

**PHILANTHROPY
AUSTRALIA**

2024 Study Tour

Philanthropy Australia Study Tour 2024

London, UK, November 2024



You are invited to join the 2024 Philanthropy Australia Study Tour in November to London.

The UK has long been a leader in philanthropy, social enterprise and impact investing. The Study Tour is a unique opportunity for Philanthropy Australia's funder members to connect and learn from global leaders. Participants will hear from a range of leading foundations, impact investors and thought leaders, broaden their international network and form lifelong bonds with their Australian peers on the tour.

The Tour will commence on the afternoon of Tuesday 19 November and finish on Monday 25 November in London. This will be followed by optional attendance at the [Impact Europe Summit](#), in Bilbao, Spain from Wednesday 27 November to Friday 29 November 2024.

We hope you can join us!

You're invited to apply

You are invited to submit an application form if you would like to participate in the Study Tour by Monday 27 May 2024. Upon acceptance, applicants are requested to pay a AUD\$1,500 + GST deposit, within two weeks, to secure their spot in the delegation. The outstanding fee will be due by 31 July 2024.

[Apply here](#)

Please note the information in this document is accurate as at 1 May 2024, but is subject to change.

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Dates

Date		
Tues 19 November	Day 1	Participants will meet in the afternoon for a briefing session followed by a welcome dinner
Wed 20 November	Day 2	Study Tour, London
Thurs 21 November	Day 3	Study Tour, London
Fri 22 November	Day 4	Study Tour, London including site visits
Sat 23 November		Free time
Sun 24 November		Free time
Mon 25 November	Day 5	Final day of the Tour, finish at midday
Tues 26 November		Optional: Travel to Bilbao (for those attending the Summit)
Wed 27 November		Optional: Day 1 Impact Europe Summit
Thurs 28 November		Optional: Day 2 Impact Europe Summit
Fri 29 November		Optional: Day 3 Impact Europe Summit, Tour ends

More information is provided overleaf on the organisations we will be meeting

Costs

The cost of the Tour will be AUD\$3,900 + GST.

Costs cover:

- A five-day inspiring and immersive program of fully facilitated presentations, roundtables and field trips.
- Networking dinners on Tues 19, Wed 20 and Thurs 21 November and lunch on Mon 25 November.
- Transport between sessions.

Costs do not cover:

- Accommodation, airfares, visas and travel insurance.
- Impact Europe Summit tickets (please note attendance of the Summit is optional). The Summit will cost EUR 900 to attend (discounted from EUR 1.400 full ticket price).
- Participants are also asked to allow for other on the ground costs such as breakfasts and lunches. Dinners are only included over the Study Tour dates mentioned above.

Flights

We ask that you arrange your own flights to arrive in London in time for an in-country briefing on the afternoon of Tuesday 19 November.

Key dates

27 May 2024: Deadline for completing the application form ([Apply here](#))

Two weeks from acceptance: Non-refundable deposit of AUD\$1,500 + GST due

31 July 2024: Outstanding balance of AUD\$2,400 + GST due

16 October 2024: Participant briefing (in person at Philanthropy Australia office in Darlinghurst, Sydney, or online)

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Please note the speakers are subject to change.

Speakers

We are finalising the detailed itinerary for the tour, and will confirm this nearer the time. Some of the speakers and organisations we will be hearing from include:



Rhodri Davies, Why Philanthropy Matters: As the founder of “Why Philanthropy Matters,” Rhodri Davies is a thought leader in the UK, providing invaluable insights into the significance of philanthropy in addressing pressing global challenges. His expertise lies in elucidating the evolving landscape of giving, highlighting emerging trends, and promoting effective philanthropic practices.



Fozia Irfan OBE, BBC Children in Need: Fozia is the Director of Impact and Influence at BBC Children in Need as well as Chair of 360 Giving. Fozia has also completed a Churchill Fellowship that resulted in the report “Transformative Philanthropy”. Fozia was also previously CEO of a small community foundation transforming it into one of the largest nationally including becoming the most high-profile community foundation in the UK.



Tris Lumley, New Philanthropy Capital (NPC): Tris is NPC’s Director of Innovation and Development. Tris leads NPC’s development of new strategies, partnerships and initiatives to help transform the social sector to focus on and deliver greater impact, working with partners both in the UK and internationally. Tris has a particular interest in the potential of truly open approaches in the social sector. Open knowledge. Open data. Open evaluation. Open research. Open philanthropy.



Lena Baumgartner: Lena is an expert on the pooled fund model (giving circle) in the UK and led the UK Democracy Fund – a pooled Fund set up by the Joseph Rowntree Reform Trust (JRRT) in 2019 and is supported by a group of committed funders. Independent and non-partisan, the Fund is helping build a healthy democracy – one in which everyone can participate and where political power is shared fairly. The Fund addresses the challenge of funding democratic participation and tackling political inequality.



Amy Braier, Director, The Pears Foundation: The Pears Foundation is a family foundation driven by a desire to demonstrate the good that philanthropy can achieve in the world. The Pears family has given more than £450m to charity since the Foundation was established. The foundation has earned a reputation for its strategic approach to philanthropy: prioritising collaboration, innovation, and sustainability in its grantmaking efforts. The foundation gives core funding, to long-term partners.



Husna Mortuza, Associate Director Public Engagement, Joseph Rowntree Foundation (JRF): JRF was established over a century ago by Joseph Rowntree, to help understand the root causes of poverty. JRF supports and undertakes many different types of work including policy development and insight gathering, advocacy and campaigns, impact investment, funding pioneers and visionaries, field building, and supporting those building grassroots movements. They use a three-part framework for categorising the different kinds of contribution that these strands of work make to their mission: directional change, systemic change and infrastructure for change.

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Neil Berry, Director of Programs, Access – the Foundation for Social Investment: Access is dedicated to unlocking the potential of social enterprises and charities by providing them with the necessary financial resources, expertise, and support. As a leading advocate for social investment, Access works to bridge the gap between traditional grant funding and commercial investment, enabling social sector organisations to access the capital they need to grow, scale, and maximise their impact. Access empowers organisations to pursue sustainable business models while staying true to their social missions. In addition to financial support, Access offers a range of capacity-building services, including training, mentoring, and strategic advice, to help organisations strengthen their operational capabilities and become more resilient and effective in achieving their social objectives.



David Cutler, Director, Baring Foundation: with a mission to promote social justice and advance human rights, the Baring Foundation focuses on supporting initiatives that address issues of inequality, discrimination, and marginalisation both in the UK and internationally. The foundation is known for its strategic grant-making approach, funding projects and organisations that work to empower marginalised communities and amplify diverse voices. Key areas of focus include arts and creativity, mental health, and strengthening civil society. The majority of the foundation's work is in collaboration with other funders including government.



Steph Taylor, CEO, Leeds Community Foundation: a Community Foundation dedicated to making a positive impact in the city of Leeds. With a focus on grassroots projects and charitable causes, the foundation provides funding, expertise, and resources to a diverse range of organisations across various sectors, including education, health, environment, arts, and social welfare. The foundation focuses on shifting the power imbalance, with all of its grants made with different methods of participatory grantmaking.



Rob, Williamson OBE DL, CEO, Community Foundation Tyne & Wear and Northumberland: The Community Foundation Tyne & Wear and Northumberland is the UK's largest community foundation ranked by size of endowment. Similar to the Leeds Community Foundation, the foundation disburses a lot of its funding in a variety of participatory methods. The foundation also provides philanthropy advice and donor education to funders in the North East of England.



Sarah Hedley & Jonny Page, Head of Social and Impact Investment, Esmée Fairbairn Foundation: The Esmée Fairbairn Foundation is one of the UK's largest independent funders. In 2023, it provided £58m in funding towards a wide range of work in support of its three main aims: to improve Our Natural World, secure A Fairer Future and nurture Creative, Confident Communities. It has also has a £45m allocation to social investments and a £10m allocation to impact investments. The foundation takes an impact-first approach to social investment, shaping investment to support its aims. The foundation starts with the social or environmental need and tailors the investment: offering complete flexibility to adapt existing products, create a bespoke instrument, or use multiple products in combination. As well as making direct investments into organisations seeking to create impact towards its aims, its also invests into impact funds, which are managed by other social investors.



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Your Philanthropy Australia hosts



Maree Sidey, incoming CEO, Philanthropy Australia

Maree joins PA after nine successful years as CEO of Australian Communities Foundation (ACF), Australia's only nationally-focused community foundation. Maree is a passionate For Purpose/Social Business leader and social change advocate, a specialist in strategy, advocacy, communication, and transformative change. She is an experienced CEO with an outstanding reputation for leading purpose driven organisations in Australia. She has also held Non-Executive Director roles at Community Foundations of Australia, Australian Progress, Philanthropy Australia and Confident Girls Foundation.

Maree joined ACF as Chief Executive Officer in 2015, and in that time has transformed the organisation to a premier provider of philanthropic services and an influential advocate for social and environmental change in Australia.



Rachel Findlay, Director of Impact & Engagement (NSW & ACT)

Rachel has been working with philanthropists and funders both in Australia and the UK for more than 10 years. Prior to Philanthropy Australia, Rachel was at Australian Philanthropic Services (APS) where she advised clients on all elements of their giving including strategy development, charity analysis and social sector research. Rachel has also worked at Social Ventures Australia (SVA), the Social Impact Hub and headed up New Philanthropy Capital's (NPC) Funder Effectiveness team in the UK. Rachel is a Chartered Accountant (ACA) having started her career at PricewaterhouseCoopers.

E: rachel@philanthropy.org.au

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Testimonials

from previous Study Tours

"You cannot underestimate the value of taking time out away from your day-to-day work to embark on a study tour with a group of like-minded but diverse individuals – incredibly stimulating and an enormous privilege"

"What an amazing stimulating, exciting and enjoyable study tour Philanthropy Australia put together for us. Your excellent organisational skills, forethought and hard work all paid off. It was a great experience for me, to also share the learnings and the trip with our CEO..."

"I **can not** speak highly enough about my experience on the Study Tour.

The tour provided me with a strong insight into the broader philanthropic space, provided the opportunity to make lifelong connections with both the other tour members and organisations we met with, and finally clarified my future career direction as well as the future direction of our foundation.

"Philanthropy is only one of the hats I wear.

To have the opportunity to immerse myself to the exclusion of all else in learning about best practice approaches to achieving social change with a group of like-minded individuals was an incredibly enriching and inspiring experience".

"Great group of young Australians coming together with a common view of the world.

The tour facilitated the gaps in my knowledge and gave me a platform to promote philanthropy in Australia and bounce ideas with like-minded people".

"The Study Tour was a such wonderful experience – the connections made and the conversations had were powerful and lasting

Thanks for the opportunity, Philanthropy Australia"

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FAQs

Who is the Tour for?

The tour is for trustees, staff and family members of philanthropic foundations. Foundations are invited to send two participants to ensure shared learnings that can be thoughtfully applied to practice on return. Participants are required to be members of Philanthropy Australia.

How many participants will be attending?

The tour is capped at 20 participants.

What sorts of experiences will participants have?

The Tour will include presentations, roundtables, facilitated sessions and site visits with leading individuals and organisations.

How will Philanthropy Australia support participants?

Philanthropy Australia is well placed to facilitate the meetings and engagements taking place on the study tour because of our experience in leading more than six tours of this kind since 2013.

We are committed to ensuring participants get the most out of the trip. We will be providing you with background reading on the organisations and leaders we will meet, and some contextual material and the philanthropic landscape in the UK. During the tour we will provide detailed daily plans on tour plus session summaries to all participants to ensure key takeaways from engagements are captured. Participants will also be able to share their experiences and reflections with other members afterwards.

Who is Impact Europe?

Previously known as the European Venture Philanthropy Association (EVPA), Impact Europe is a unique network of impact capital providers along the full continuum of capital (foundations, impact funds, banks and financial institutions, corporate impact actors, public funders).

What is the Impact Europe Summit?

The Impact Europe Summit is known as 'Impact Week'. Impact Week is a unique opportunity for the global community of changemakers across the full spectrum of capital, from grants to impact investing, to encounter cutting-edge ideas, discover new trends and engage with partners, old and new, to maximise their impact for people and the planet. A short video with 2022 Impact week highlights can be found here: [Impact Week 2022](#). More information on the [2024 Summit](#) will be available shortly.

How much does it cost to attend the Impact Europe Summit/ how do I register?

We have secured the partner rate of EUR 900 (discounted from EUR 1.400) for the Summit.



Further questions?

Please reach out to Rachel.

Rachel Findlay

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