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
- INFLUENCING POLICY
  Making the case with grant partners, collaborators and directly to decision makers
- GRANTS
  Supporting charitable organisations and innovative projects: Innovation, Exploration, Thrive (Capacity Building) and Proactive Grants
- COLLABORATION & NETWORKS
  Collaborating with grant partners, subject matter experts and other funders
- INITIATIVES
  Designing what works with partners
- IMPACT INVESTMENT
  Maximising impact through mission aligned investments – social impact and financial return (in addition to grants)
- RESEARCH
  Finding and organising relevant facts and figures to inform our Impact Areas
- STRATEGIC COMMUNICATIONS & IMPACT REPORTING
  Engaging the community in our work, sharing our knowledge
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 world’s 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 (lmcf.org.au) led 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)


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.

May 2019
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**

1. **Education & Employment**
   - Reduced current and emerging skills and capabilities gaps to improve life and work readiness.
   - Increased economic inclusion, resilience and workforce adaptability.

2. **Environment & Sustainability**
   - Increased energy efficiency and climate resilience of vulnerable households.
   - Increased public understanding of the climate challenge.
   - Secure, healthy and sustainable food systems.
   - Protected and rehabilitated aquatic eco-systems.

3. **Healthy & Resilient Communities**
   - Increased cross-sector collaborations strengthening community resilience to extreme weather and disasters.
   - Increased capacity of health organisations to respond to the health impacts of climate change.
   - Reduced discrimination and inequality that undermine resilience.

4. **Homelessness & Affordable Housing**
   - Increased supply of quality affordable housing.
   - Interventions that prevent entry into or entrenchment in homelessness.

5. **Inspiring Philanthropy**
   - Increased community philanthropy including donor advised grants.
   - Strategic support of the philanthropic sector.
   - Strengthened charitable sector.
   - Increased support of impact investment and social enterprises intermediaries.
   - Community Needs Research.

**United Nations Sustainable Development Goals**

1. No Poverty
2. Zero Hunger
3. Good Health and Well-being
4. Quality Education
5. Gender Equality
6. Peace & Justice
7. Life on Land
8. Clean Water & Sanitation
9. Affordable and Clean Energy
10. Reduced Inequality
11. Sustainable Cities
12. Climate Action
13. Life Below Water
14. Life on Land
15. Peace & Justice
16. Partnerships

May 2019
Impact Initiatives 2019/20
Each year, the Foundation leads a small number of key Initiatives. In the coming year, these are our priorities.

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Impact Initiatives 2019/20</th>
<th>Impact Areas</th>
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</thead>
<tbody>
<tr>
<td>Affordable Housing Challenge</td>
<td>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.</td>
<td>Homelessness &amp; Affordable Housing</td>
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<td>Energy Efficiency &amp; Climate Resilience in Vulnerable Households</td>
<td>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.</td>
<td>Environment &amp; Sustainability</td>
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<td>Hot Spots</td>
<td>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.</td>
<td>Healthy &amp; Resilient Communities</td>
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<td>Resilient &amp; Inclusive Melbourne</td>
<td>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 &amp; Inclusive City Knowledge Network (transdisciplinary and with a focus on research into practice) will also be explored.</td>
<td>Environment &amp; Sustainability</td>
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<td>Education &amp; Employment</td>
<td>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.</td>
<td>Education &amp; Employment</td>
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Developmental Initiatives
These Initiatives that will enhance our organisational and donor development.

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<th>Impact Areas</th>
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<tr>
<td>New Philanthropy Program</td>
<td>Establish a new philanthropic vehicle with transferability and flow-through capacity to enhance collaborative opportunities and catalyse a new philanthropy experience for our donors.</td>
<td>Inspiring Philanthropy</td>
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<td>Impact Evaluation</td>
<td>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.</td>
<td>Inspiring Philanthropy and other Impact Areas</td>
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<tr>
<td>Collaborative Philanthropy</td>
<td>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.</td>
<td>Inspiring Philanthropy and other Impact Areas</td>
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<td>Community Needs Research</td>
<td>Undertake Vital Signs 2020 to collate evidence about the big issues facing Melbourne, the things to improve and the things to celebrate.</td>
<td>Inspiring Philanthropy and other Impact Areas</td>
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<td>Responsible Investment</td>
<td>Complete our review of the Responsible Investment policy and achieve the full Impact Investment asset allocation.</td>
<td>Inspiring Philanthropy and other Impact Areas</td>
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