



**LORD  
MAYOR'S  
CHARITABLE  
FOUNDATION**

Strategic community  
giving since 1923

# STRATEGIC PLAN

2019 – 2023

Maximising impact  
Inspiring Philanthropy

## We exist for:

- A resilient and inclusive Melbourne.
- Inspiring Philanthropy.

## Our purpose:

- To identify and scale solutions that address Melbourne's big social and environmental challenges.
- To inspire current and legacy giving through donor advised and collaborative philanthropy.

## Our Approach:

- To support innovative and effective models.
- To build a strong for-purpose sector.
- To convene and participate in impactful collaborations and networks.
- To work at a systems level on the biggest challenges.
- To partner with our donors to achieve their philanthropic goals.

## Our Initiatives:

- Strengthening Community Resilience
- Affordable Housing Challenge II
- Clean Technology Powerhouse (Bushfire and COVID-19 Response – recovery phases)
- Climate Safe Homes (follow on from Energy Efficiency & Climate Resilience Initiative in 2019 and 2020)
- Inclusive Climate Economy

## Our Values:

- **ACCOUNTABLE**  
We are accountable to our donors.
- **BRAVE**  
We believe in philanthropy's role in supporting the testing of new ideas and demonstrating innovative solutions.
- **COLLABORATIVE**  
We work as a team internally and understand the added value of working collaboratively with diverse partners.
- **CREATIVE**  
We learn from what we do and fund.
- **ETHICAL**  
We apply an ethical lens to our granting and investments.
- **RELEVANT**  
We use research and learning to make sure we are funding and working on issues that are relevant to the community today.
- **RESPECTFUL**  
We respect difference within our team and within our community.

## Our Impact Areas:



**Education  
& Employment**



**Environment  
& Sustainability**



**Healthy & Resilient  
Communities**

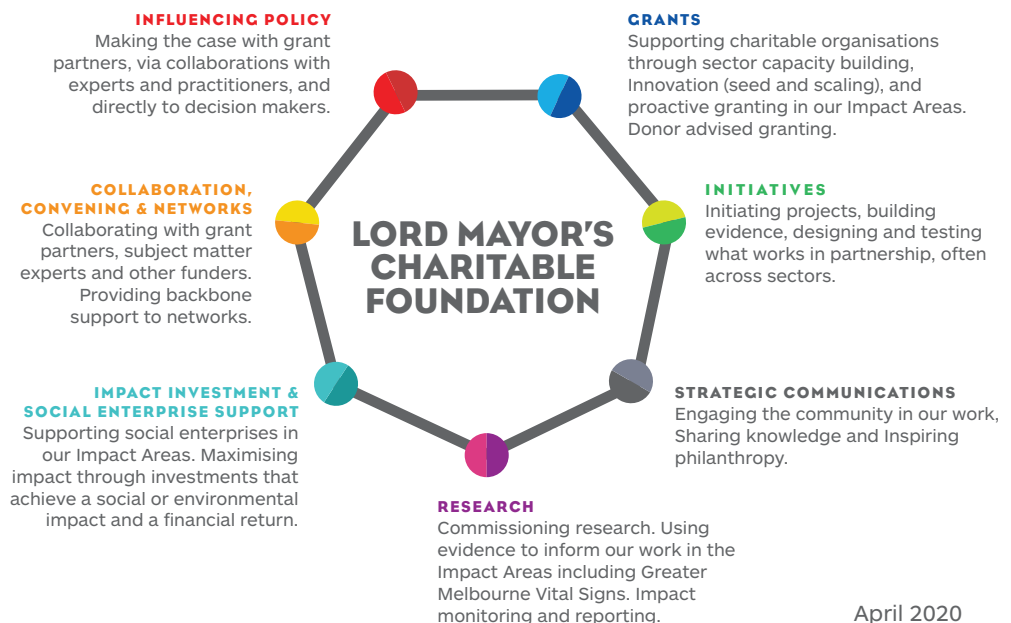


**Homelessness &  
Affordable Housing**



**Inspiring  
Philanthropy**

## Philanthropy Tool Box



## Our Strategic Context

**As an independent community foundation our purpose is to address the big issues of the day facing our community. This was Sir John Swanson's approach when he established the Lord Mayor's Fund for Metropolitan Hospitals and Charities in 1923. Sir John's vision was for the first campaign to raise funds to enable financially disadvantaged servicemen and servicewomen returning from WWI to obtain urgently needed medical and rehabilitation services from Melbourne's public hospitals.**

Today, Lord Mayor's Charitable Foundation undertakes the Greater Melbourne Vital Signs research report every three years to identify the things to celebrate and the things to improve in Melbourne. While Melbourne has been repeatedly found to be one of the worlds' most liveable cities, this is not the case for everyone.

In addition to the findings of *Greater Melbourne Vital Signs 2017*, in order to further understand the needs of the community for this Strategic Plan, we undertook a review of our Impact Areas, especially the priority issues within them. Spark Strategy also carried out interviews with 40 stakeholders and undertook a scan of the community issues being supported by other foundations.

The Impact Areas outlined in this Strategic Plan demonstrate that homelessness and the lack of supply of affordable housing remain big issues.

Reducing carbon emissions from energy use, especially within low income groups, preserving Melbourne's food

bowl and healthy waterways, and preparing for heatwaves and increasing natural disasters, are also critical issues. Increasing discrimination and inequality are both concerns, and our responses to these challenges are reflected in the priorities within our Healthy & Resilient Communities and Education & Employment Impact Areas.

We aim to take a system change approach to some of these big issues in collaboration with others in the for purpose, research, government and other sectors. We support networks and partnerships between organisations and will continue to do this. We believe partnerships are vital to achieving game-changing and sustained impact. We are committed to investing in innovation and supporting charitable organisations to test new ideas about potential solutions to the big issues we face.

Community foundations are growing rapidly around the world. There are more than 1800 foundations globally. The role of community foundations is increasingly moving beyond grantmaking to include convening partnerships and collaborations, capacity building, research and knowledge sharing, and policy work with partners. We too are extending our use of the full philanthropy tool box.

We will be using all the tools in the philanthropy tool box to make an impact on these challenges at both a program and systems change level. We will engage with our donors to work in our Impact Areas and other philanthropic areas of interest.

## Some Key Challenges

**Data from *Greater Melbourne Vital Signs 2017* (Imcf.org.au) led to us doubling down on our work in affordable housing, climate resilience and inclusion in this Strategic Plan. Some examples:**

**The challenge: Reducing the number of older women experiencing homelessness.**

**Older women and homelessness:** Between 2012 and 2017, the number of older women 'couch surfing' increased by 83 per cent. There was also a 75 per cent increase in older women sleeping in cars presenting at homelessness services. (*Hidden Homelessness on the Rise*, Council to Homeless Persons, Aug 2017)

**Our response: Homelessness & Affordable Housing Grants and Affordable Housing Challenge Initiative.**

**The challenge: Reducing temperature related health impacts, carbon emissions and energy costs in vulnerable households.**

**Energy efficiency and housing:** The average energy efficiency rating for houses constructed in Victoria before 2005 is 1.81 stars. This includes vulnerable households. (*The Victorian Households Energy Report, Sustainability Victoria, May 2014*)

**Our response: Energy Efficiency & Climate Resilience in Vulnerable Households Initiative and Grants.**

**The challenge: Reducing discrimination.**

**Discrimination based on skin colour, ethnic origin or religion has increased.** 20 per cent of people reported experiencing discrimination, up from 15 per cent in 2015. (*Mapping Social Cohesion, The Scanlon Foundation & Monash University, 2016*).

**Our response: Healthy & Resilient Communities Grants and Education. & Employment Grants.**

## Our Targets



1,000 jobs or employment pathways created.



By 2023, 1,000 vulnerable households have received upgrades to reduce health impacts, utility costs and greenhouse gas emissions and are supported at times of temperature related risk.



By 2023, there is government commitment to increase the minimum mandatory energy efficiency requirements of new houses to at least 7 stars, which will benefit 51 per cent of all housing stock in 2050.



In 10 communities best practice collaborative extreme weather and disaster resilience plans developed.



50 per cent reduction in the proportion of people experiencing discrimination based on race, ethnicity and religion.



Five new homelessness prevention pathways created for vulnerable groups, especially older women and young people.



By 2023, 500 affordable housing units built.

## Our Strategic Objectives

Maximise the impact of our philanthropy. Grow community philanthropy.

## Our Impact Areas

Our grants and initiatives are working to address the following goals:



### Inspiring Philanthropy Outcomes

1. Increased community philanthropy including donor advised grants.
2. Strategic support of the philanthropic sector.
3. Strengthened charitable sector.
4. Increased support of impact investment, social enterprises and intermediaries.
5. Community Needs Research.

### United Nations Sustainable Development Goal



**Education & Employment**

**Environment & Sustainability**






**Healthy & Resilient Communities**

**Homelessness & Affordable Housing**

**Inspiring Philanthropy**

## Impact Initiatives 2019/20

Each year, the Foundation leads a small number of key Initiatives. In the coming year, these are our priorities.

Initiative Description	Contribution to Impact Area Outcomes
<b>I. DONOR ENGAGEMENT</b>	
<p><b>1.1 COVID-19 Community Resilience Giving Account</b> Establish a flow through giving account to provide the ability to fund a project or area of concern immediately. Given current circumstances the giving account will focus on COVID-19 Community Resilience.</p> <p>The projects supported through the Giving Account will demonstrate the Foundation's nimble and strategic approach to philanthropy and promote the benefits of giving through the Foundation, including bequests.</p>	<p><b>Healthy &amp; Resilient Communities</b>  <b>Outcome 1</b> Increased funds to support Strengthening community resilience to pandemics, extreme weather, bushfires and other disasters.</p> <p><b>Inspiring Philanthropy</b>  <b>Outcome 1</b> Increased community philanthropy.</p>
<p><b>1.2 Together Campaign</b> Implement a new donor engagement campaign that promotes the benefits of strategic and impactful philanthropy.</p>	<p><b>Inspiring Philanthropy</b>  <b>Outcome 1</b> Increased community philanthropy including donor advised grants.</p>
<b>2. INITIATIVES</b>	
<b>2.1 Healthy &amp; Resilient Communities – Strengthening Community Resilience</b>	
<p>1. Community Resilience Centre The current context of COVID-19 coupled with the ongoing recovery needs of communities affected by the Black Summer bushfires presents an important opportunity to develop, consolidate and scale community-led resilience building practice in Victoria. This Initiative will support the establishment of an independent, charitable entity that strategically builds community resilience to disasters (chronic stresses, acute shocks and major emergencies) and readiness for the increase in and compounding nature of these events, with many being attributed to climate change. It will build on existing collaborations.</p> <p>2. Hot Spots Scaling-Up With three Hot Spots projects being formally evaluated the outcomes will inform a scaled-up community resilience/health and climate change initiative in 2020/21. There is potential for this initiative to merge with the Community Resilience Centre initiative, overlap with the Energy Efficiency initiative within the Environment and Sustainability impact area, as well as the work of other funded organisations including the Climate and Health Alliance (CAHA).</p>	<p><b>Healthy &amp; Resilient Communities</b>  <b>Outcome 1</b> Increased cross sector collaborations strengthening community resilience to extreme weather, pandemics, bushfires and other disasters.</p> <p> <b>Outcome 2</b> Increased capacity of health organisations to understand and respond to the health impacts of pandemics and climate change.</p>
<b>2.2 Homelessness &amp; Affordable Housing – Affordable Housing Challenge II</b>	
<p>The Affordable Housing Challenge is an initiative of the Foundation that seeks to increase the supply of quality affordable housing by encouraging land holders to develop underutilised land.</p> <p>The Affordable Housing Challenge II will focus on not-for-profit land holders, including churches, to demonstrate a replicable model of affordable housing innovation. This will follow similar model to Affordable Housing Challenge 1 where the Foundation leveraged a grant alongside a site to catalyse more than 40 additional units of quality affordable housing.</p>	<p><b>Homelessness &amp; Affordable Housing</b>  <b>Outcome 1</b> Increased supply of quality affordable housing.</p>
<b>2.3 Environment &amp; Sustainability – Clean Technology Powerhouse (Bushfire and COVID-19 Response – recovery phases)</b>	
<p>Strategic communication initiative that encourages broad public support for climate action. The focus on the Initiative will be on the economic and employment opportunities associated with Australia's transition to zero emissions, including: Increased public understanding of the employment and economic benefits involved with the transition to zero emissions; clean technology export opportunities, including clean hydrogen, Asian grid connections, renewable fueled products and monetised carbon sequestration activities; the role these exports could play in Australia's energy transition, rather than a domestic transition alone; and the increased role Australia could play reducing global emissions through export opportunities.</p>	<p><b>Environment &amp; Sustainability</b>  <b>Outcome 2</b> Increased public understanding of the climate challenge.</p> <p>In addition, <b>Education &amp; Employment</b>  <b>Outcome 1</b> Increased economic inclusion, resilience and workforce adaptability.</p>
<b>2.4 Environment &amp; Sustainability – Climate Safe Homes (follow on from Energy Efficiency &amp; Climate Resilience Initiative in 2019 and 2020)</b>	
<p>Climate Safe Homes Energy efficiency and climate resilience upgrades to reduce temperature related impacts, energy poverty and emissions in vulnerable households.</p> <p>Collaboration with Brotherhood of St Laurence, St Vincent's Hospital, and other service providers with energy efficiency advisors. Upgrades could include installation of solar, efficient heating/cooling, insulation and other measures in households, as well as targeted selection of at-risk individuals through health care providers, increased service provision and activation of family/social networks.</p>	<p><b>Environment &amp; Sustainability</b>  <b>Outcome 1</b> Increased energy efficiency and climate resilience of vulnerable households.</p>
<b>2.5 Education &amp; Employment – Inclusive Climate Economy</b>	
<p>The Initiative will focus on the economic and employment challenges and opportunities presented by Australia's transition to a zero-carbon economy. There will be a focus on how this transition will affect disadvantaged communities and workers, particularly in Greater Melbourne and surrounds.</p> <p>As Australia travels through and emerges from the current pandemic crisis, there is an opportunity to leverage Government stimulus to bring forward a Just Transition. A transition guided by a vision of a resilient, inclusive and clean Australian economy that delivers opportunities for all Australians.</p>	<p><b>Education &amp; Employment</b>  <b>Outcome 1</b> Increased economic inclusion, resilience and workforce adaptability.</p>