



Giving Well

SPECIAL REPORT



Structure, strategy fuel funding

BN
FEATURE



“ Our focus is going to be on raising strong corporate and philanthropic partnerships; to listen to our donors, their passions and their interests

– Tori Anderson

RECOGNITION: Tori Anderson says charities should be thanking philanthropists and donors seven times a year for their support. **Photos:** Attila Cszar

Western Australia's 10 largest philanthropic foundations distributed \$65 million last year, but like many charities, some of these organisations are increasingly targeting individual supporters to offset rising fundraising costs.



Tori Wilson

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balls and dinners, have increasingly fallen from favour.

Instead charities such as **Anglicare WA** and fundraising groups such as Perth Children's Hospital Foundation are placing greater emphasis on developing philanthropic partnerships.

To replace Anglicare's once-popular Op Shop Ball, which was last hosted in 2015, the community services organisation launched a new event at St George's Cathedral last year, Angels Rising.

And while Angels Rising exceeded expectations, raising \$180,000 and securing shipbuilder Austal as a corporate partner, new Anglicare WA director of marketing and philanthropy, Tori Anderson, has recommended the event be held on a biennial basis.

Ms Anderson, who has worked in the not-for-profit space for more than a decade, says events can drain a charity of resources and offer the lowest return on investment as a source of fundraising.

Key takeaways

- Philanthropic partnerships among the most effective means of raising funds
- Events deliver a lower ROI than other fundraising methods
- Charities should match funding opportunities with philanthropists' own objectives
- The state's charitable giving dropped in 2017, despite a national increase
- Structured giving has helped some of WA's wealthiest to give strategically

ONCE considered the go-to for fundraising in Western Australia, flagship events, such as charity



COMPASSION: Warwick Hemsley says he supports Anglicare because often people's circumstances are no fault of their own and the organisation addresses community needs.

According to JBWere's 'Support Report 2018', the return on investment from fundraising has consistently fallen over the past decade, partly due to increased competition and increased costs.

Ms Anderson told *Business News* people often associated charities and charity events with gala balls, and while a minority of well-resourced organisations execute them well (see page 26), these events typically weren't efficient.

"So for Anglicare WA, our strong focus isn't actually going to be events," Ms Anderson said.

"Our focus is going to be on raising strong corporate and philanthropic partnerships; to listen to our donors, their passions and their interests and align them with where they'd like to make a transformative difference on the ground."

Anglicare WA's Winter Appeal Committee is one example of how engaging philanthropists can offer a high-value impact without chewing up internal resources.

“ When you look at philanthropy, I think when you have the capacity to help others you do have an obligation to do that - Warwick Hemsley

In 2017, a committee of nine philanthropists raised \$323,000 to benefit people sleeping rough through winter; this year it will call on the community to raise \$350,000, and will match that effort dollar for dollar as it aims to raise \$700,000.

Anglicare WA is ranked 10th (by revenue) on the BNiQ charities list, with about 4 per cent of that from donations, bequests and fundraising. The majority comes from government funding, according to research by *Business News* (see graph page 25).

Co-chairing the Winter Appeal Committee is chairman of property consultancy Hemsley

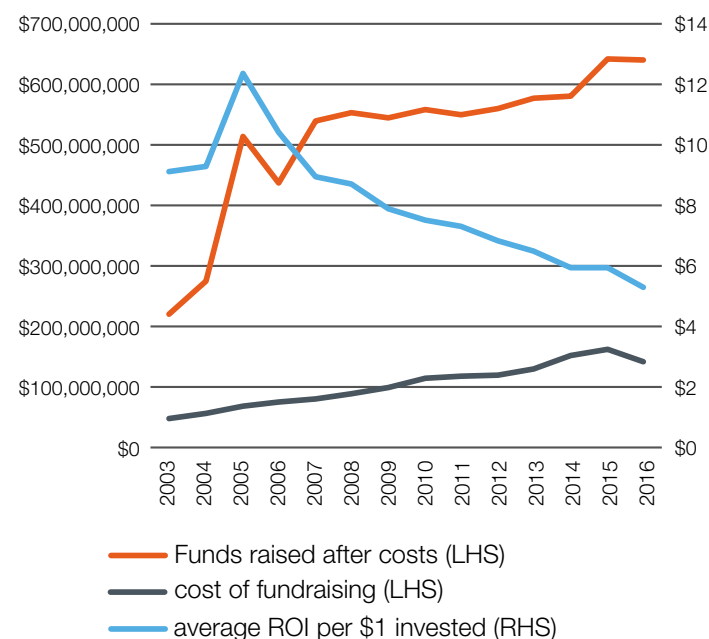
Patterson, **Warwick Hemsley**, who has been an active philanthropist for many years.

Mr Hemsley said the government was never going to be able to cater for all of society's needs, which was the case now more than ever.

"When you look at philanthropy, I think when you have the capacity to help others you do have an obligation to do that, there's an obligation on us to help those people who for whatever reason have fallen by the wayside," Mr Hemsley told *Business News*.

"Often people's circumstances are no fault of their own, some people have good luck and some

Funds raised by Australian charities and their return on investment 2003-2016



Source – ATO Taxation statistics, JBWere Philanthropic Services, www.devpolicy.org

people have bad luck in life; that's why I support and have worked with Anglicare for over a decade.

"Anglicare works very hard to identify the key needs in the community, offering safe beds at



MOTIVATION: Annie Fogarty says she and her husband realised the importance education when they had children.

night for those who are in distress and experience homelessness.”

Mr Hemsley is also a major donor to the arts, including the Art Gallery of WA, WA Opera, and WA Symphony Orchestra.

“I think in any philanthropic program, giving to the arts is worthy of serious consideration,” Mr Hemsley said.

“There’s a lot of evidence to show in the area of mental health the opportunity to have arts experiences can be very therapeutic.”

Growing giving

Research by JBWere suggests that many high income earners don’t make charitable donations.

Its report found that less than 60 per cent of Australians earning over \$1 million annually claimed tax deductible donations, compared with 90 per cent in the US.

Ms Anderson said Australians often didn’t know where or how they should give.

“Often in the not-for-profit

“ We decided to pick one particular area to be strategic and not to spread what we were doing too widely - Annie Fogarty

space we’ll push our own agenda rather than actually listening to a philanthropist or an individual and growing the culture,” she said.

Perth Children’s Hospital Foundation chief executive Carrick Robinson said the days were long gone when charitable organisations could ask for money by simply claiming it as a worthy cause.

“I think your ability to match your funding opportunities with philanthropists’ and corporates’ own objectives is a strategic move in modern times,” Mr Robinson told *Business News*.

Ranked fourth by funds distributed on BNIQ’s philanthropic

foundations list (see page 28), PCHF distributed almost \$4 million to the Perth Children’s Hospital in the 2016-17 financial year.

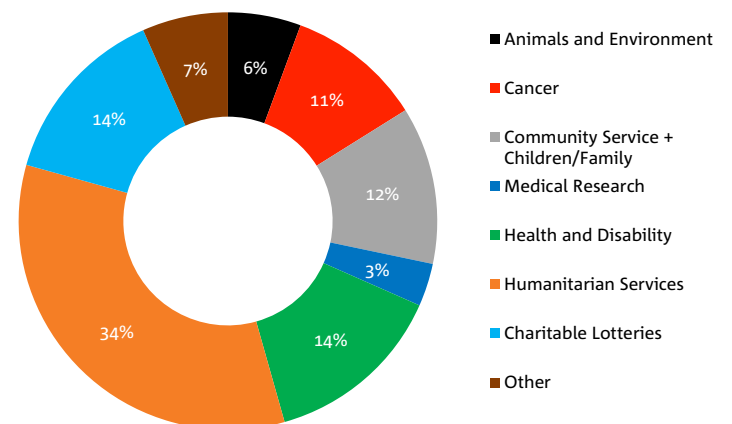
“Core to our success has been being able to establish long and enduring partnerships with well-known philanthropy organisations and individuals who know where the money is going and the impact it’s making,” Mr Robinson said.

“And over the years, we’ve gained a long and proud history of funding some life-changing programs for the hospital, through equipment, research or education and training.”

Mr Robinson said one notable

NAB charitable giving index

MARKET SHARE OF TOTAL CHARITY DONATIONS - WA
(12-months to February 2018)



Source: NAB charitable giving index

example of PCHF’s work was its Rewalk machine, which helped quadriplegic patients who had suffered catastrophic accidents.

“There are only three of those in Australia and we were able to purchase one thanks to some

very generous donors for the hospital,” he said.

“They’re able to see themselves moving around and go outside, and it’s starting to help their therapy with getting their muscles stronger again.”

Events

Mr Robinson said while philanthropic and corporate partnerships were among the most effective means of attracting funds, PCHF undertook a wide range of traditional fundraising methods.

He said PCHF focused on community-based events, such as its QV1 abseiling event and the Big Walk, because they were more than just a money exercise and brought people together.

"I think what you have to be careful about with events these days is your return on investment would be very strict, and if you can't model it to get a decent outcome then a lot of time, energy and money can easily be wasted," Mr Robinson said.

"We've seen some events that have been very grand in scale and expensive to put on starting to be seen less and less of, and I think that's really in response to having very strict and stringent return-on-investment modelling."

Low-key information events, networking events, or intimate 'thank you' events for donors is the approach taken by the WA arm of global charitable organisation **The Hunger Project**, which raises all of its funds through the support of philanthropists and regular donors.

WA board member **April Jorgensen**, owner and chairperson of the beauty training business Niche Education Group, said WA had raised \$6.4 million for The Hunger Project over the past 10 years through donations.

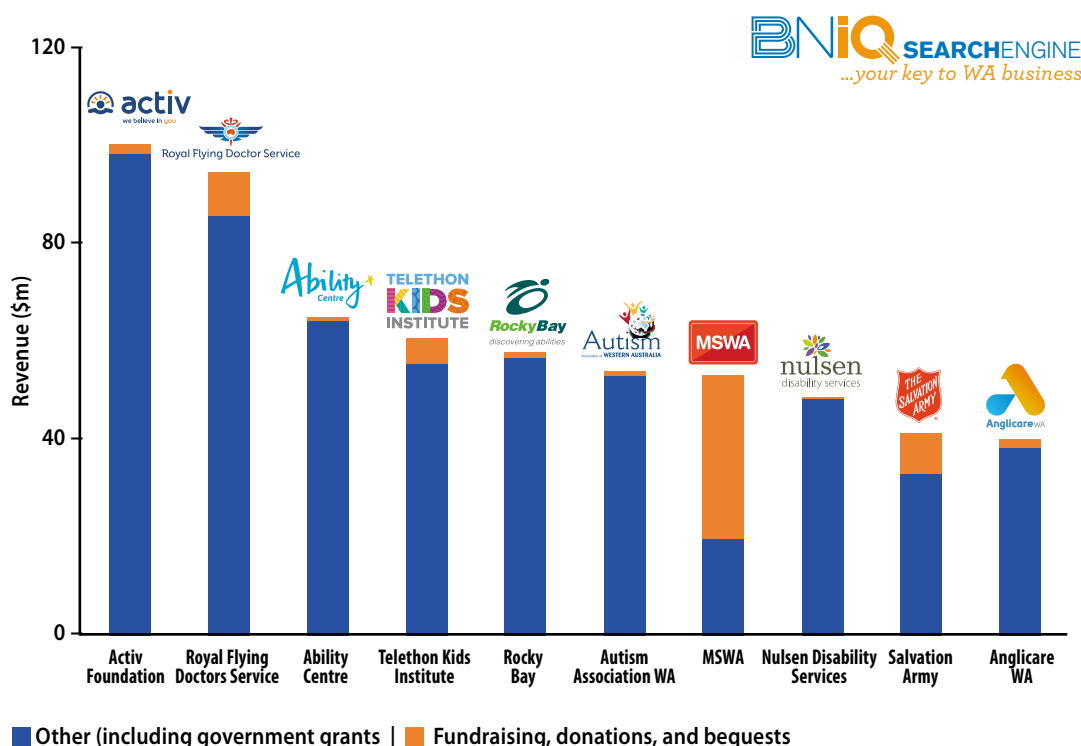
"Many organisations will accept smaller pockets of cash but that hasn't really been the process of fundraising for The Hunger Project," Ms Jorgensen said.

"The process of fundraising for The Hunger Project has always been focusing on individuals, families or businesses to contribute and then really engage them in the process of 'this is where the funds are going to and this is what we're achieving.'"

The Hunger Project aims to combat the cycle of poverty by encouraging entrepreneurialism and self-reliance within struggling communities across the world, particularly through their women.

It helps facilitate the construction of customised community 'epicentres', which may include schooling facilities, a health precinct, a business

WA's top ten charities: revenue by source



■ Other (including government grants) | ■ Fundraising, donations, and bequests

Source: BNiQ

skills centre, among other amenities and services.

Ms Jorgensen, a 2014 40under40 winner, was made head of the WA investor consortium last year, meaning she was tasked with raising \$200,000 to be put towards the final three years of developing a centre in Senegal, Africa.

"Luckily The Hunger Project has been fairly influential in Perth for the past six years, so we do have a lot of existing investors and existing interest," Ms Jorgensen said.

"So when we had events for my epicentre we held a cocktail party, something relatively simple; we don't believe in holding a whole ball, for example, which has very high overhead costs."

For several years Ms Jorgensen has also been contributing a percentage of Niche Education Group's profits to The Hunger Project, in addition to training several refugee and asylum seekers each year for free.

Merchant Group founder **Andrew Chapman** has also leveraged his business and networks to champion a charity – **OzHarvest**.

Mr Chapman established the WA arm of the food rescue charity in 2014 after realising the state was missing out on a worthy resource due to a lack of local leadership.

"People generally want to give; it's just people don't want to give necessarily to huge organisations and we found at OzHarvest that you need to have that person in WA to champion the cause," Mr Chapman told *Business News*.

Mr Chapman said he was vocal about his involvement in OzHarvest, asking friends and clients to give as part of his participation in its CEO Cookoff.

He said, for them, knowing he was involved took some of the risk away and increased their confidence in giving.

Mr Chapman has consistently been the top fundraiser, and this year raised \$312,000 of the total \$2 million raised, taking his contribution to OzHarvest to about \$700,000 since 2014, all of which was directed to WA.

Structured philanthropy

While some philanthropic foundations such as the Chanel 7 Telethon Trust – which is number one on the BNiQ list – actively raise funds every year, other foundations are back by wealthy families.

At the very largest end of giving is the Forrest family, with its **Minderoo Foundation** ranked second by funds distributed on BNiQ's philanthropic foundation list, having distributed close to \$7 million last financial year.

Stan Perron Charitable Trust, ranked third, distributed about

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within WA, with the Fogarty EDvance school leadership support model being one of its most significant outcomes.

Executive chair Annie Fogarty said the program was working with 67 schools in the state and providing training to more than 165 school leaders, which was affecting more than 30,000 students.

"All of the schools we've worked with so far have showed improvements in learning outcomes, 60 per cent have shown significant improvements so we know those children's life opportunities are going to be better because of it," Mrs Fogarty told *Business News*.

Mrs Fogarty said she and her husband, Brett, had always been entrepreneurial, and took a proactive and hands-on approach to decision-making when they established the foundation.

"We decided to pick one particular area to be strategic and not to spread what we were doing too widely, partly the financial aspect we thought we'd have more impact, but also if we worked in one area we would get to know it, which we have," she said.

In the corporate sector, financial services company Euroz has applied a structure to its giving strategy in order to grow its capacity to distribute funds.

The Euroz Charitable Foundation was formed in 2007 as a PAF and has distributed \$1.2 million since inception (mainly to small to medium WA charities), with the intention to grow the fund and increase giving when possible.

The foundation's chairman, Andrew McKenzie, said it would give away \$150,000 this year, which compared with about \$20,000 from the fund's first year.

Before the fund was established, Euroz had struggled to determine its obligations as a business to give back to society, Mr McKenzie said.

"We'd just do ad hoc bits of money here and there and you'd get a tax deduction and that sort of thing, and then the (2004) tsunami happened and I started reading about the private ancillary fund structure, which had just come out around that time and that was probably the major catalyst," he said.

Mr McKenzie said it preferred to support smaller charities within WA where relatively modest donations would have an impact.

\$4.5 million for the financial year.

Additionally, children's charity Parkerville recently announced Stan Perron had donated \$5 million to its community centre being developed in Midland.

Lotterywest also contributed \$4.5 million to the Stan and Jean Perron Child Advocacy Centre, where a variety of different agencies and professionals will come together to offer a central hub for youth subjected to trauma.

The McCusker Charitable Foundation, ranked eighth, formalised its structure last year by registering as a PAF.

In 2017, the foundation donated \$1.9 million to Telethon and \$1 million to Barry Marshall's Noisy Guts Project through the University of Western Australia.

McCusker Foundation director Tonya McCusker said Telethon's governance around the distribution of funds was attractive, while the UWA gut health project was an "out of the box" program that had struggled to secure funding.

"We are most passionate about supporting the brilliant researchers investigating the cause and finding cures for these medical conditions," Mrs McCusker told *Business News*.

Meanwhile, the **Fogarty Foundation** is committed to bettering the education opportunities

Rank	Change from previous year	Company name	Senior executive and title	Year est. in WA	Total staff in WA	Balance date	WA Revenue a) most recent year b) previous year	Total Assets	Notable corporate supporters	Board Members
1	—	Activ Foundation	Ms Danielle Newport Chief Executive	1951	2,172	30-Jun-17	a) \$100.1m b) \$99.1m	\$62.1m	Lotterywest, Chevron City to Surf for Activ, Channel Nine, Hyundai Motor Company Australia, Travelkey, Lease Plan, JMarsh Australia, National Disability Insurance Agency	Andrew Edwardes (Chair), Ian Brown, Stephanie Black, Neil Guard, Craig Knox Lyttle, Julie Cox, Andrew Leroy, Dale Calhoun, Matt Wisniewski
2	—	Royal Flying Doctor Service	Ms Rebecca Tomkinson Chief Executive	1935	287	30-Jun-17	a) \$94.6m b) \$97.8m	\$130.3m	Rio Tinto, Pilatus, CBH, Roy Hill, Karara Mining, Sell and Parker, Sandfire Resources, Anchor Foods, Gibbscorp, Agrimaster	Sam Walsh (Chair), Saul Harben, John Walker, Robert Liddell, John Croser, Ann Ward, Colin Heath, Robyn Sermon, Erica Smyth
3	—	Ability Centre	Mr Darren Cutri Acting Chief Executive	1951	952	30-Jun-17	a) \$64.7m b) \$66.0m	\$71.3m	Lavan Legal, The Old Brewery, Margaria Cleaning Group, APN Outdoor, Nova 93.7, Princess Margaret Hospital, Telethon Kids Institute, Act.Belong.Commit	Justin Scanlan (Chair), Daniel Butler, Robert Radley, Melissa Northcott, Ken Nylander, Janelle Marr, Roslyn Elmes, Gary McGrath, Priya Cooper, Mino Intini
4	—	Telethon Kids Institute	Mr Jonathan Carapetis Director	1990	537	31-Dec-16	a) \$60.6m b) \$50.3m	\$139.2m	Channel 7 Telethon, BHP Billiton, Wesfarmers	John Langoulant (Chair), Jonathan Carapetis, Nicole O'Connor, Fiona Drummond, Alex Brown, Jeff Dowling, Michael McAnearney, Rohan Williams, Jozef Gecz, Jane Muirsmith
5	—	Rocky Bay	Mr Michael Tait Chief Executive	1938	850	30-Jun-17	a) \$57.7m b) \$44.3m	\$23.1m	AHG, Lotterywest, Disability Employment Services, Deloitte, Fremantle Dockers Foundation, Stan Perron Charitable Foundation, Landcorp, Enduraclad, Santa Fe Wridgways, Acton Real Estate, Jardine Lloyd Thomson, Programmed, Vanquip Mobilities, Zurich, Westpac, Variety, Royal Fremantle Golf Club, Sylex	Graham McHarrie (Chair), Susan Male, Chris Catlow, Paul Klein, Carolyn Hall, Miriam Borthwick, Veronica Parish, Jeff Holloway, Garry Johnson, Chris Ryan, Richard Diermayer, Martin Wandmaker
6	—	Autism Association of WA	Ms Joan McKenna Kerr Chief Executive	1967	694	30-Jun-17	a) \$53.7m b) \$49.3m	\$44.7m	Zenith Insurance Services, West Coast Institute, Kate James: Mindfulness, Meditation & Relaxation, City of Fremantle	Rob Storer (Chair), Trevor Parry, Mark Altus, Bobby Brownhill, Louis I Landau, Vicki Rank, Duncan Monro
7	—	MSWA	Mr Marcus Stafford Chief Executive	1973	673	30-Jun-17	a) \$52.9m b) \$48.7m	\$38.8m	The Brand Agency, Channel 9, Retravision, Enerflex, IRDI Legal, Amity Travel, ShopRite, City of Joondalup, Emirates, Frasers King Park, Perth Integrated Health, ANZ, City of Albany, City of Bunbury	George Pampacos (President), Greg Brindle, Joanne Samer, Bill Hassell, Horst Benimmerl, Ros Harman, Bill Carroll, Jason Jordan, Peter Wright, Greg Brotherson, David Jones, Glennys Marsdon, Liam Roche
8	—	Nulsen Disability Services	Mr Gordon Trewern Chief Executive	1954	744	30-Jun-17	a) \$48.3m	\$28.0m	Homebuyers Centre, Zenith Insurance Services, ATCO Gas, Kailis Bros Leederville, Novotel Perth Langley, Margo Halbert, Lush Digital, McCusker Charitable Foundation, Crown Resorts, Realmark	David Gilchrist (Chair), Kent Burwash, Evelyn Hogg, Adam Smith, Debra Letica, Troy MacMillan, Simon te Brinke, Penny Knight
9	↑	Clontarf Foundation	Mr Gerard Neesham Chief Executive	2000	108	31-Dec-17	a) \$41.2m b) \$33.1m	\$75.2m	Wesfarmers, Rio Tinto Australia, Caltex Australia, Woodside Energy, Programmed, Qantas Airways, Google Australia, ABN Group Foundation, AMP Foundation, Bank of Queensland, Herbert Smith Freehills, Hastings Deering, Iluka Resources	Ross Kelly (Chair), Gerard Neesham, Tom O'Leary, Ennio Tavani, John Gillam, Brian Tyson, Danny Ford, Marilyn Morgan, David Neesham, Harry Neesham.
10	↓	Salvation Army	Mr Chris Reid Divisional Commander, WA Division	1891	718	30-Jun-17	a) \$41.0m b) \$40.5m	N/A	REIWA, ABN Group, Perth Arena, Bendigo Bank, Crown Perth, Westpac, Karrinyup Shopping Centre	
11	↓	Anglicare WA	Mr Ian Carter Chief Executive	1976	533	30-Jun-17	a) \$39.8m b) \$38.8m	\$28.4m	Austal, Hawaiian, Peet, BHP Billiton, Crown Perth	John Barrington (Chair), Erica Haddon, Peter Harley, Andrew Friars, Michelle Scott, John O'Connor, Sue Robertson, Julie Baker
12	↓	Rise Network	Ms Justine Colyer Chief Executive	1983	551	30-Jun-17	a) \$36.9m b) \$25.9m	\$32.2m		Alf Lay (Chair), John Sobolewski, Chris Nicoloff, Tony Borger, Paul Leuba, Karen O'Neill, Jesper Sentow, Helena Jakupovic, Jill Jamieson
13	—	UnitingCare West	Ms Amanda Hunt Chief Executive	2006	384	30-Jun-17	a) \$34.4m b) \$34.2m	\$37.8m	Alinta Energy, Ausdrill, Clayton Utz, GR Engineering Services, Target, Perth Eye Hospital, Tang Technology	Peter Fitzpatrick (Chair), Glenda Campbell-Evans, Michael Brady, Lisa Fini, Chris Ford, Chris Hunt, Deborah Marshall, Mark Webb, Ron Chalmers, Alison McCubbin and Laurel Sellers, Amanda Hunt .
14	↑	Identitywa	Ms Marina Re Chief Executive	1977	548	30-Jun-17	a) \$32.7m b) \$30.4m	\$22.7m	Lotterywest, Catholic Super, Department of Communities, Home and Community Care, Lifelink, National Disability Insurance Agency	Graeme Mander (Chair), Linda Walsh, Terry Wilson, Phil Scott, Nathan Ebbs, Levy Mpofo, Jenny Drury, Tony Curry
15	↑	Cancer Council WA	Mr Ashley Reid Chief Executive	1958	192	30-Jun-17	a) \$31.7m b) \$25.1m	\$62.2m	West Coast Eagles, Dry July Foundation, Blueprint Wealth, Australia Post, Caltex, CBH Group, HBF, K&L Gates, Kott Gunning, Jackson McDonald, Metropolitan Cemeteries Board, Mitsui, MNG, NRW, Parmelia Hilton, Pharmacy 777, Pindan, Repco, Sandfire Resources	Professor George Yeoh, Professor Kingsley Faulkner, Pina Caffarelli, Hon. Hendy Cowan, Professor Michael Henderson, Matt Kelly, Dr Paul Cannell, Suzanne Ardagh, Cheryl Chan, Gavin Bain

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 RANKED BY WA REVENUE, MOST RECENT FINANCIAL YEAR
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All information compiled using surveys, publicly available data and contact with industry sources. Other companies may be eligible for inclusion. If you believe your company is eligible, please email claire.byl@businessnews.com.au. WND: Would Not Disclose, NFP: Not For Publication, N/A: Not Applicable or Not Available.

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Events still deliver the goods

A selection of charities show fundraising events still work for some, defying a general shift away from the strategy as it becomes more challenging.

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THE Royal Flying Doctor Service clearly has a keen understanding of what's required to run a successful not-for-profit operation, as its rating as Australia's most trusted charity for the past seven years would attest.

The consistent results of the Charitable Reputation Index suggest the RFDS is doing its work consistently well, and among the things it does best is engage with the community through its big events.

And while this runs counter to the narrative among other players in the sector that signature events are past their use-by date, chief executive Rebecca Tomkinson says it forms part of the service's overall fundraising strategy.

Ms Tomkinson joined the 99-year-old charity late last year as its first female chief executive, and says RFDS WA takes a diverse approach to fundraising that includes events as a means to engage philanthropists.

"Our flagship event is the annual Altitude Ball and there is a bit of a game changer this year, we're really looking at how we can connect more with community so this year we're bringing it right here to our home to hold a 'hanger party'," Ms Tomkinson told *Business News*.

Ms Tomkinson said that, in addition to raising funds, well-delivered events helped organisations tell their story and strengthen people's attraction to a cause.

"We have been very engaged with the philanthropic community about being able to deliver on that fundraising, so it is as much an opportunity for us to engage with people who support us, and to tell our story for those who perhaps don't know us as well," she said.

Recently, RFDS was able to introduce two new upgraded planes to its fleet thanks to a combination of private fundraising through events and philanthropy.

"Their capability is they'll be able to fly higher, and when



PURPOSE: Rebecca Tomkinson says events are an opportunity to engage with philanthropists and connect them with the RFDS's story. Photo: Attila Cszasz

“ Our flagship event is the annual Altitude Ball and there is a bit of a game changer this year ... we're bringing it right here to our home to hold a 'hanger party'

– Rebecca Tomkinson

you're at altitude it's much more comfortable," Ms Tomkinson said.

"They'll also fly faster and be able to take three stretchers instead of two, and be able to take two medical teams on board instead of one.

"It's important to acknowledge **Rio Tinto** is a foundation partner with those jets and they have

contributed \$10 million over the past four years."

The service is now aiming to raise an additional \$14 million to add more upgraded planes to its fleet.

The RFDS is ranked second by revenue on BNiQ's charities list, with almost 10 per cent of its \$94.6 million attributed to its fundraising efforts, donations

and bequests according to *Business News* research.

Of that sum, its flagship Altitude Ball raised about \$300,000 in 2017, Ms Tomkinson said, while the Gibb River Challenge raised around \$460,000 and the Outback Air Race raised about \$400,000 to be distributed nationally.

And while the ball is managed by the RFDS, the Gibb River Challenge and the Outback Air Race are organised independently by philanthropists, respectively policeman Simon Rimmer and businessman Stuart Payne.

The **Harry Perkins Institute of Medical Research** and Variety WA are two other examples of large

NFPs reliant on the funds raised through events.

Harry Perkins head of marketing and fundraising Paige Gibbs said events were not only a good source of fundraising for the organisation, but an effective branding exercise that worked to attract new donors.

Ranked 19th on BNiQ's charities list, Harry Perkins reaps valuable rewards from the **MACA Ride to Conquer Cancer**, which accounts for about 15 per cent of the institute's income.

The event has raised \$27.5 million for research since inception seven years ago, with \$4.1 million raised last year across 855 riders.

And across just 30 participants, **Variety WA** managed to raise \$580,000 last year through its Variety Bash, which is currently in its 30th year.

Ranked 82nd on BNiQ's charities list, **Autism West** represents a smaller charity that considers events to be an integral aspect of its strategy.

This year, Autism West is seeking to expand its Team Sprint Cup swimming event, which has raised about \$1 million across its 10-year life, according to chief executive Alison Davis.

"Historically, we used to do lots of little events and I thought that was probably not the best use of our resources, which are absolutely limited," Ms Davis said.

"What we've tried to do in the last year or two is reduce the number of events we have to make them more successful.

"What we see is this being something bigger and better and reaching a wider audience of school kids, corporates and families."

As part of a diverse funding strategy, Ms Davis said the organisation would be leveraging its recently developed partnership with Venues West to expand the event.

"We want people to know what autism means, we want people to be familiar and comfortable with the word," she said.

BNiQ SEARCH Royal Flying Doctor Service

There are **121** results from our index of **94,466** articles, **9,354** companies and **32,713** people



CHALLENGE: Tom Ferrier says companies are finding it hard to engage employees in giving programs. Photo: Chris Pavlich

The expectation that companies act in a more philanthropic manner has given rise to Purposed, a startup solution to simplify corporate and employee giving.

Tori Wilson

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TOM Ferrier sees a bright future for 'for-purpose' organisations, also known as social enterprises, predicting their business model will ensure they thrive in a future marketplace dominated by socially aware millennials.

The former IT director left the logistics services company Brambles late last year to develop Purposed, a platform solution that allows companies to undertake easier and more effective corporate giving, while encouraging employees to contribute.

"About 90 per cent of consumers these days are likely to switch brands to one that has a more ethical or social cause behind it, while 44 per cent of millennials would leave their current employer in the next two years for more meaningful jobs," Mr Ferrier told *Business News*.

Currently in the process of developing a digital platform that will offer customised solutions to suit companies' corporate giving objectives, Purposed held a think tank and 'shark tank' early this year that brought together 74 Australian corporates, charities, and government bodies.

It was found that while many corporates and charities wanted

to increase collaboration, managing programs was immensely time consuming, it was difficult to attract employee participation, and many organisations weren't measuring the outcomes of their investments.

With a panel that included Minderoo Foundation chief executive **Nicola Forrest**, businessman and philanthropist **David Gonski**, and Philanthropy Australia chief executive **Sarah Davies**, the corporates and charities were challenged with the question, 'How do we inspire more and better corporate giving at scale?'

The winning team, with members from accounting firm EY and Starlight Children's Foundation, presented a gamified solution designed to encourage corporate giving by exchanging time and money provided to a charity for options such as time off work and career development opportunities.

Mr Ferrier said a wide array of ideas came out of the event and he'd be looking to cherry pick several to embed in the Purposed solution.

"Every organisation is going to be different, so what we're looking to do with our foundation customers and our target market of large corporates with more than

5,000 employees is to sit down and create something different that isn't about giving, that isn't about volunteering, but it's about generating greater social impact," he said.

As a panellist at the Purposed events, Mrs Forrest said it was widely accepted that giving didn't just benefit the recipient but also the company in attracting and retaining staff, appealing to customers and working with governments.

"I believe everyone has a responsibility to give ... corporates have such central, connected roles in communities so, just like individuals, have a responsibility to use that position to give back," she said.

"On top of this it's simply good business."

However, while Deloitte social sustainability specialist **Leeora Black** said philanthropy could comprise one aspect of a company's social licence to operate, she did not necessarily believe corporates were obliged to be philanthropic.

"Philanthropy is always going to be contingent on how much profit you're making whereas good business conduct is contingent on daily decision making," Dr Black told *Business News*.

“ Let’s sit down, let’s create something different that isn’t about giving, that isn’t about volunteering, but it’s about generating greater social impact - Tom Ferrier

She said a social licence was based on the level of acceptance a group of stakeholders gave to a company, and philanthropy alone would not be enough.

"There are many companies that think they can secure a social licence by giving community donations, but it's not something that will grow according to how many dollars you invest in communities; it will grow in proportion to how well communities and stakeholders regard you for the full range of your activities," Dr Black said.

"Strategic philanthropy would help more than what I call confetti philanthropy, where you give money to just any cause that takes your fancy.

"Strategic philanthropy is more

likely to help contribute to your reputation as being a socially responsible company.

"Unfortunately there are too many philanthropists still who give money without necessarily thinking about how they're going to measure the effect of that."

She said Rio Tinto and BHP Billiton demonstrated strategic philanthropy by aligning their giving with the needs of the communities in which they operate, and then measuring and reporting the outcomes of their investments.

Mr Ferrier said when customising its solutions, Purposed would be partnering with research bodies to select several key outcome metrics that would capture impact achieved over time.

ENIQ SEARCH Minderoo Foundation

There are **42** results from our index of **94,466** articles, **9,354** companies and **32,713** people

Rank	Change from previous year	Company name	Senior executive and title	Year est. in WA	Balance date	WA Revenue (\$m) a) recent financial year b) previous financial year	Total Assets (\$m)	Donations, bequests received (\$m) a) most recent financial year b) previous financial year	Funds distributed (\$m) a) most recent financial year b) previous financial year	Board Members	Core function
1	—	Channel 7 Telethon Trust	Ms Marie-Anne Keeffe General Manager	1968	31-Dec-16	a) 28.6 b) 27.9	28.1	a) 20.6 b) 20.4	a) 27.3 b) 24.8	Kerry Stokes (Chair), Michael Ellis, Richard Court, Chris Wharton, Nick Stagg, Tim Roberts, Domenicantonio Cosimo (Tony) Vallenga, Christine Simpson Stokes, Brett McCarthy, Jeff Newman, Tonya McCusker, Mario D'Orazio.	Provide financial support towards the medical and social welfare of children and young people, and fund research into children's diseases
2	—	Minderoo Foundation	Ms Nicola Forrest Chief Executive	2013	30-Jun-17	a) 206.6 b) 24.5	279.5	a) 200.4 b) 22.2	a) 16.7 b) 19.4	Andrew Forrest (Chair), Nicola Forrest, Herbert Elliott, Grace Forrest, Tony Grist, Malcolm McCusker, Tonya McCusker, Allan Myers.	Fighting modern slavery; ending Indigenous disadvantage; ensuring all children in Australia thrive by five; strengthening arts, culture and community; and attracting the world's best minds to Western Australia
3	↑	Stan Perron Charitable Trust	Mr Stan Perron Director	1978	30-Jun-17	a) 6.4 b) 5.6	18.6	a) 4.4 b) 4.0	a) 4.4 b) 4.0	Lloyd Perron, Elizabeth Perron, Ross Ledger, Steven Carulli.	Grants to medical research, hospital services and rehabilitation activities
4	—	Perth Children's Hospital Foundation	Mr Carrick Robinson Chief Executive	1998	30-Jun-17	a) 8.0 b) 18.5	36.8	a) 4.3 b) 10.4	a) 4.0 b) 5.1	Ian Campbell (Chair), Philip Aylward, Steve Carulli, Colin Edwards, Russell Garvey, Sylvia Lennon, Frank Romano, Ian Shepherd, Sharon Warburton.	Main fundraising body for the Perth Children's Hospital as well as the wider child and adolescent health service in Western Australia
5	↑	Royal Perth Hospital Medical Research Foundation Incorporated	Ms Jocelyn Young Chief Executive	1983	30-Jun-17	a) 6.7 b) 7.3	74.3	a) 0.9 b) 1.9	a) 2.8 b) 3.4	Lyn Beazley, Lawrie Beilin, John Palermo, Aresh Anwar, David Cox, Jocelyn Young, Daniel Fatovich, Graham Hillis	Fundraising activities, donations and bequests for medical research, with outcomes regularly reviewed by medical specialists
6	↑	Rinehart Family Medical Foundation	Mr Jay Newby Chair	1992	30-Jun-17	a) 6.8 b) 55.8	72.9	a) 0.0 b) 50	a) 2.7 b) 2.7	Jay Newby (Chair), Jabez Huang.	Fundraising for public health initiatives
7	↓	McCusker Charitable Foundation	Mr Malcolm McCusker Chairman	2017	30-Jun-17	NFP	NFP	NFP	a) 2.6 b) N/A	Malcolm McCusker, Carolyn McCusker, Tonya McCusker, Denis Reynolds, Mark Bellini.	Improving health and education, with particular emphasis on Western Australia
8	↑	St John of God Foundation	Mr Nick Harvey Chief Executive	1994	30-Jun-17	a) 2.0 b) 1.9	1	a) 2.0 b) 1.9	a) 1.5 b) 1.9	Michael Stanford (Chair), Tracey Burton, John Fogarty, L Henderson, Larissa Johnstone, Bryan Pyne.	Fundraising for St John of God Health Care and its associated entities for major capital projects, as well as social outreach and advocacy initiatives
9	↑	Riverview Trust	Mr Christopher Cline Chief Executive	2004	31-Dec-16	a) 1.4 b) 1.5	0.3	a) 1.4 b) 1.5	a) 1.3 b) 1.4	Haydn Nelson, John Sharpe, Dorcas White, Stephen Kaufman, Brian Harris, Aaron Gregory.	Riverview Trust makes trust distributions to eligible charities
10	↑	Australian Lions Foundation	Mr Ian Kelly Deputy Chairman	1983	31-Dec-16	a) 1.3 b) 1.1	5.3	a) 1.3 b) 1.0	a) 1.2 b) 1.6	Glenn Herbert, Ian Kelly, Ken Hallam, David Triffett, Tony Benbow, Ken Wilcox.	Support Lions Club community projects within Australia and financially support clubs helping victims impacted by natural disasters in Australia
11	↑	Bravery Trust	Mr Peter Fitzpatrick Chairman	2012	30-Jun-17	a) 1.6 b) 4.3	20.1	a) 1.1 b) 3.8	a) 1.1 b) 0.8	Peter Fitzpatrick, Jane McAloon, Bob Cronin	Providing financial assistance to ADF members, veterans and their families who have been affected by an illness or injury as a result of their service, and providing education bursaries to ADF members, veterans and their families
12	↑	Bass Family Foundation	Mr Charlie Bass Founder	2006	30-Jun-17	a) 1.8 b) 1.2	20.7	a) 0.0 b) 0.0	a) 1.0 b) 1.0	Charles Bass, Frank Del Borrello, Brett Rowe.	Distributes funds to a number of organisations
13	↑	Bankwest Foundation	Mr Craig Spencer Executive Manager	2013	30-Jun-17	a) 1.0 b) 1.1	1.3	a) 1.0 b) 1.0	a) 1.0 b) 1.0		Improving the health, welfare and well being of the community
14	↓	Torchbearers For Legacy in Western Australia	Mr Pat Hall Chairman	1953	30-Sep-17	a) 1.0 b) 1.1	0.2	a) 0.5 b) 0.5	a) 0.8 b) 1.7	Patrick Hall (Chair), John Scott, Ian Figueiredo, Eldon George, Sophie McDowell, James Ford, Peter Heeney, Marlene Robbins, Kim Doherty, Trevor Gunning, Ian McNee, Ian Cooke, Arthur Peters, Robert Ratkovic	Support the families of deceased and incapacitated veterans of the ADF
15	↑	Murdoch University Foundation	Ms Alison Gaines Chair	2002	31-Dec-16	a) 1.5 b) 0.8	9.2	a) 0.4 b) 0.6	a) 0.8 b) 0.8		Fundraising and collecting donations from the public to support the activities of Murdoch University





Giving Well

SPECIAL REPORT

BNiQ SEARCH **CHARITY**



There are **812** results from our index of **94,466** articles,
9,354 companies and **32,713** people

Variety Bash takes hits, drives on

22 Feb 2018 by Tori Wilson

Variety- the Children's Charity WA ...

Royal Flying Doctor Service's reputation soars

03 Jan 2018 by Tori Wilson

RFDS has ranked first for the most trusted charity across all categories for the second time. Tori ... charity for the seventh year running in the Charity Reputation Index for 2017, followed by St John ... with the Global Reputation Institute (RI), assessing Australia's 40 largest charities based on ...

Local landlord lends hand

25 Jan 2018 by Tori Wilson

Perth. The women's employment charity will use the space to sort donated clothing, shoes, bags and ...

Charities challenged to measure up

17 Jul 2017 by Katie McDonald

Many charities are struggling to measure outcomes in an increasingly competitive funding environment. ...

Charities cement corporate connections

14 Feb 2017 by Katie McDonald

Tight economic conditions have led the volunteering sector to adapt its practices as demand for services continues to grow. ...

Microfinance sows opportunity

04 Jul 2017 by Katie McDonald

to self-sustaining, WA-founded charity The Foxglove Project is helping women in developing countries ... launched The Foxglove Project charity to work in this space. Her story starts in 2009, when Mrs Chisholm ... (AEE). Having supported and worked with charities across Western Australia her whole life, Mrs Chisholm ...

6 Issues for boards to consider in 2018

08 Dec 2017 by Jody Nunn

6. Non-profit sector The Australian Charities and Not-for-profits Commission (ACNC), which is ... public about its regulatory activities and complaints against charities, and the ACNC's enforcement ...