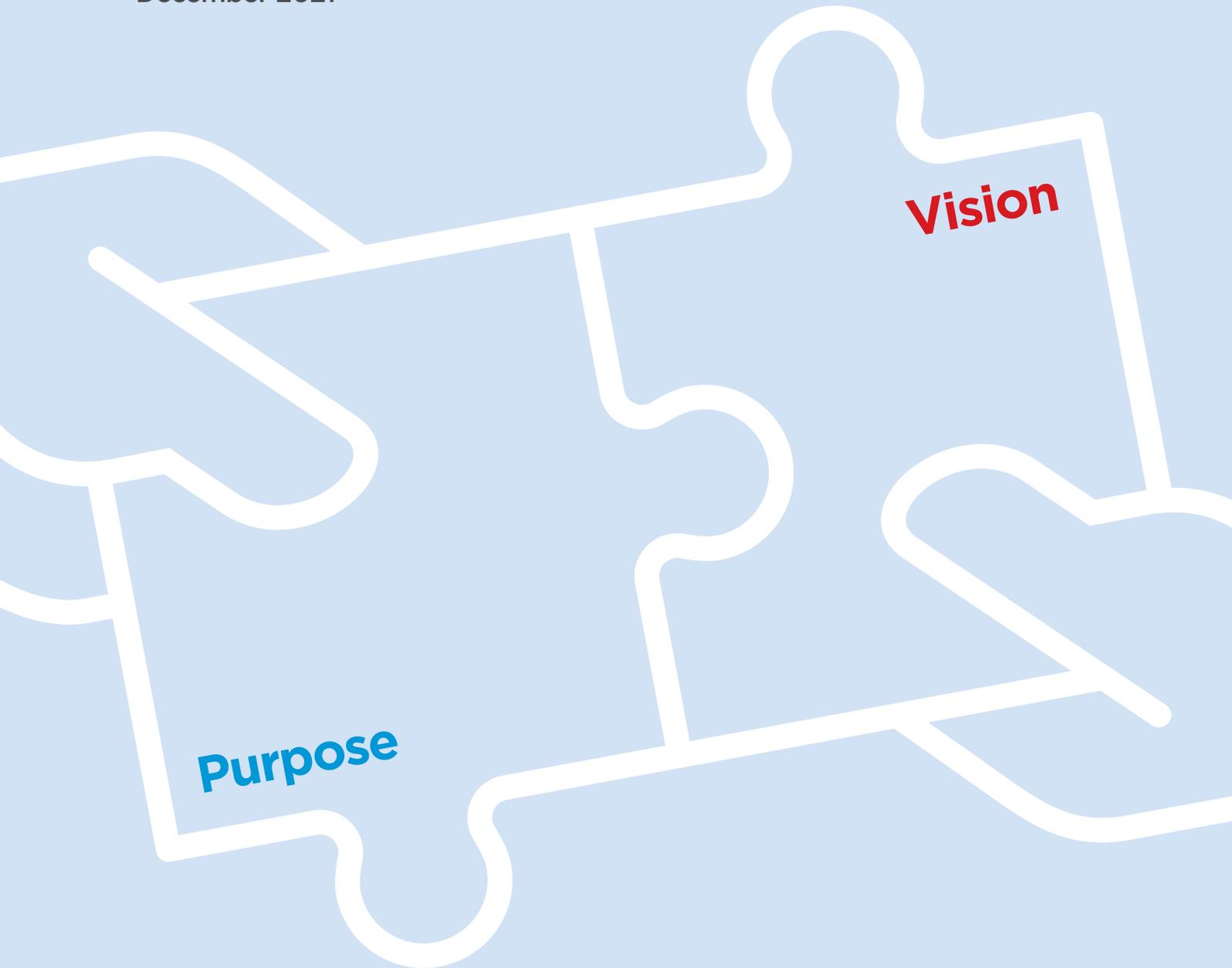




Strategic Plan 2022-2025

December 2021



Purpose

Vision

Vision:

A generous and inclusive Australia

Purpose:

To inspire more and better philanthropy

Our Strategic Plan is underpinned by four key themes: engagement, value, collaboration and technology.

1. Shifting the focus of the organisation from “membership” to “engagement”.
2. Demonstrating the value of philanthropy and growing the number of those who give.
3. Fostering greater collaboration amongst funders and between funders and for-purpose organisations.
4. Harnessing technology, being a knowledge hub to the sector.

Thank you to our many valued members and supporters, the Philanthropy Australia Board and team, and Good Foundations for their input into the development of this strategic plan.

Philanthropy Australia Strategic Plan 2022-2025



ENGAGE

Engage a larger and more diverse audience.

INSPIRE

Inspire a new wave of giving through stories and campaigns.

Key Strategic Initiatives

- + Strengthen and grow our peer networks and chapter groups.
- + Streamline and align our offering for members by stage of giving and interest areas.
- + Build strategic partnerships with peers to share collective experience and engage diverse stakeholders.
- + Support professional advisers to engage with clients on philanthropy as a core service offering.
- + Open up access to more of our content to showcase the depth and breadth of our work.
- + Deliver our national conference, summit, thought leadership events and awards to a larger audience.
- + Connect for-purpose organisations to skilled volunteers from the Philanthropy Australia network.

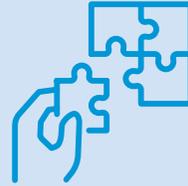
- + Strengthen our brand to position Philanthropy Australia as insightful, inclusive and ambitious.
- + Roll out a suite of campaigns to communicate the story and value of philanthropy
 - champion stories of diverse giving; and
 - leverage the rich and diverse content within the member base.
- + Develop strategies to drive giving by:
 - High Net Worth individuals
 - Ultra-High Net Worth individuals
 - Next generation and new givers across wealth levels; and
 - Under-represented groups.

2025 Goals

- + Diversify membership and grow to 2,000 members.

- + Increase annual structured giving by 50% (to \$3.75bn) by 2025.

Double Structured Giving by 2030



FOSTER

Foster better giving through accessible guidance, tools and information.

- + Provide practical guidance and education on giving to better support funders and for-purpose organisations.
- + Create a suite of tools for funders which are easy to access and cover different stages of the giving journey, new forms of giving and impact investing.
- + Provide timely access to data, information, learnings and knowledge.
- + Create and facilitate opportunities for for-purpose organisations, funders and others to collaborate for systems change.
- + Facilitate professional learning & development for trustees, professional advisers and for-purpose organisations on philanthropy and impact investing.
- + Become a centre of excellence for better giving.

ADVOCATE

Advocate for policy, regulatory and other reform to unlock the potential of giving in Australia.

- + Secure government commitment to work with the philanthropic sector on a National Action Plan to grow philanthropic giving.
- + Protect the current foundations for giving.
- + Enhance giving through DGR reform, facilitating community foundations, allowing excess donations from superannuation, and encouraging legacy giving.
- + Support sector-led action, including initiatives outlined in the Blueprint to Grow Structured Giving.
- + Become a trusted advocate to government on philanthropy.
- + Build a more broad-based understanding in government and across the community of why philanthropy matters.
- + Provide national leadership in advocacy and policy on giving.

INVEST

Invest in our people, processes and systems to create an efficient, effective and sustainable business.

- + Build a compelling employee value proposition to attract and develop a high performing and fulfilled team.
- + Digitise and streamline systems and processes to improve member and staff experience and better utilise data and knowledge.
- + Create a digital-first mindset within Philanthropy Australia.
- + Develop and execute a Reconciliation Action Plan to deepen engagement with Aboriginal and Torres Strait Islander peoples.
- + Increase self-generated revenue and minimise our environmental footprint.
- + Secure multi-year, long-term funding partnerships to invest in people and technology.
- + Achieve financial sustainability and be an employer of choice.

Double Structured Giving by 2030

A roadmap to a generous and inclusive Australia

The 2022-2025 Philanthropy Australia Strategic Plan sets an ambitious growth agenda to inspire more and better philanthropy across Australia for the benefit of humanity.

Our vision is for a generous and inclusive Australia.

We launch our new strategic plan into a radically changed world to the one of just a few years ago. Following the impact of the Black Summer fires in 2019-2020 and the global COVID-19 pandemic, we now find ourselves in a social, economic and environmental landscape experiencing tectonic shifts – life is increasingly uncertain, and our planet is under greater threat. In these challenging times, the role of enlightened philanthropy is more important than ever before.

Through extensive consultation with our members, partners and the sector, we have landed on five key strategic pillars to guide our work over the next four years.

We will **engage** with a larger and more diverse audience as we build out the wider Philanthropy Australia network and extend our member base. We will **inspire** and cultivate a new wave of philanthropy through inspirational stories and campaigns that illuminate the importance and joy of giving. We will **foster** more and better giving through accessible guidance, tools and information. We will **advocate** for policy, regulatory and other reform to unlock the enormous potential for giving in Australia. And we will **invest** in our organisation – in our people, our processes and our systems – to ensure an efficient and effective business framework that exceeds our members' expectations and sustains the organisation for the long term.

Importantly, the priorities identified in our Strategic Plan support the implementation of our Blueprint to Grow Structured Giving, a national framework to double structured giving from \$2.5 billion to \$5 billion annually by 2030. The Strategic Plan seeks to ensure that a good portion of the anticipated \$1.1 trillion transfer in intergenerational wealth in Australia by 2030 is directed to philanthropic endeavours that change systems and lives. Working with government to open up more giving is a key focus of the Strategic Plan.

As the peak body for philanthropy in Australia, we know that there has never been a more critical time to grow and nurture giving.

This Strategic Plan charts a course in that endeavour over the next four years. We are so looking forward to embarking on this new chapter of our journey with you to inspire more and better philanthropy.



Jack Heath
CEO



Amanda Miller
Co-Chair



Ann Johnson
Co-Chair

Philanthropy Australia

We acknowledge and pay our respects to the past, present and emerging traditional Custodians and Elders of the country on which we work. We also accept the invitation in the Uluru Statement from the Heart to walk together with Aboriginal and Torres Strait Islander peoples in a movement of the Australian people for a better future.



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