



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:

- Resilient & Inclusive Melbourne
- Affordable Housing Challenge
- Energy Efficiency & Climate Resilience in Vulnerable Households
- Hot Spots
- Impact Evaluation
- Collaborative Philanthropy

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

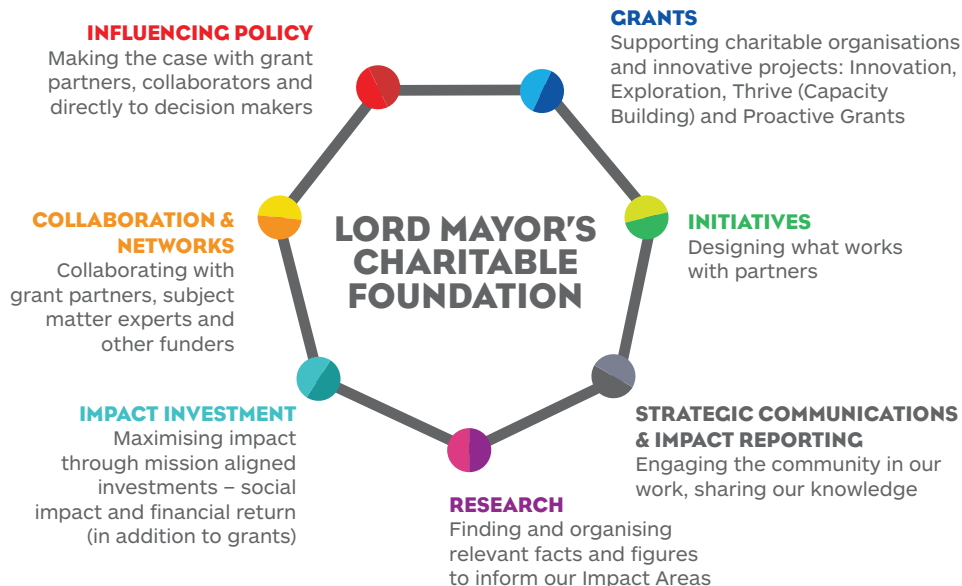


Homelessness & Affordable Housing



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:

 Education & Employment Reduce education and economic inequality	 Environment & Sustainability Reduced urban impacts on the natural environment	 Healthy & Resilient Communities Increased community resilience to withstand major social and health challenges	 Homelessness & Affordable Housing Alleviate homelessness	 Inspiring Philanthropy Grow philanthropy Strengthen the charitable sector
Outcomes	Outcomes	Outcomes	Outcomes	Outcomes
<ol style="list-style-type: none"> 1. Reduced current and emerging skills and capabilities gaps to improve life and work readiness. 2. Increased economic inclusion, resilience and workforce adaptability. 	<ol style="list-style-type: none"> 1. Increased energy efficiency and climate resilience of vulnerable households. 2. Increased public understanding of the climate challenge. 3. Secure, healthy and sustainable food systems. 4. Protected and rehabilitated aquatic eco-systems. 	<ol style="list-style-type: none"> 1. Increased cross-sector collaborations strengthening community resilience to extreme weather and disasters. 2. Increased capacity of health organisations to respond to the health impacts of climate change. 3. Reduced discrimination and inequality that undermine resilience. 	<ol style="list-style-type: none"> 1. Increased supply of quality affordable housing. 2. Interventions that prevent entry into or entrenchment in homelessness. 	<ol style="list-style-type: none"> 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 and social enterprises intermediaries. 5. Community Needs Research.

United Nations Sustainable Development Goals



United Nations Sustainable Development Goals



United Nations Sustainable Development Goals



United Nations Sustainable Development Goals



United Nations Sustainable Development Goal



Impact Initiatives 2019/20

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

Initiative		Impact Areas
Affordable Housing Challenge	Building on the Foundation's long-term commitment to preventing homelessness and increasing the supply of affordable housing, the Foundation will continue the Affordable Housing Challenge initiative begun in 2017/18. Following the development of site selection criteria and best practice sustainable affordable housing assessment criteria, the first Challenge project took place in 2018/19 at a site in the City of Darebin. The next challenge is likely to be in partnership with an inner Melbourne local government.	Homelessness & Affordable Housing Secondary Impact Areas: Environment & Sustainability Education & Employment
Energy Efficiency & Climate Resilience in Vulnerable Households	To increase the energy efficiency and climate resilience of vulnerable households, the Foundation will continue its work through important partnerships with Renew, Brotherhood of St Laurence, University of Technology Sydney and Community Housing Industry Association. This will include the development of an innovative new retrofit program and targeted assistance to 200 Aboriginal Housing Victoria and Aboriginal Cooperative sites throughout Victoria.	Environment & Sustainability Secondary Impact Area: Homelessness & Affordable Housing
Hot Spots	Climate change is leading to increased incidence of heatwaves and other natural disasters with significant adverse health outcomes being disproportionately experienced by those already disadvantaged. Applying the Monash Heat Vulnerability Index, several sites were identified in Melbourne, which are low in vegetation and tree cover (i.e. hotter) with higher levels of social and economic disadvantage. Following on from the pilot of this Initiative in 2018/19, which involved the resourcing of cross-sector collaborations led by community health organisations in Brimbank, Dandenong and inner Melbourne, the Initiative will be extended to further sites in Greater Melbourne.	Healthy & Resilient Communities Secondary Impact Areas: Environment & Sustainability
Resilient & Inclusive Melbourne	Recognising that many of the elements of a resilient and inclusive city are interrelated, the Foundation has sought advice from the Melbourne Sustainable Society Institute about gaps in knowledge (both research and translation into practice). Some of the areas identified are already part of the Foundation's granting priorities: sustainable affordable built environments including housing; urban greening for a cooler city, and healthy and resilient urban food systems. The potential for a project relating to digitalisation as a driver of urban sustainability and health, and the support for a Resilient & Inclusive City Knowledge Network (transdisciplinary and with a focus on research into practice) will also be explored.	Environment & Sustainability Healthy & Resilient Communities Homelessness & Affordable Housing
Education & Employment	Build our collaborations and knowledge in the area of future jobs and economic inclusion with a focus on young people, older women and transitioning industries. Use this work to inform an initiative for this area in 2020/21.	Education & Employment

Developmental Initiatives

These Initiatives that will enhance our organisational and donor development.

Initiative		Impact Areas
New Philanthropy Program	Establish a new philanthropic vehicle with transferability and flow-through capacity to enhance collaborative opportunities and catalyse a new philanthropy experience for our donors.	Inspiring Philanthropy
Impact Evaluation	Enhance the Foundation's Impact Evaluation Framework to include multi-impact projects using all the tools in the philanthropy tool box. Establish a new Impact Reporting Group to including representatives from our Community Insights, Communications and Grants teams.	Inspiring Philanthropy and other Impact Areas
Collaborative Philanthropy	Encourage opportunities for collective giving including the Foundation's Hive giving circles, hosting the Melbourne Women's Fund, Impact 100 and SPA Fund, and developing a Melbourne CBD fundraising initiative relating to homelessness.	Inspiring Philanthropy and other Impact Areas
Community Needs Research	Undertake Vital Signs 2020 to collate evidence about the big issues facing Melbourne, the things to improve and the things to celebrate.	Inspiring Philanthropy and other Impact Areas
Responsible Investment	Complete our review of the Responsible Investment policy and achieve the full Impact Investment asset allocation.	Inspiring Philanthropy and other Impact Areas