

filantropia

ACTIVATE

for success in philanthropy

AUGUST 2018

PHILANTHROPY IS CHALLENGING



Why are our applications
unsuccessful?
What does a successful grant
application look like?

How do we find philanthropists?
How can my Board help?

WHY ORGANISATIONS FAIL

- * Did not approach philanthropy in a systematic way.
- * Did not put the donor at the centre of planning, activity, and follow-through.
- * Did not express urgent, compelling need in a way that cuts through.

DEFINITIONS: 'Philanthropy' in the context of this offer and paper means: the activity of securing grants or funding from private individuals or charitable trusts & foundations, including Private Ancillary Funds. 'Philanthropists' in this context means: HNW (high net worth) individuals who donate their private funds to charities for the benefit of the community. These donations may or may not come from a charitable foundation or trust or a Private Ancillary Fund.

OUR EXPERIENCE

Founders and principals of philanthopia designed, and personally deliver 'ACTIVATE'.

Based on their 27 years' combined philanthropy experience, including:

- consulting to HNW donors to design their giving and to find charities that are right for them.
- operating as strategic grant makers to create impact in the community, deploying ~\$800million to charity.
- leadership as board members and executives delivering social impact in both commercial and not-for-profit contexts.

Through ACTIVATE, we advise and support charities to become more capable, experienced and successful in philanthropy.

It's a time-limited engagement of 10 months, designed to create momentum, and build skills and confidence. It's especially useful to organisations with no dedicated philanthropy resource, where competing priorities must be juggled.

ORGANISATIONAL RESULTS

AFTER TIME & INVESTMENT



applications

- Gained greater ability to self-analyse requirements for grant applications and to identify opportunities to apply. Enhance organisational capability in grant application completion.
- Gained improvement in success rate with grant applications.



systems

- Board's awareness of its role in philanthropy has uncovered new opportunities and new networks.
- Internal organisational alignment on shared responsibilities and roles in philanthropy revenue raising has been achieved.
- Stakeholder maps complete and in use.



donor management

- Expanded stakeholder network has identified more opportunities for philanthropy.
- New relationships with potential donors have been forged.
- Strategies for key donors have been designed.
- An internal program for donor stewardship has been created.

DISCLAIMER: 10 months of engagement may not deliver the full spectrum of results.

ELEMENTS

ON-SITE MEETING AT YOUR ORGANISATION BY FILANTROPIA TO UNDERSTAND YOUR ORGANISATION AND MEET YOUR KEY PEOPLE

EMAIL TO YOUR ORGANISATION FROM FILANTROPIA IDENTIFYING YOUR GREATEST OPPORTUNITY

FORMAL TRAINING PRESENTATION ON PHILANTHROPY DELIVERED TO BOARD OR TO STAFF

FACE-TO-FACE COACHING ON YOUR CHOICE OF TOPICS (EXAMPLES BELOW)
SESSION 1

SESSION 2

SESSION 3

SESSION 4

ACCESS VIA PHONE FOR GUIDANCE BETWEEN MEETINGS

- TOPICS**
- BRAINSTORM, DESIGN & REVIEW OF DONOR STEWARDSHIP PROGRAM
 - DESIGN OF STAKEHOLDER MAPS
 - REVIEW OF DRAFT DONOR STRATEGIES
 - REVIEW OF ORGANISATIONAL PITCH TO PHILANTHROPIST
 - REVIEWS OF PREPARED OR DRAFT GRANT APPLICATIONS
 - DISCUSSION AND ANALYSIS OF FAILED GRANT APPLICATION

ACCESS VIA PHONE FOR GUIDANCE BETWEEN MEETINGS

PRINCIPLES OF ENGAGEMENT



CONDITIONS:

Engagement period is 10-months from date of agreement and payment. All face to face meetings can be held via technology links *or* at our office in Fitzroy, Melbourne. Phone and email guidance does not include extensive reading or reviews of material - which is to be confined to scheduled meetings. Verbal feedback *only* will be provided, unless stated. Phone calls will be accepted during regular office hours only, no weekends or any public holidays. Additional charges for philanthropia travel to sites outside metro Melbourne will apply and will be negotiated in advance.

ELIGIBILITY & COSTS

LAUNCHING: 1 SEPTEMBER 2018

COST:
\$5,500 (+GST)

ELIGIBLE ORGANISATIONS:

Not for profits inexperienced or not resourced in systematic philanthropy

Contact us to work out if this is right for your organisation:

Robyn Charlwood

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0417 383 382

DISCLAIMER:

filantropia provides guidance and advice and trains and coaches individuals holding key organisational responsibilities in philanthropy revenue raising. filantropia does not undertake to achieve any financial targets for philanthropic funding set by any organisation participating in 'ACTIVATE'. filantropia makes no commitment to introduce subscribers to philanthropists and no undertaking to achieve philanthropic funding on their behalf.

ABOUT filantropia

filantropia re-thinking philanthropy is an independent professional advisory firm specialising in philanthropy.

filantropia gives strategic advice and guidance to deliver satisfaction and effectiveness to private philanthropists as well as to companies wanting to engage with them.

We are an independent professional advisory firm specialising in philanthropy advice.

Co-founders and directors are Robyn Charlwood and Teresa Zolnierkiewicz. We are based in Melbourne and work nationally. Our experience:

- Private Banking & financial services;
- Not for profit leadership;
- Trusteeship & Wealth Management;
- Running Private Ancillary Funds and charitable foundations;
- Designing philanthropy strategies and programs for impact.

www.filantropia.com.au

filantropia

re-thinking philanthropy

is:

TERESA ZOLNIERKIEWICZ

CO-FOUNDER, DIRECTOR

An accomplished executive in financial services, Teresa's career has focused on philanthropy advice and the donor experience. She is a social change influencer; co-designing giving strategies with high net worth clients to deliver impact for causes, and to satisfy personal and family aspirations in philanthropy and legacy.

Teresa is a experienced speaker, editor and author on philanthropy and giving. Her reputation in the philanthropy industry is underpinned by skills that include - leadership, facilitation, creativity, client focus, meta-thinking and the ability to set vision, build confidence and empower people, teams and other leaders.

Teresa is a non-Executive Director of The Mirabel Foundation and Deputy Chair of The Melbourne International Film Festival and holds a Master of Management, Bachelor of Arts and Diploma of Education and is a Graduate of the Australian Institute of Company Directors.

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ROBYN CHARLWOOD

CO-FOUNDER, DIRECTOR

Robyn is an experienced not for profit leader and CEO, philanthropy strategy designer and relationship expert.

Robyn's ability to transfer skills across sectors has seen her traverse from leadership of a major Australian charity to strategy and relationship development in the financial services industry, particularly in philanthropy. Robyn has co-created a global philanthropy strategy for a major corporation, project managed the creation of a world first digital giving tool and developed a philanthropy strategy for Asian high net worth clients.

Robyn uses her business acumen, diverse career experience and strong interpersonal aptitude to skilfully connect people and communities of interest for mutual benefit.

Robyn is a Williamson Community Leadership alumnus, acting Chair of the Australian Institute of Company Directors Not for Profit Committee. Member, Advisory Committee for Ashton Nixon Bequest. Robyn holds a Bachelor of Science [Hons], Graduate Diploma of Nutrition and Dietetics and Bachelor of Arts [Fine Arts].

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