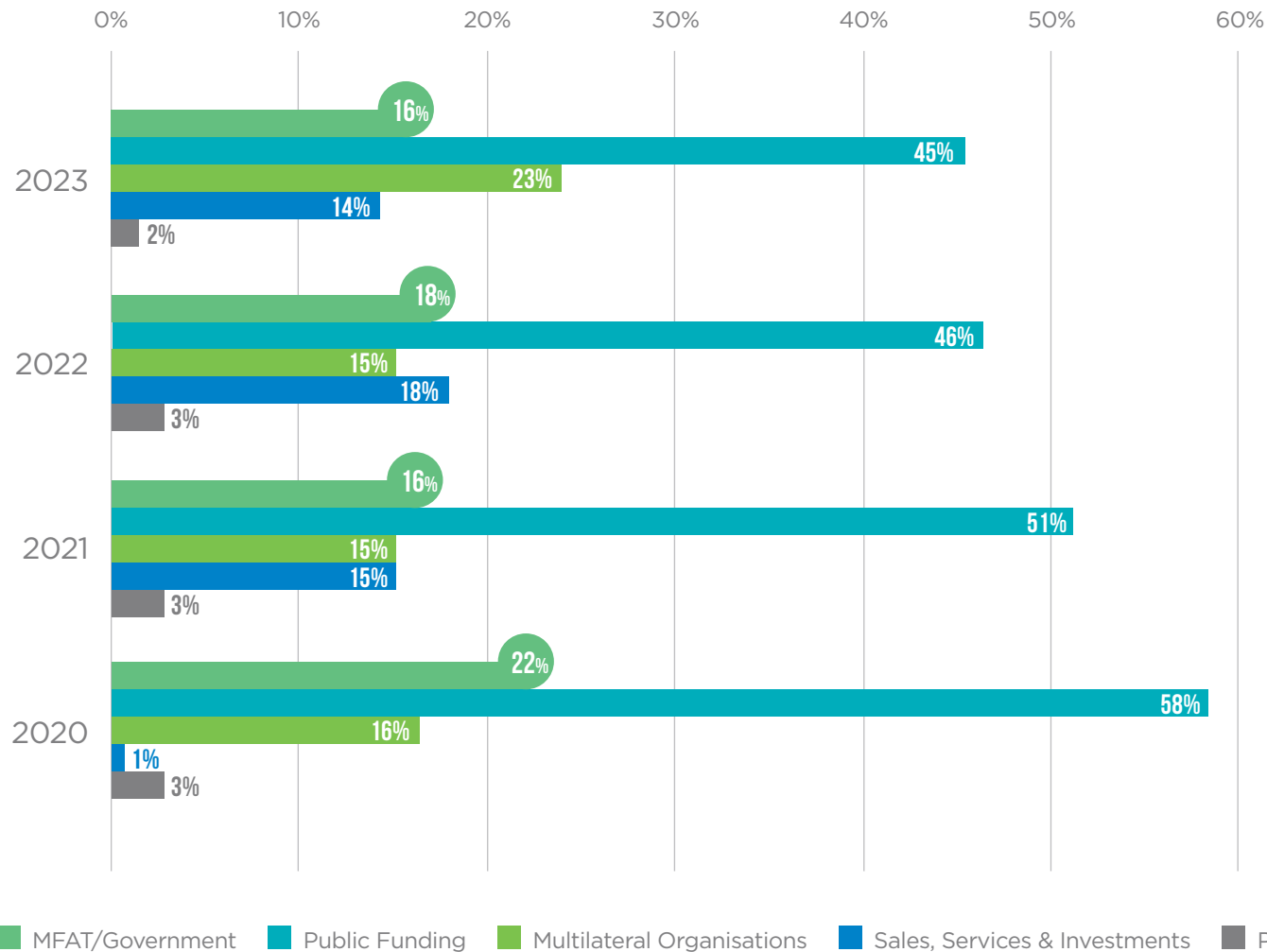


PROJECTED VS ACTUAL





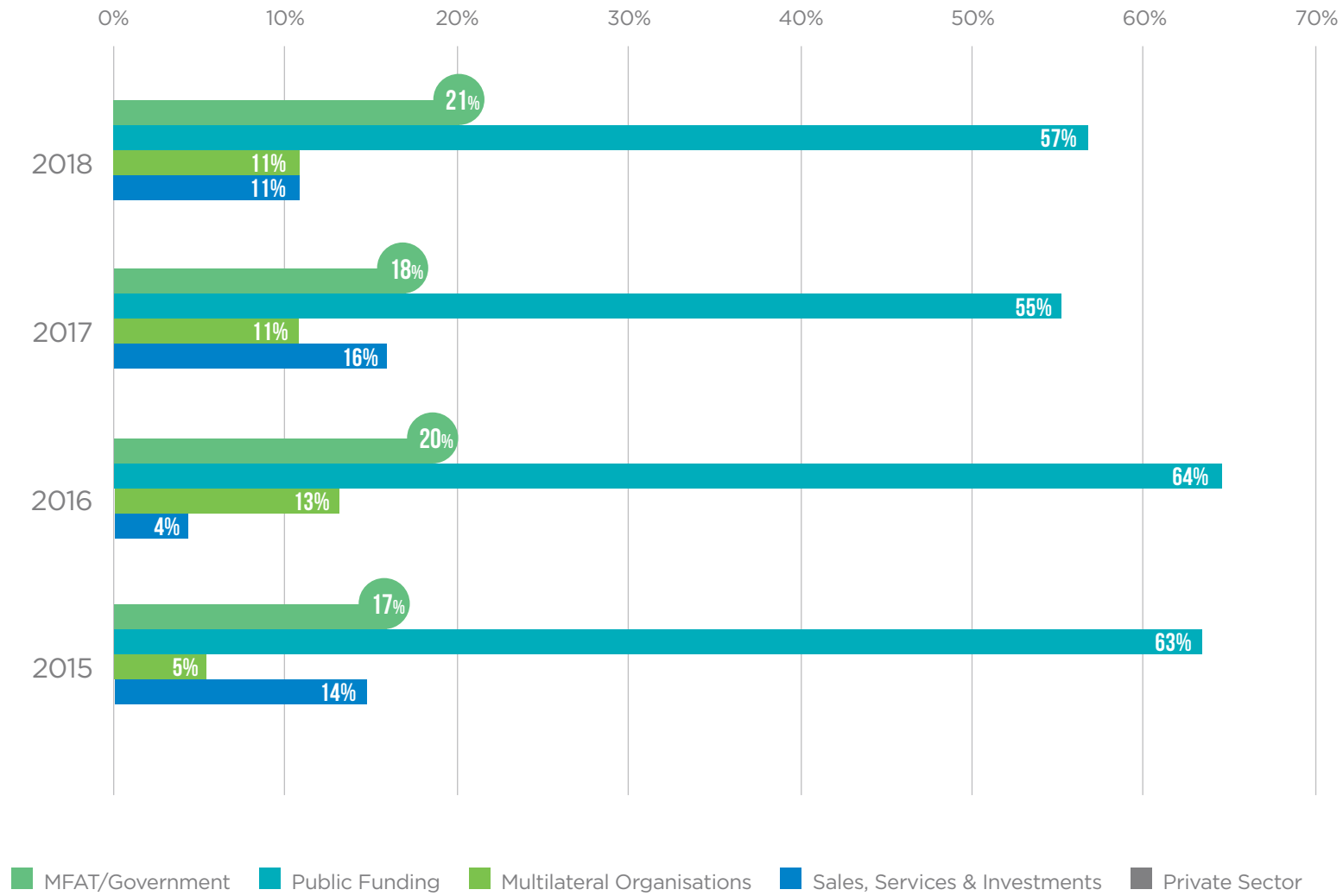
WHERE HAS THE FUNDING COME FROM?



Funding support from multilateral organisations has increased significantly in 2023. This funding was accessed by 6 of the 58 organisations that responded to the survey, with the average level of funding being slightly over \$2.2 million per organisation.

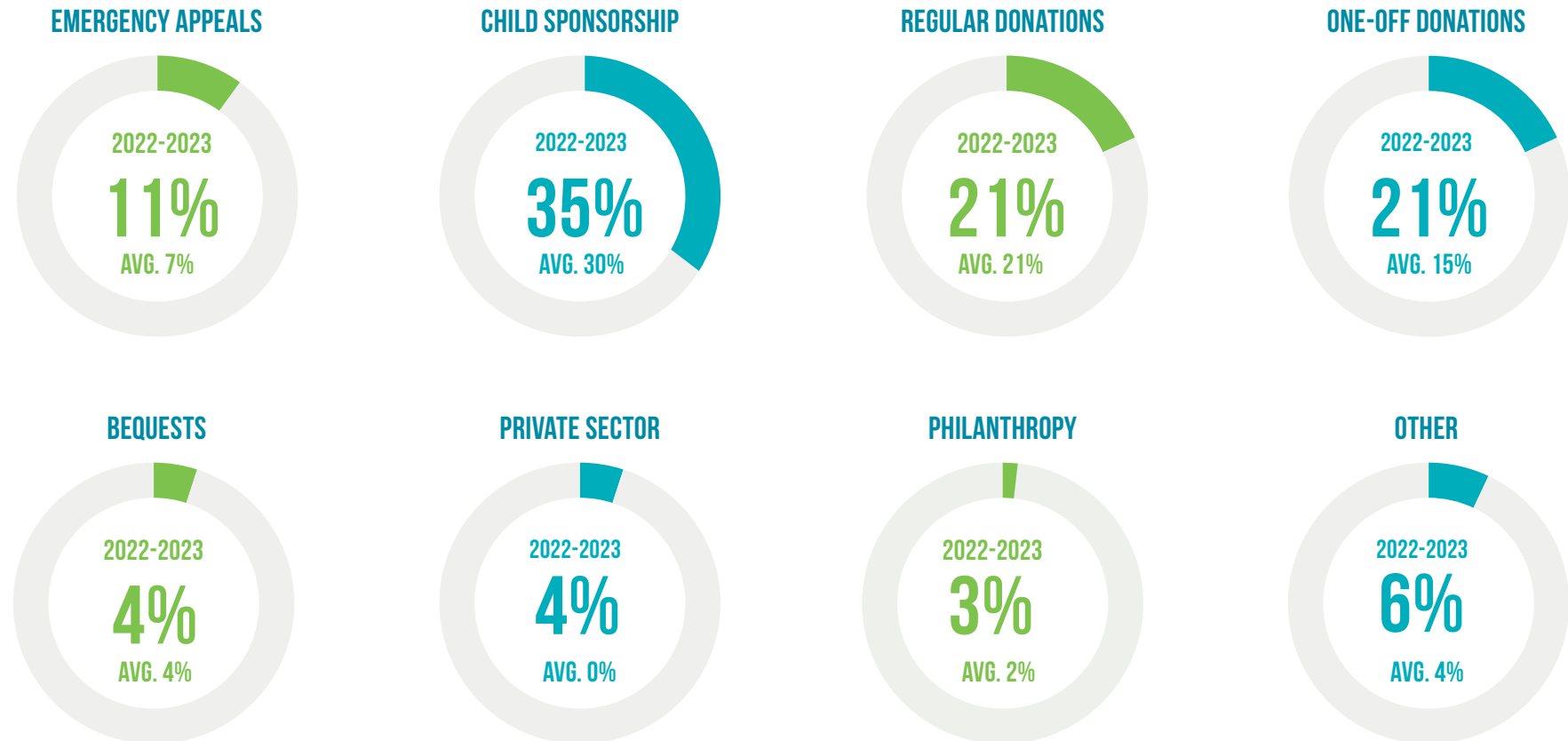
What is clear from the survey feedback is that smaller organisations are finding it harder to raise funds and diversify their income streams.

The following pages gives some encouragement. Public one-off donations, child sponsorship and emergency appeals all delivered higher than average proportions of funding within an increased public funding total.





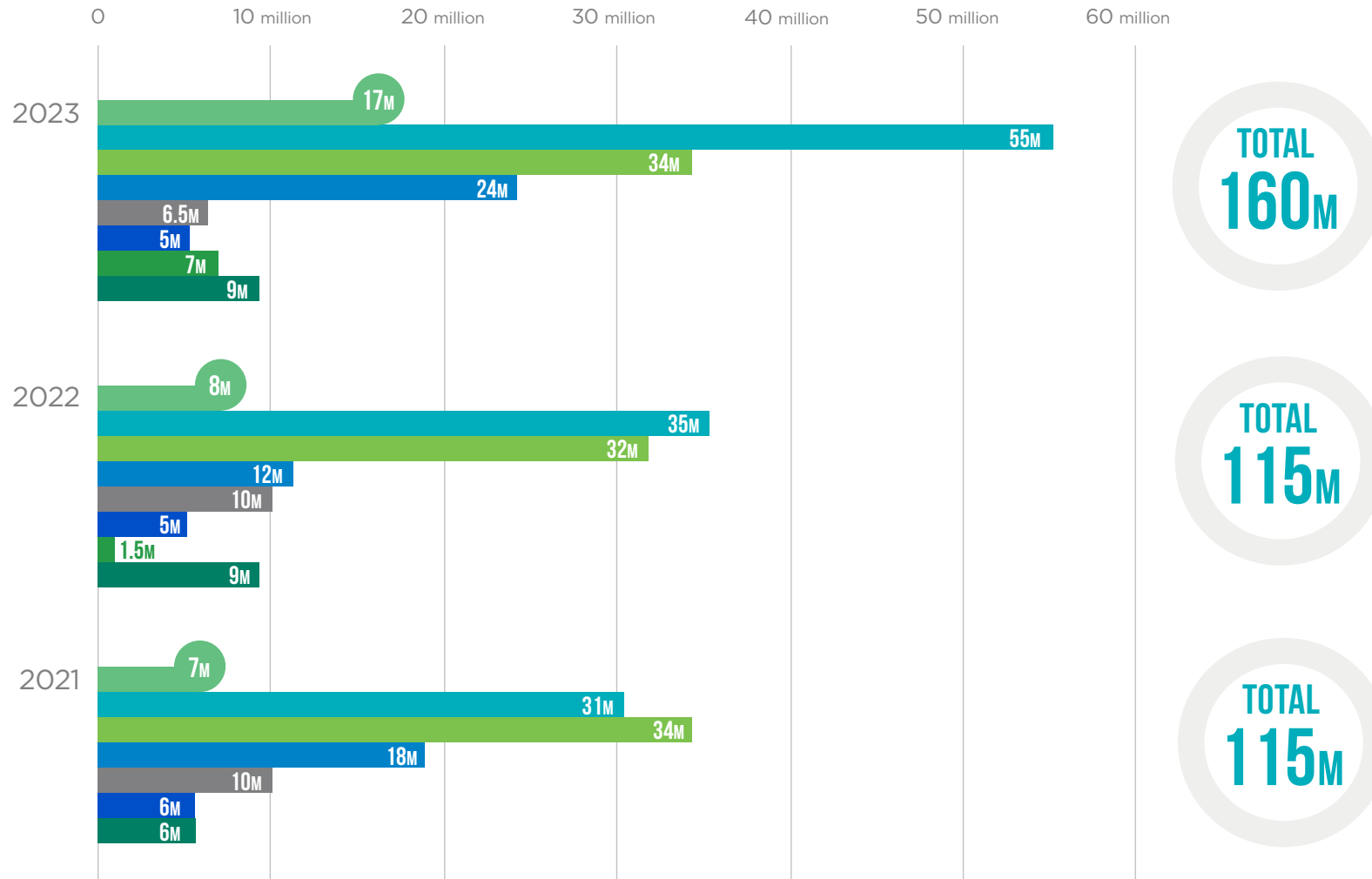
PROPORTION OF PUBLIC FUNDING BY TYPE



Note: Average figures are based on the historical data provided between 2016 and 2022.

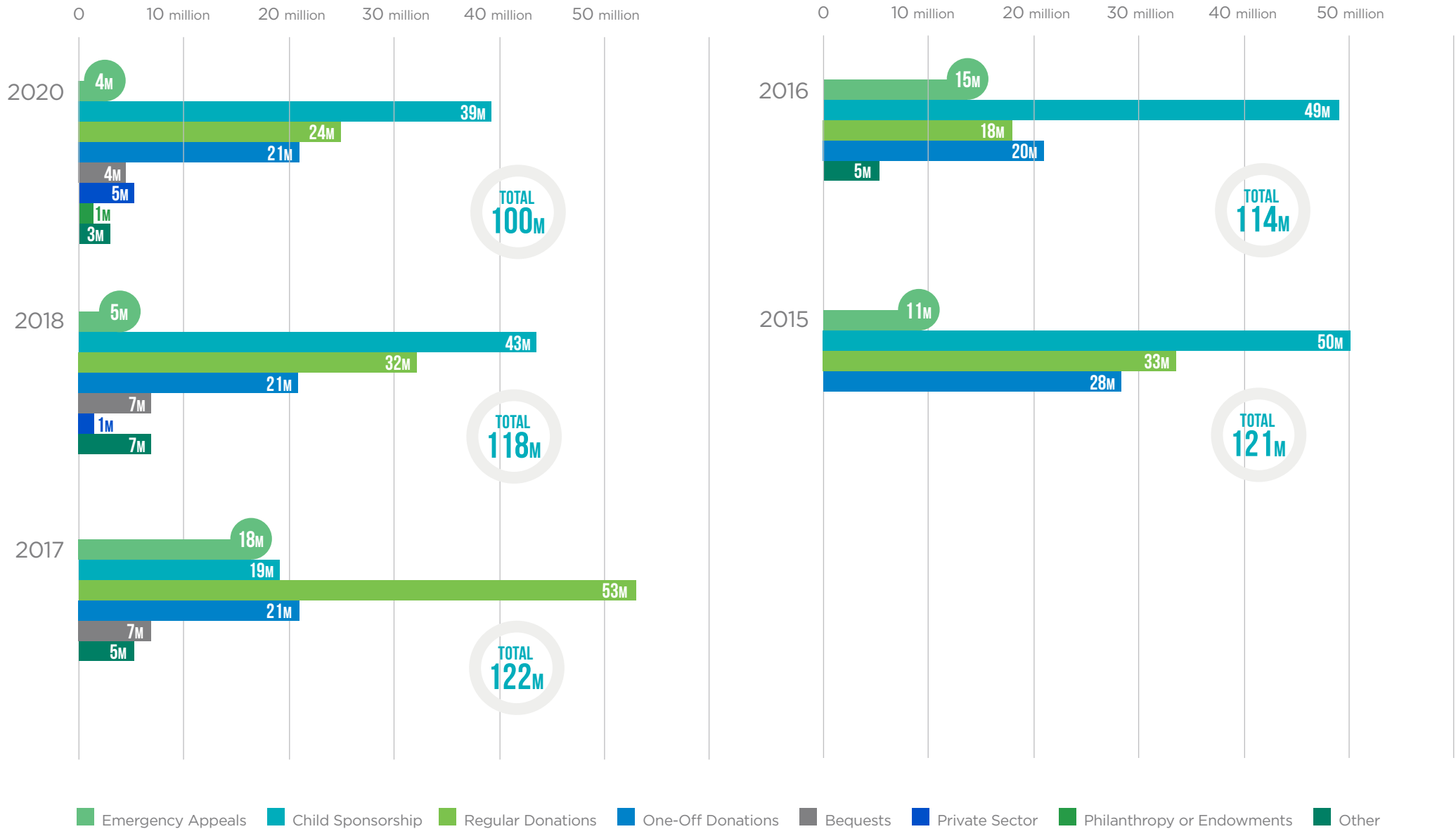


PROPORTION OF PUBLIC FUNDING BY TYPE



■ Emergency Appeals
 ■ Child Sponsorship
 ■ Regular Donations
 ■ One-Off Donations
 ■ Bequests
 ■ Private Sector
 ■ Philanthropy or Endowments
 ■ Other

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FUNDING RESERVES

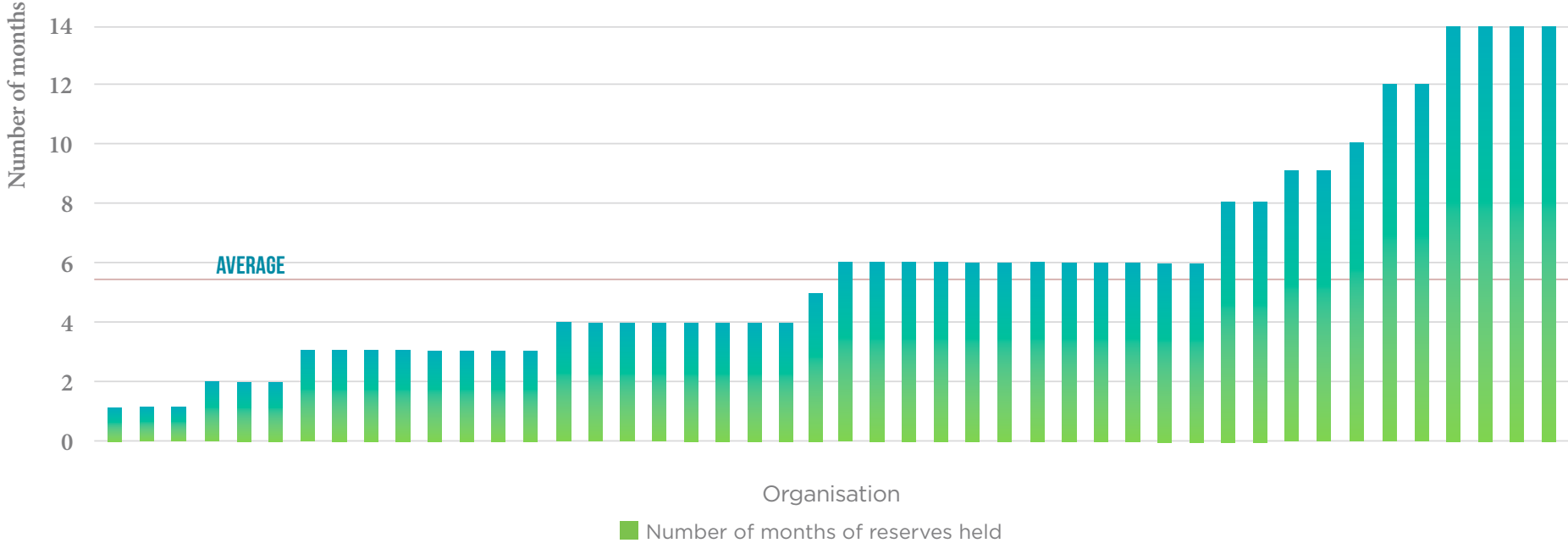
With the expressed challenges around organisational sustainability it is perhaps unsurprising to see the average level of reserves fall below 6 months, the historic average.

There were also a number of members who did not report their reserve levels and identified as being challenged around organisational sustainability.

Of those organisations with less than six months reserves, all but one have four months or less.

These findings present a concerning trend and further insight into these challenges would be beneficial.

NUMBER OF MONTHS RESERVES HELD

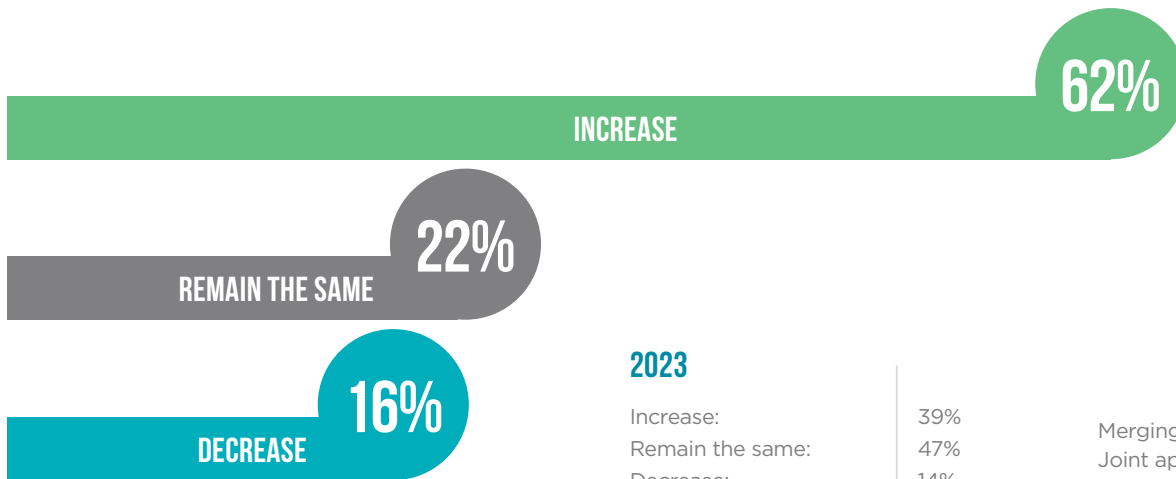




FINANCIAL EXPECTATIONS

Despite the challenges identified around funding and organisational sustainability, the sector remains bullish in its expectations on income. This sentiment around ongoing increases in funding is reinforced by a reduction in consideration of actions that would contain costs or deliver other changes designed to mitigate sustainability risks.

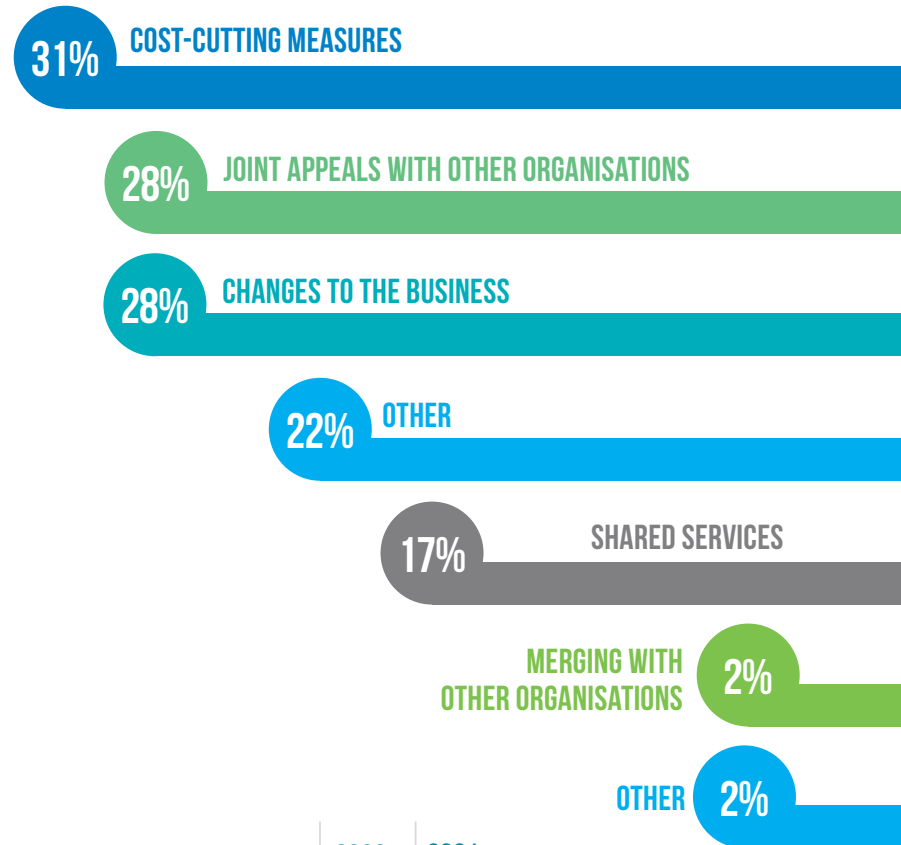
2024 INCOME EXPECTATIONS



2023

Increase: 39%
 Remain the same: 47%
 Decrease: 14%

IS YOUR ORGANISATION CONSIDERING ANY OF THE FOLLOWING?



Merging with other organisations
 Joint appeals with other organisations
 Changes to the business model
 Cost-cutting measures
 Shared services
 Other

2022 2021

22%
 43%
 51% 73%
 32% 50%
 43% 50%
 8% 8%



CHANGE IN TOP 10 COUNTRIES

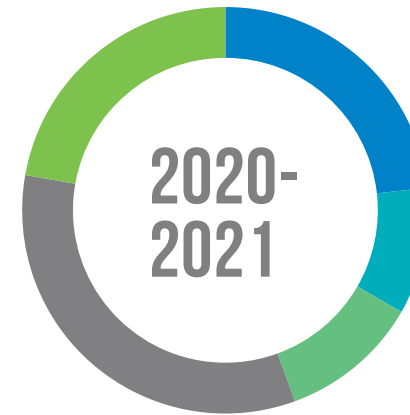
Africa was consistently the largest recipient of development funding from CID members through years 2020-2022, but falls to second biggest in 2022-2023 behind the Pacific.

Over the past four years, we have seen shifts in the regional focus of members, with the Americas seeing an increase in their share of funding over this period. Southeast Asia has become more of a focus in 2022-2023 - increasing to 20% - and the Middle East/Central Asia has become less of a focus this year, decreasing to 8%.

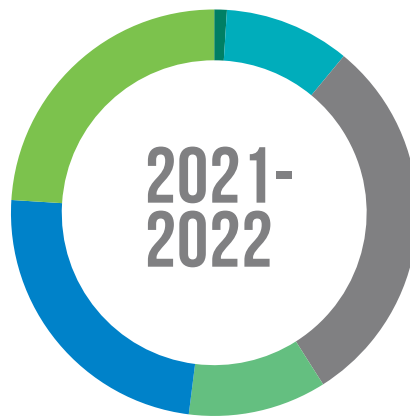
LOCATION OF SPEND



- 34% Africa
- 30% Pacific
- 26% Southeast Asia
- 8% Middle East/Central Asia
- 2% Americas



- 33% Africa
- 23% Middle East/Central Asia
- 22% Pacific
- 11% Southeast Asia
- 10% Americas



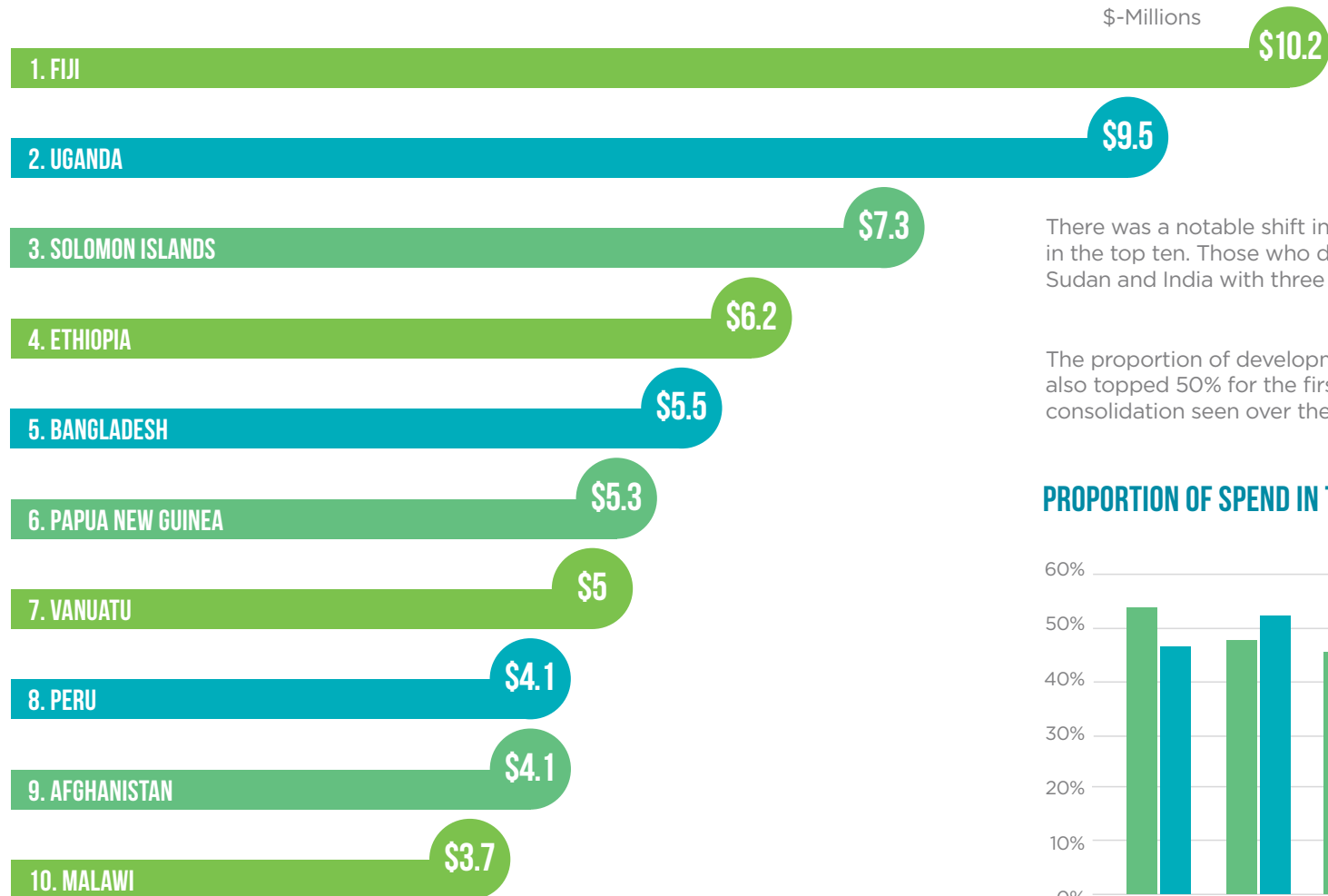
- 30% Africa
- 24% Pacific
- 24% Middle East/Central Asia
- 11% Southeast Asia
- 10% Americas
- 1% Europe



- 30% Pacific
- 28% Africa
- 20% Southeast Asia
- 12% Americas
- 8% Middle East/Central Asia
- 2% Europe



2022-2023 TOP 10 COUNTRIES FOR DEVELOPMENT SPEND



There was a notable shift in both rankings and countries included in the top ten. Those who dropped off included Lebanon, South Sudan and India with three newcomers Vanuatu, Peru and Malawi.

The proportion of development spend in the top ten countries also topped 50% for the first time, continuing the trend of consolidation seen over the last few years.

PROPORTION OF SPEND IN TOP 10 COUNTRIES





PARTNERSHIPS

Forming meaningful partnerships has been a stated objective of funders, particularly the New Zealand Ministry of Foreign Affairs and Trade, over recent years.

Despite this, this survey sees a continuation of a trend towards fewer partnerships with other development actors.

This reduction especially applies to partnerships with other NGOs, both in Aotearoa New Zealand and overseas. While the number of members who have no partnerships with overseas NGOs is growing, those that do, appear to be increasing the number of NGO partners they have. With an increased demand for localisation, understanding how these partnerships have developed and grown would assist the sector to identify how to grow effective partnerships.

The one area to show growth was partnerships with the private sector, where there was a notable increase in members who were providing advisory or research services. This is indicative of an encouraging growth in the value and acceptance of development voices in the private sector.

Maun Paulo Costa. Timor children: Baucau, Timor Leste.

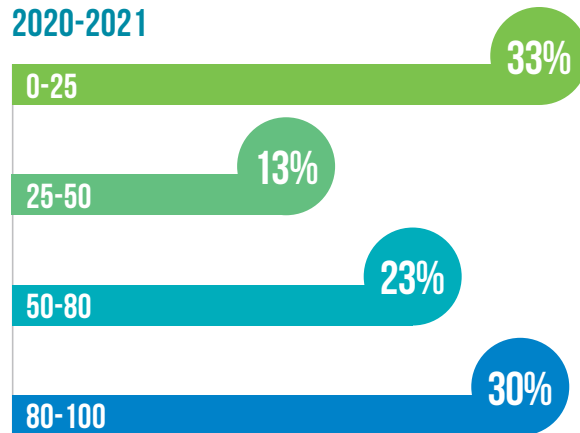
Following the harvest, children of HAFOTI women's livelihoods group members in Baucau enjoy some time-out playing together at a member's rice plantation.



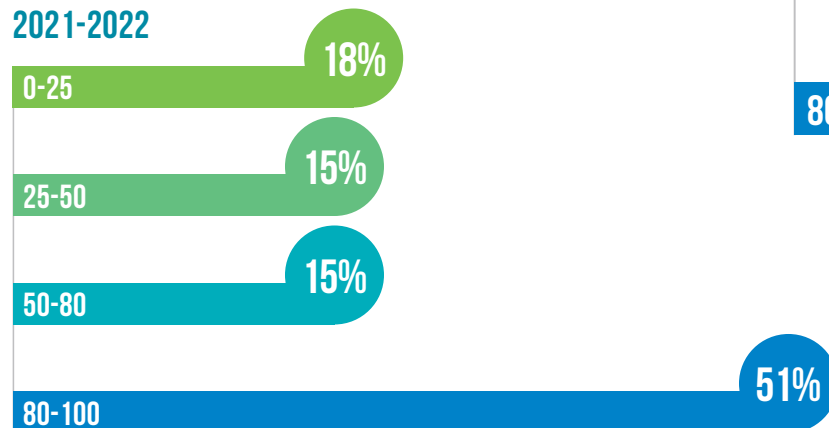
LOCALISATION

The past three years has seen an upwards trend of localisation. Some organisations have increased the number of local partners they work while others have chosen to work with a select few.

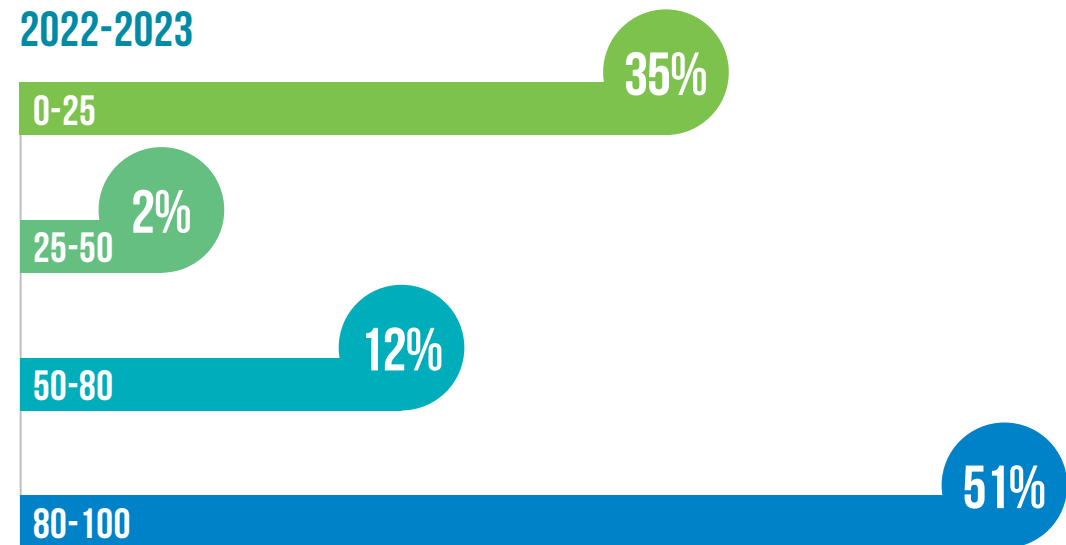
2020-2021



2021-2022



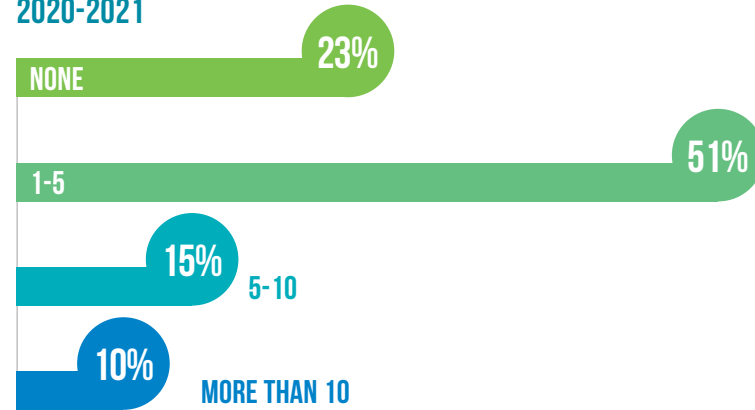
2022-2023



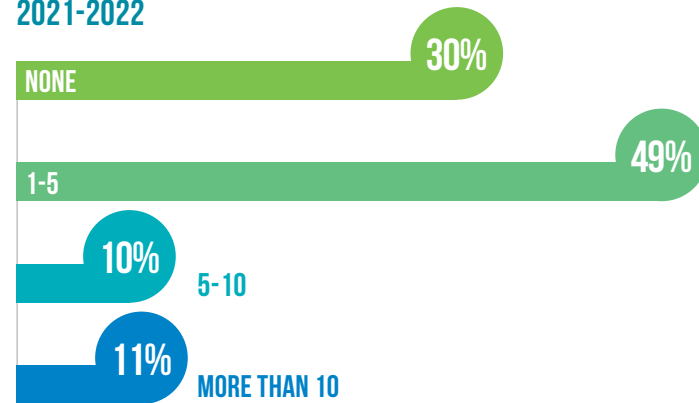


PROGRAMMES & INITIATIVES WITH AN OVERSEAS NGO

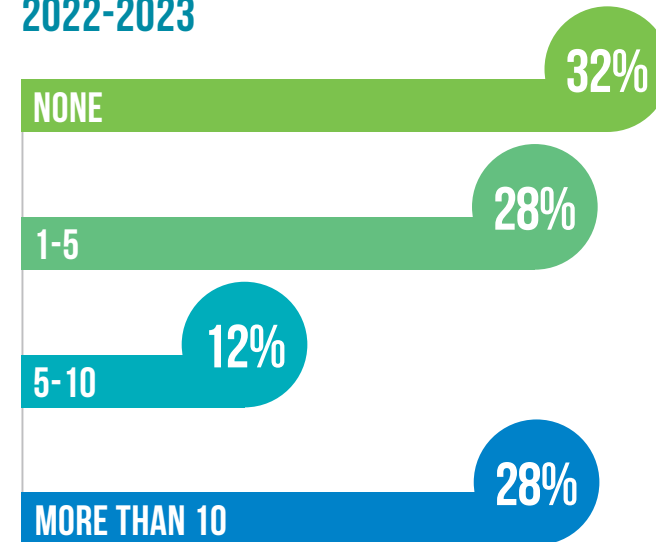
2020-2021



2021-2022

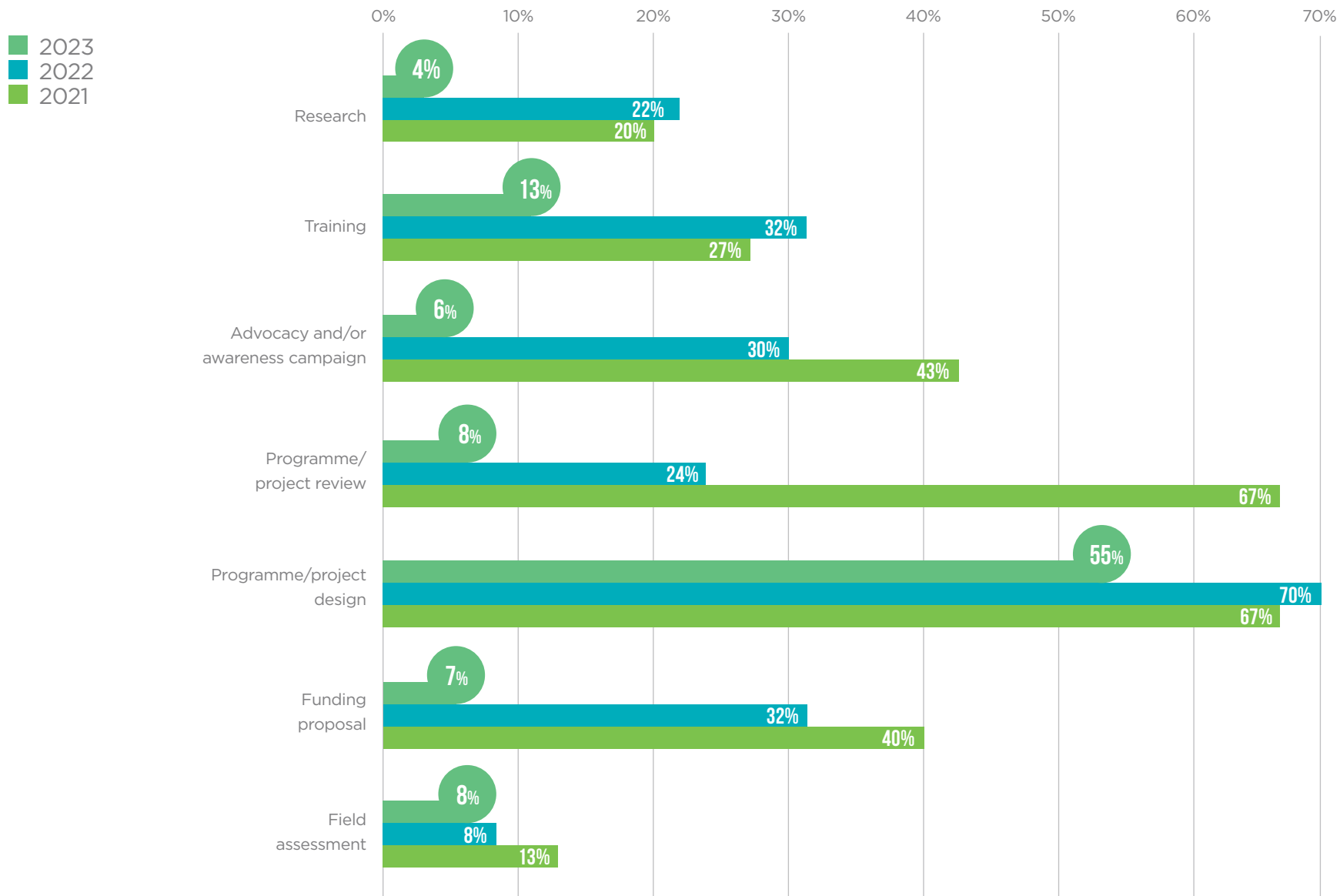


2022-2023





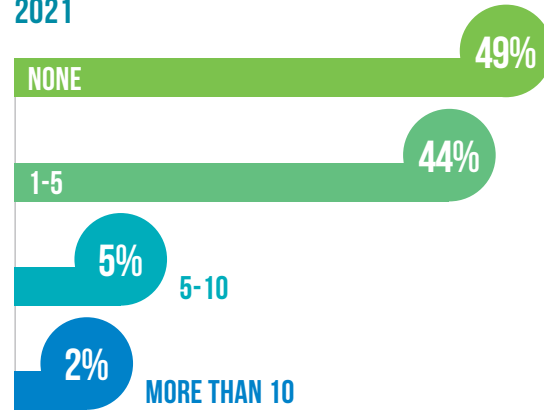
TYPES OF IN-COUNTRY PARTNERSHIPS



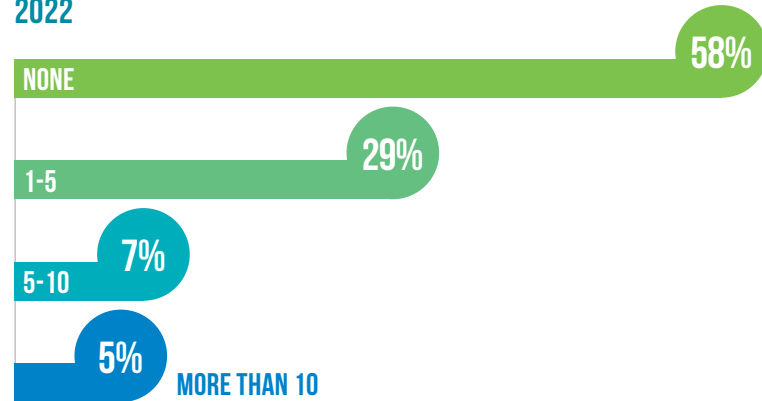


NUMBER OF PARTNERSHIPS WITH AN NZ NGO

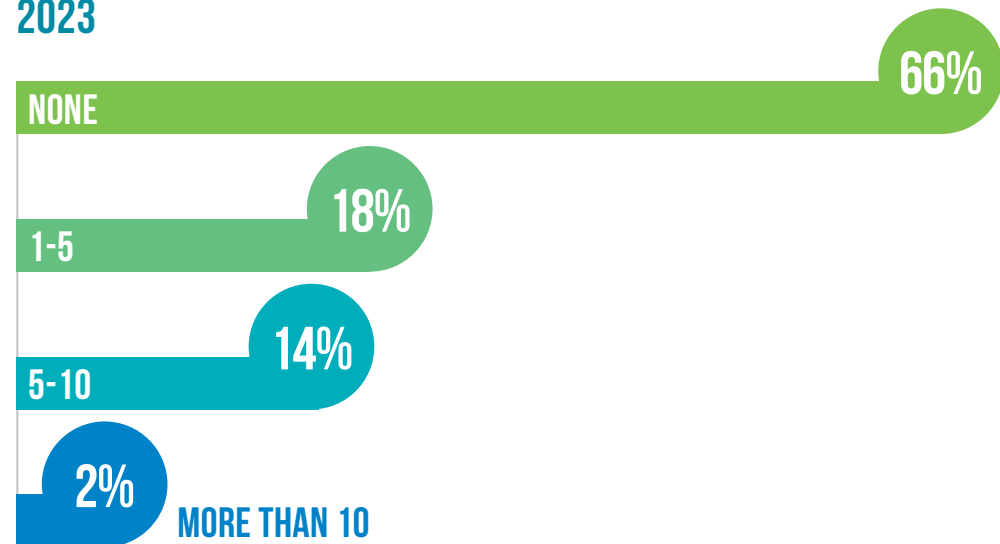
2021



2022



2023



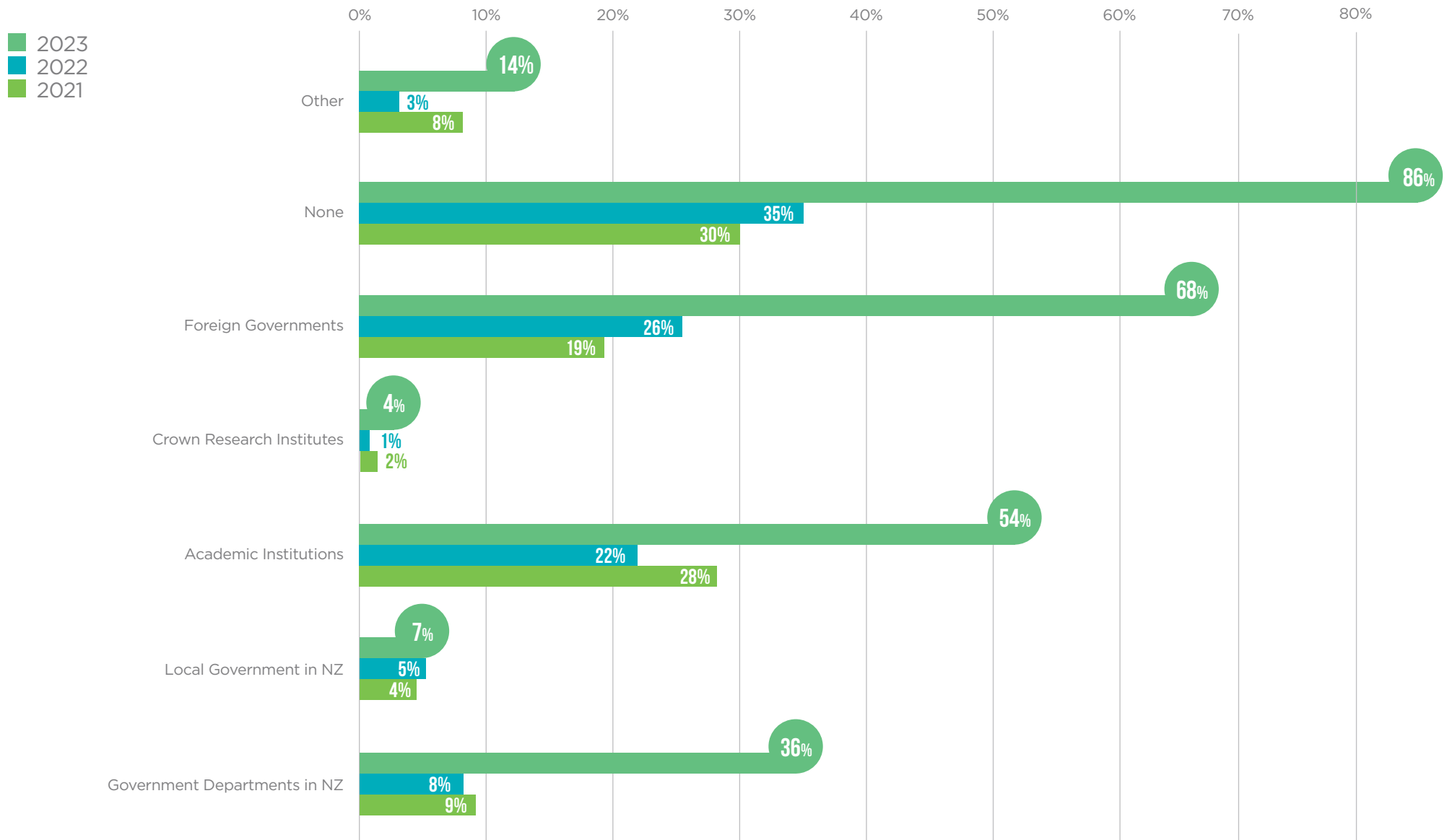


TYPES OF PARTNERSHIPS WITH NZ NGOS



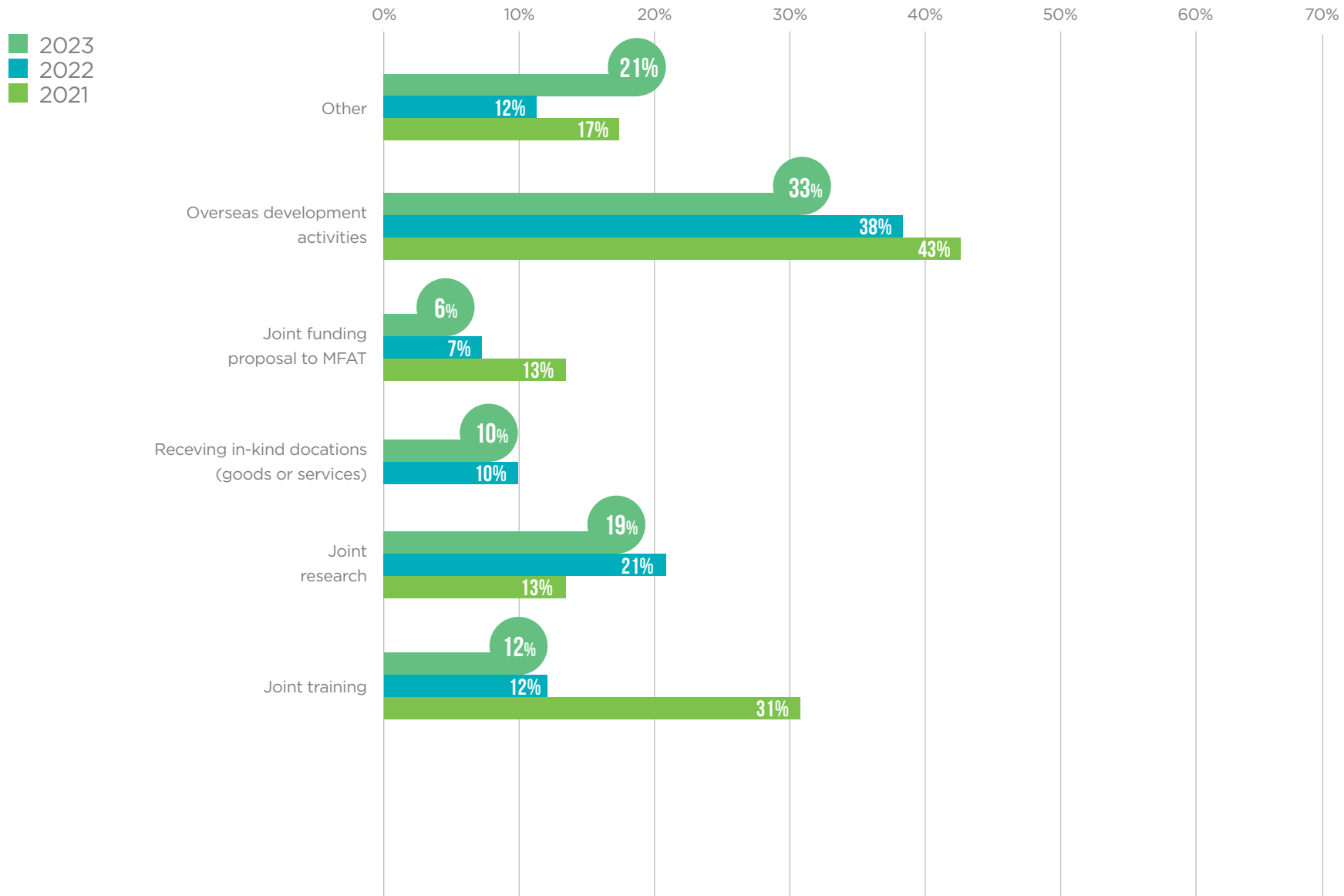


PUBLIC SECTOR PARTNERSHIPS





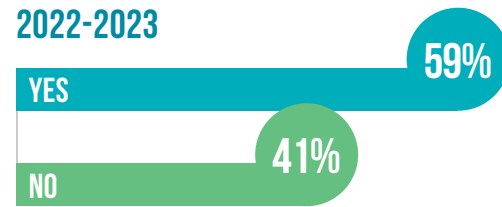
TYPES OF PUBLIC SECTOR PARTNERSHIPS





PARTNERED WITH THE PRIVATE SECTOR

2022-2023



2021-2022



2020-2021



TYPES OF PARTNERSHIP WITH THE PRIVATE SECTOR

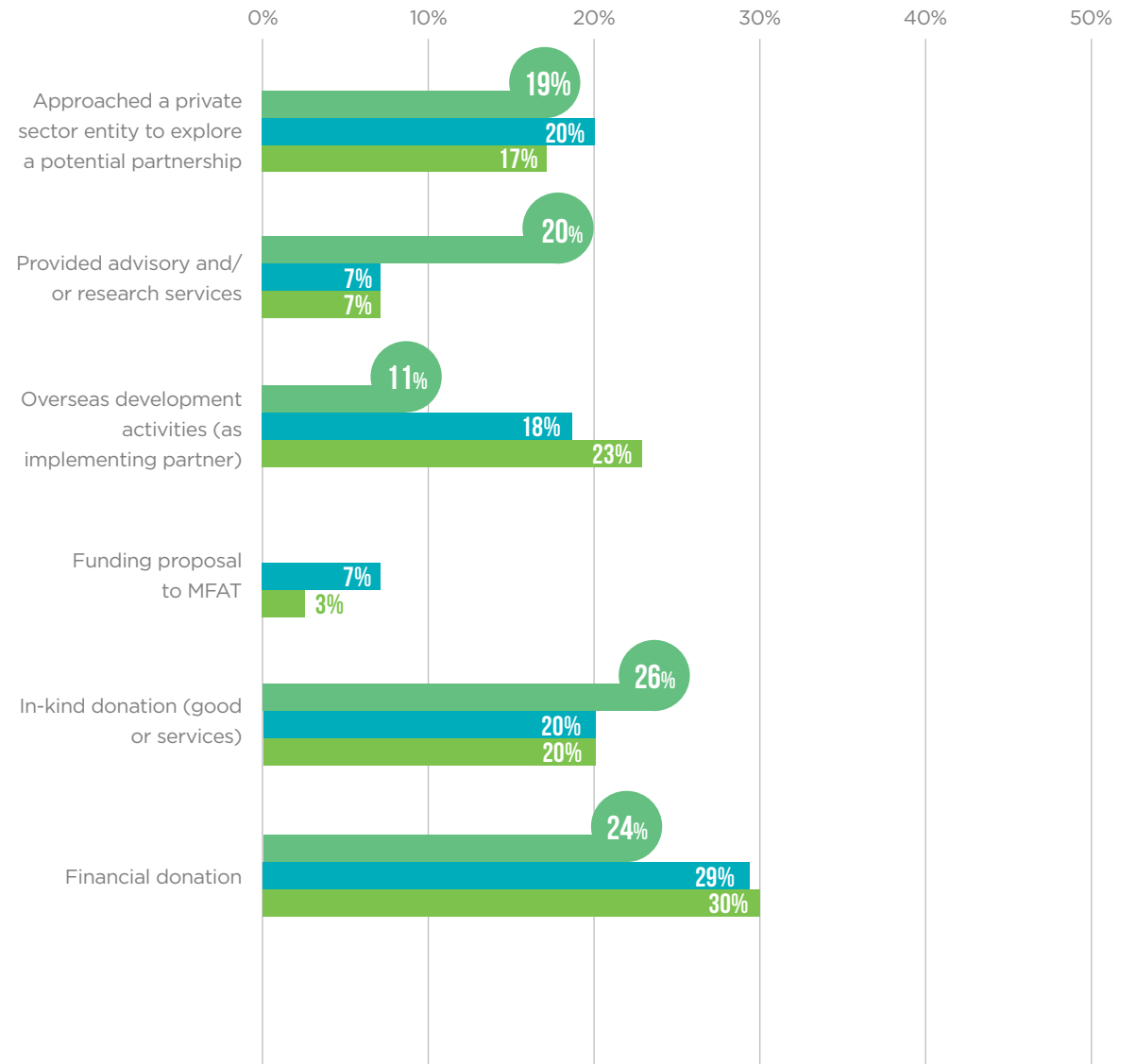




Photo: Kahfy Yudha, SurfAid.

Winner, Locally Led, CID Photo Competition 2023

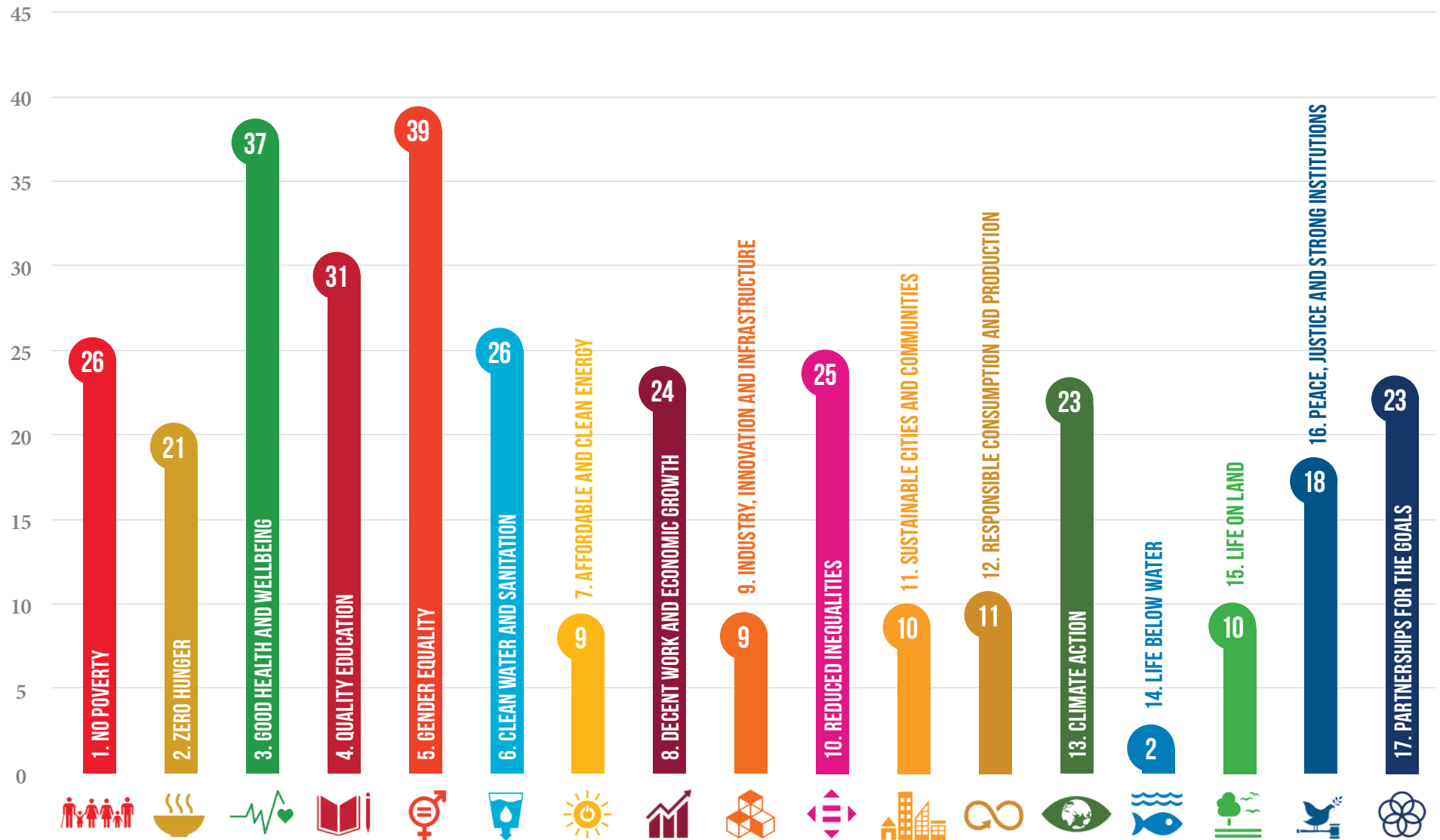
Location: Mentawai Islands, Indonesia

Photographer's name: Kahfy Yudha

A mother with her two children planning their daily meals. The nutrition calendar puts into practice the skills parents learn from local health volunteers during nutrition sessions and cooking classes supported by SurfAid.



WHICH SUSTAINABLE DEVELOPMENT GOALS DO CID MEMBERS FOCUS ON?

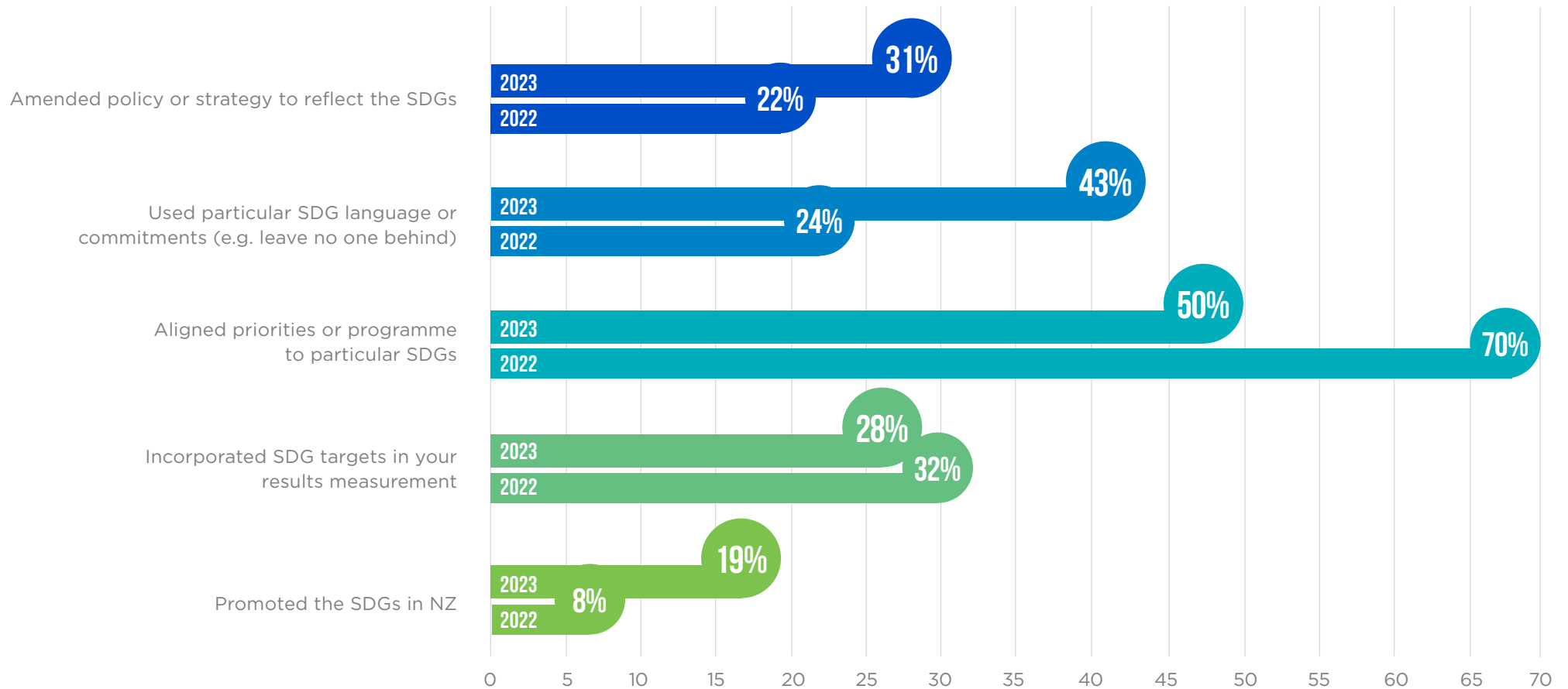




SUSTAINABLE DEVELOPMENT GOALS

Engagement with the SDGs remains surprisingly low, particularly in the areas of measurement and programme priority alignment. The increased focus on SDG language use or commitments hopefully demonstrates an increasing level of engagement in these goals, particularly given the precarious state of progress towards delivering the goals by 2030.

ACTIONS TAKEN BY CID MEMBERS





CONCLUSION

The latest CID Member Survey has seen a consolidation of trends that have been prevalent across the sector for several years, even with the disruption of Covid-19.

Comparing data from 2015-2023 provides valuable insight into recurring themes across the development space and funding trends. Despite the lull due to Covid-19, funding continues positively on an upward trajectory.

Highlights of the last year include the record level of income and development spend, showing an increasing commitment towards development outcomes for the world's most vulnerable.

Within this gain, however, is a small concern that larger organisations are growing faster and smaller organisations are finding it increasingly difficult to be financially sustainable. Given the often more niche focus of smaller development agencies, the sector should consider looking at ways to increase partnerships to include this targeted work in development delivery.

The whole area of partnerships remains a challenge, and we would like to better understand the barriers to increasing partnerships of all forms.

We would also encourage the sector to look at how it can increase its engagement in wider initiatives to promote development both here in Aotearoa New Zealand, and internationally, such as the range of social good measures surveyed and the SDGs. This would both demonstrate increased commitment to these objectives and promote a consolidated view of progress.

The mahi of the development sector is delivered by a hugely committed workforce and contributes to better lives for vulnerable people. We will continue to work alongside the sector to achieve our vision that CID Members are connected, strong and able to deliver positive development outcomes.



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