We have embarked on this journey to create more discernible social change through our Strategic Partners.

THE TRUST COMPANY
The Trust Company launched its new Engaged Philanthropy model for distributions from broad discretionary charitable trusts during its 2011 funding round. We moved away from small, one-off annual grants to many organisations, towards a limited number of multi-year, Strategic Partnerships in a focused set of program areas.

Each year we distribute income from our portfolio of broad discretionary charitable trusts in Australia (see Appendix A).

The key design principles behind our new distribution model are to:

- Focus on a defined set of program areas
- Work with and support a small group of Strategic Partners to deliver a more discernible social impact
- Support Strategic Partnerships with larger grants over several years
- Fund capacity building and strategic, outcomes-focused projects
- Leverage our time, information, networks, skills, goods, services, influence and voice to support strategic initiatives.

We selected the following program areas which reflected the legacy of the generous philanthropists for whom we act as trustee.

Socially Inclusive Education supporting organisations that invest in leadership and learning of our marginalised communities (Australia and Papua New Guinea)

Living with Disability supporting organisations that help Australians living with disabilities to live to their fullest potential

Positive Ageing supporting organisations that help the health and wellbeing of senior Australians

Research and Development Fund supporting a range of initiatives investing in broader social sector capacity, innovation and entrepreneurship.

Seventeen inaugural Strategic Partners were selected in 2011 and supported with multi-year grant commitments totalling $5 million (see Appendix B).

In partnership with the Melbourne Business School (MBS), The Trust Company initiated The Trust Company Fellowship which supports and guides the collaborative process and designs and delivers a social impact assessment of the granting portfolio. An important aspect of the Fellowship is the sharing of information and best practice models. To support this process, MBS hosted two symposiums for Strategic Partners in March and October this year.


Twelve months later, the architecture of our Engaged Philanthropy model is now in place, including 12 additional Strategic Partners. This report covers the key findings so far, an outline of the philosophy and principles being adopted, learnings and outcomes so far, an overview of our social impact framework and our plans for 2013.
Welcome to The Trust Company’s inaugural Social Impact Report, *Stepping Stones*, an annual communiqué on its granting model for its broad discretionary trusts called Engaged Philanthropy.

As trustee to 850 charitable trusts distributing over AU$40 million income per year from a combined corpus of around AU$1 billion, we are mindful of our responsibilities to both our clients – the generous benefactors of these charitable trusts (see Appendix A) – and the community in being proactive with our granting philosophy to enhance the social impact of our decisions as trustee when afforded discretion.

The merger with Guardian Trust in New Zealand in 2011 brought substantial scale to our philanthropy responsibilities and heightened our resolve to articulate a compelling regional vision across our Group.

This Engaged Philanthropy model is our response to strong global and local trends in philanthropy. Greater cross-sector collaboration and a mindset of collective action in dealing with societies’ most intractable social problems have compelled us to do things differently. There are significant benefits if we reposition more as a broker and catalyst to encourage partnerships between all sectors of society – not-for-profits (NFP), government, philanthropists and corporations – brought together around a common desire to address a specific issue.

*Stepping Stones* explores our progress and learnings in the first full year of implementation in Australia. We have embarked on this journey to create more discernible social change through our Strategic Partners, and plan to introduce Engaged Philanthropy to our New Zealand discretionary charitable trust portfolio in due course.

Liz Gillies, as The Trust Company Fellow at the Melbourne Business School (Asia-Pacific Social Impact Leadership Centre) and independent advisor on our Engaged Philanthropy model, has been a wonderful support to our team and Strategic Partners and strengthened the veracity of this new model.

We hope you enjoy this report, and we welcome any feedback and ideas in terms of our philosophy and guiding principles to achieve more optimal social outcomes from our broad discretionary trusts.

Thank you to all our Strategic Partners and the wider team for their enthusiasm and support in our first year of Engaged Philanthropy.

Simon Lewis,
Head of Philanthropy & Community
As The Trust Company Fellow at the MBS Asia Pacific Social Impact Leadership Centre, I am pleased to be making my contribution to this report after an important year of helping to bring their Engaged Philanthropy model to life. Since discussions commenced in early 2011, it has been a pleasure being involved with this refreshing granting approach with one of the region’s largest independent trustee companies.

Our mission at the Asia Pacific Social Impact Leadership Centre at MBS is to create social impact by developing collaborative efforts between NFP, philanthropic, business and government sectors. The Trust Company wanted to initiate an independent fellowship at the MBS to support this initiative within their Engaged Philanthropy model.

The Fellowship is focused on four things, these are:

- Using a theory of change methodology to explore the development of a framework for grant making for social impact
- Exploring the role of evaluation and measurement within the context of this framework
- Deepening understanding of philanthropic practice models and frameworks to gather insights into what works and lessons learned
- Exploring philanthropic leadership and enhancing the understanding of what role the philanthropist can play in supporting social impact initiatives with a specific focus on collaborations.

In terms of how these objectives have played out during 2011 and 2012, I can report that we have:

- Identified and supported the development of best practice philanthropic models for social impact
- Supported The Trust Company to continue to develop the Engaged Philanthropy model through discussions and presentations with their philanthropy team and The Trust Company Board
- Worked with The Trust Company Strategic Partners to clarify the theory of change and develop an evaluation framework to track progress
- Skilled up The Trust Company team and Strategic Partners to move towards collective impact initiatives
- Conducted bi-annual symposiums, conferences and other development platforms to share insights, build networks and foster and promote collaborations for collective impact.

We have achieved a significant amount in a short time, and the opportunity to co-present on this important topic at various functions and conferences evidences the strong partnership emerging between The Trust Company and MBS. MBS plan to develop a strategic impact framework for this Engaged Philanthropy model drawing on international best practice, and we look forward to reporting on this in next year’s report.

Liz Gillies, The Trust Company Fellow Asia Pacific Centre for Social Impact Leadership Melbourne Business School
KEY FINDINGS

Process

As illustrated to the left, there were significant efficiencies for us switching to a more focused distribution model around our program areas in 2012. Importantly, we were able to discuss the applicants' ideas for funding prior to an expression of interest being submitted which resulted in a higher success rate from 12% to 20%.

The focused approach permitted greater dialogue between the program area leads and the applicants both prior and post the selection process. This informed our team about the important issues facing the organisations in our selected program areas and ensured a higher quality submission.

Funding round statistics

• In the 2011 funding round, we signalled our intention to migrate away from the one-off annual project-based approach towards the Engaged Philanthropy model

• We received 474 applications through the online platform before 30 June 2011 in the standard online format across all program areas

• 17 multi-year Strategic Partnerships were selected, and 40 one-off grants were made amounting to a total commitment of over $5 million

• A total of 57 successful applicants represents a success rate of 12% (see Appendix B).

• In the 2012 funding round, we received a total of around 300 verbal enquiries to our program area leads for Socially Inclusive Education, Positive Ageing, Living with Disability and Research and Development Fund only

• A six page, open format ‘expression of interest’ was required to establish how well the organisations articulated their overall vision and strategy, and how the request for funding sat within our strategic framework

• 135 or around 40% of these initial enquiries moved forward to a formal Expression of Interest lodged with The Trust Company prior to 30 June

• 12 new multi-year Strategic Partnerships were selected, and 15 one-off grants were made amounting to a total commitment of over $3.5 million

• A total of 27 successful applicants represents a success rate of 20% (see Appendix B).
The model

Spending time upfront developing the philanthropic framework for the Engaged Philanthropy approach in partnership with The Trust Company team, Liz Gillies, the MBS and our Strategic Partners has paid dividends as the shared insights and collective approach has strengthened the model and clarified our sense of purpose.

There is a lot of support and enthusiasm for the idea of ‘high engagement’ philanthropy, but we acknowledge the many variants of how to achieve this. We have been careful to articulate our model, while being open to suggestions on how to improve it. Holding regular discussions with other large trusts and foundations about their respective granting philosophies has been particularly beneficial.

The clarity of our Engaged Philanthropy model greatly assisted in our 2012 grant making round which was more strategic, focused and successful.

A focus on strategic impact takes time and requires persistence and strong frameworks for funding and resource support. We are at the beginning – there is much work to do.

Partnerships

The partnership model is evolving and strengthening. It takes time to develop strong relationships and we will continue to work hard to incorporate the three fundamental principles: equity, transparency and mutual benefit into our partnerships.

Further, we have learnt that not everybody wants to partner. This is perfectly acceptable and we will focus on becoming better at clarifying these relationships and ensuring that our grant making is respectful of such choices. We will also support our Strategic Partners that feel more at the fringe of our emerging theory of change for the program areas.

Partnership is an art and a science and requires a sophisticated set of skills to be successful. We will continue to build on this skill set across all aspects of our work.

Evaluation

Although challenging, evaluation is fundamental to our journey and we will work with our Strategic Partners as we all deepen our understanding of the most appropriate way to continue forward.

We will continue to deepen the partnership group’s knowledge of a theory of change approach and stretch ourselves in terms of using this model to enhance the strategic impact of our grant making.

Our partners tell us that they need more support in this area of their work and we will focus on providing this in 2013. The introduction of a theory of change approach to our acquittal process has been a good first step. Some organisations are further into this approach than others, as illustrated in this report.
In line with best practice global trends in philanthropy, the Engaged Philanthropy model focuses on supporting Strategic Partners to deliver discernible social impact by adopting a theory of change approach to their programs, and supporting these partners over time to work with others for collective impact around identified areas of focus.

It moves away from the closed-door grant making of the past. As trustee, we now invite our Strategic Partners around the table to discuss a common agenda in terms of their work and the social change they are trying to effect, and to share the responsibility of determining the direction of the program and discussions about future grants. This gives incentive to the Strategic Partners to find some mutual interest, and to adopt a more holistic theory of change framework and perspective in their organisation.

As per Figure 1, our model is designed to bring more experts and stakeholders around the table in the grant making process, and to encourage a more collaborative approach between all sectors. The Engaged Philanthropy model takes us more in the direction of collective impact, but we acknowledge this is a long-term and ambitious goal.

In our new role as broker and catalyst rather than ‘traditional grant maker’, we acknowledge the messy and slower work ahead of facilitating partnerships. However, we are adamant that the potential upside more than compensates our effort.

In terms of best practice philanthropy, and acknowledging the wide variety of terminology around more ‘engaged’ philanthropy, it is worth mentioning the several models and reports that have influenced our thinking.

**Figure 1: Moving towards collective impact**
Assembling around the table cross sector experts to collaborate and co-invest in a theory of change

<table>
<thead>
<tr>
<th>TRU</th>
<th>The Trust Company philanthropy representative</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBS</td>
<td>Melbourne Business School representative</td>
</tr>
<tr>
<td>SPs</td>
<td>Strategic Partners per program area</td>
</tr>
<tr>
<td>GOVT</td>
<td>Government representative</td>
</tr>
<tr>
<td>CORP</td>
<td>Corporate representative</td>
</tr>
</tbody>
</table>

‘YESTERDAY’
Grant making by a team of experts at The Trust Company

‘TODAY’
Strategic Partners, selected and arranged by program area, come together to discuss a common agenda with support from MBS and TRU

‘TOMORROW’
Theory of change defined, new Strategic Partners added and cross sector collaborators from Government and Corporate welcomed to invest in the social change agenda
a. The Gift Continuum

There will always be a broad spectrum of philanthropic practices in Australia along the so-called ‘gift continuum’. Some philanthropists have an interest in meeting immediate need, while others are focused on supporting more strategic initiatives which seek to solve intractable social problems. The Trust Company has determined the greatest opportunity to enhance impact lies towards the more strategic end and away from its traditional approach.

Philanthropy in partnership with the grant seeker(s) identify an issue on which they wish to focus. The partnership develops insight and understanding of the issues, the sectors involved, the evidence base which does or should exist, the gap or opportunity that needs to be articulated, defined and scoped. And collectively, aspires to contribute to systemic change and better outcomes across the community.

b. Catalytic Philanthropy

Mark Kramer’s seminal article in the Social Impact Review Catalytic Philanthropy1 covers much of the debate about the limitations of traditional philanthropy. It taps into global trends that point to the significant opportunity presented by a more strategic approach. In quoting a piece of research sponsored by the Bill and Melinda Gates Foundation which explores why some donors are were more effective than others, he comments:

“However generous the donors or hardworking the non-profits, there is no assurance - nor even likelihood - that supporting underfunded, non-collaborative and unaccountable approaches of the countless small non-profits struggling to tackle an issue will actually lead to workable solutions for large scale problems.”2

Mark Kramer went onto develop the argument that because of these limitations philanthropists should consider moving from more traditional and conventional approaches to what he termed catalytic philanthropy.

Kramer identified four practices for catalytic philanthropy and suggested that in order for philanthropists to maximise the impact of their grant making they should take responsibility for achieving results, mobilising a campaign for change, using all available tools and creating actionable knowledge.

Philanthropy can choose to play an important role in cultivating this conversation and in building this neutral space. It can challenge the existing mindsets, both within and between the sectors, provoke the debate and question the underlying assumptions.

It can leverage its networks, assist in identifying the evidence gaps, gather the knowledge, access and nurture the innovation, mediate the solution, support and influence strategy.

“Social problems arise from the interplay of government and commercial activities, not only from the behavior of social sector organisations. As a result complex problems can be solved only by cross-sector collaborations that engage those outside the nonprofit sector.”3


---

2 Ibid.
3 Ibid.
c. What do we mean by a theory of change?

Grant making at the more strategic end of the spectrum has a much greater emphasis on strategy and leadership and on developing and clarifying the theory of change that underpins the program being supported.

A theory of change requires an understanding of the change being sought, clarifying the change process required and assessing the impact of the work being undertaken. Figure 3 outlines the steps in building a theory of change evaluation framework and the questions that need to be addressed within each step.

d. Other valuable references

- The Harvard Business Review Article on Theory of Change http://hbr.org/2000/05/cracking-the-code-of-change/ar/1

<table>
<thead>
<tr>
<th>ASSUMPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What is the problem you want to address?</td>
</tr>
<tr>
<td>• What are the underlying causes of the issue or problem?</td>
</tr>
<tr>
<td>• At what depth or level do you want to work?</td>
</tr>
<tr>
<td>• What impact do you want to achieve?</td>
</tr>
<tr>
<td>• What would the solution to the issue look like?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TARGET GROUP</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Who would be impacted?</td>
</tr>
<tr>
<td>• How could you reach/influence the identified groups?</td>
</tr>
<tr>
<td>• What vehicles would you use?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STRATEGIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What tools or process would you need to influence the identified groups?</td>
</tr>
<tr>
<td>• What resources (financial, time, skills, knowledge) would you need to employ these tools and processes to effectively influence the target groups?</td>
</tr>
<tr>
<td>• What resources do you have?</td>
</tr>
<tr>
<td>• What skills, knowledge and other resources do you need to develop?</td>
</tr>
<tr>
<td>• Who else is working in the field?</td>
</tr>
<tr>
<td>• Are there opportunities for cooperation and partnerships?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• How will you know when you have succeeded?</td>
</tr>
<tr>
<td>• What counts as progress/success after one year, two years, three years?</td>
</tr>
<tr>
<td>• What indicators will you use to measure your achievements and impact?</td>
</tr>
</tbody>
</table>

**Figure 3: Theory of Change**

*Grantcraft: Mapping Change: Using a Theory of Change to Guide Planning and Evaluation*
The Engaged Philanthropy approach is built on the premise that constructive collaboration, dialogue and exchange has a multiplier effect. It can help disseminate good ideas and practices and drive innovation. In doing so, such collaborations can act as mechanisms for systemic change.

THE TRUST COMPANY
Good progress in creating the partnership framework

From the outset, we were mindful of creating greater equity in the funder and recipient relationship that is traditionally hierarchical. Therefore it was important to select inaugural partners with the capacity in their executive and board to implement broader social change through this partnership model. Quality leadership with a well-defined strategic plan and a quantified track record is initially the best proxy for social impact.

Aligned The Trust Company team behind each program area

Members of The Trust Company Philanthropy & Community team were aligned behind each program area to ensure they were building their own knowledge and supporting the strategic partner in terms of our broader relationship with their organisation. The team are highly engaged in their new roles, and their endorsement heightens the chances of success and social impact down the track.

Refined program area focus

We incorporated the refined focus into the 2012 funding round application process. In April 2012, we advertised for applications that would fit with the emerging focus in each program area as defined below. We took over 300 phone calls and enquiries, and ended up with 135 quality applications as against nearly 500 applications we received in the traditional granting model in prior years:

- Socially Inclusive Education will focus on indigenous pathways
- Positive Ageing will focus on stroke and dementia/palliation
- Living with Disability will focus on online information portals for disability services.

Support organisations to adopt a theory of change model

In particular, The National Stroke Foundation are leading an attempt to adopt this model at the level of the Australian Stroke Coalition, and we have provided additional funding to them for this initiative.

We funded an additional 12 Strategic Partners in the 2012 funding round with multi-year commitments of $3.5 million which included additional investments to Strategic Partners. This was in addition to the $1.7 million per annum invested in the inaugural 2011 Strategic Partners. In addition The Trust Company made a round of 15 one-off distributions worth nearly $1 million to organisations within each program area. Maintaining the capacity to support a smaller number of one-off distributions will ensure that The Trust Company is able to continue to foster and support innovative organisations.

$1.7m per annum invested in the inaugural 2011 Strategic Partners

$3.5m multi-year commitments made in 2012
SOCIALLY INCLUSIVE EDUCATION

Supporting organisations that invest in leadership and learning of our marginalised communities (Australia and PNG)
In 2011 The Trust Company identified Socially Inclusive Education as one of the program areas for discretionary funding, largely inspired by the Fred P. Archer Charitable Trust. The geographic scope of this Trust includes Australia and PNG.

Socially Inclusive Education seeks to address disadvantage which exists in the community and limits both access to education and the opportunity for marginalised communities to succeed in education, training and employment pathways.

Through collaborative discussions with existing partners, The Trust Company further tightened the Socially Inclusive Education focus to indigenous pathways within Australia and on teacher training and leadership in PNG.

To complement the work of the 2011 partners, a number of additional Strategic Partners were supported in the 2012 funding round. Berry Street, Charles Darwin University, Australian Indigenous Mentoring Experience (AIME), the Clontarf Foundation and Kimberley Group Training will enhance this stream to actively collaborate, share best practice and expand on their work into education support.

In addition a number of one off grants were given to support the pipeline of work in the education stream. Mission Australia, Whitelion and the St Andrew’s Cathedral School are all doing excellent, innovative work in this space. The 2013 grants process will be an opportunity to consider which of these organisations might like to join the Strategic Partners group going forward.

Finally, a further grant of $60,000 was awarded to the WA Community Development Foundation (CDF) and Social Ventures Australia (SVA), both 2011 Strategic Partners, to collaborate and assist CDF to develop a structured business strategy about their growth plans.

As head of one of the leading initiatives that fosters best practice in the education sector, Justine Munro, Education Director at SVA, shares her thoughts on their approach and linking in with the Engaged Philanthropy model.

“Social Ventures Australia’s Education team focuses on helping disadvantaged Australian children to have a better chance to achieve at school.

“Fortunately Australia has many committed, passionate engaged philanthropists who respond to the needs of the community. The Trust Company is a leading example of an organisation which has taken the opportunity to make an even greater impact through its engaged philanthropy model.

“The Trust Company has enabled us to be more focused on our education projects and go deeper into the issues by supporting our work. The Trust Company’s approach is especially important as it helps the sector to avoid replicating others’ work and to collaborate wherever possible. Through The Trust Company we have met many other projects and inspiring leaders and through this we already have one new partnership underway.”

Figure 4: Complex group with PNG and AU dimensions
Supporting organisations that help the health and wellbeing of senior Australians
In 2011 The Trust Company identified Positive Ageing as one of the key themes for discretionary funding reflecting the numerous discretionary trusts focused on the aged care and as a natural extension of the services we provide to our clients.

Positive Ageing seeks the continued inclusion of people in society as they age, seeing older people as positive contributors and assets in the community. It is a positive approach to the challenges and opportunities surrounding ageing such as: a focus on prevention and primary care to keep people healthy, active and mobile for longer, programs which support people to continue to reside in their own homes; and initiatives to promote open discussions around advanced care planning.

Through collaborative discussions with existing partners, Mercy Health Foundation, The National Stroke Foundation and The Florey Institute of Neuroscience, The Trust Company further tightened the Positive Ageing stream to focus on Stroke, Dementia and Palliative Care. This focus will be complemented by the addition of one Strategic Partner in 2012, LifeCircle Australia.

A number of one-off grants were provided to organisations doing commendable work in the ageing sector. These are QLD Hibernian Friendly Society, The Royal Australian College of General Practitioners, Churches of Christ in QLD and Port Kembla Community Project. There may be an opportunity for these organisations to join the Strategic Partners group in 2013.

Additionally a further grant of $75,000 pa was awarded to the National Stroke Foundation to apply a theory of change strategy to The Australian Stroke Coalition with the aim to see improved stroke care in Australia.

A further $110,000 has been provided to support Professor Fran McInerney, Chair of Aged Care at Mercy Health/Australian Catholic University, build on earlier work to enhance care staff and family member care planning for people with advanced dementia.

Our commitment to the Chair of Aged Care position has created leadership role for the sector and has provided opportunities to share knowledge with the wider aged care community throughout Australia. This was recently demonstrated in Melbourne at a jointly hosted lunch on 20 September. Mercy Health and The Trust Company invited aged care providers, academics, industry leaders and government departments to share with Prof McInerney the improvements and advancements of care for the aged and how we train the workforce to deliver the best care.
Supporting organisations that help Australians living with disabilities to live to their fullest potential
As a result of consultation between the Strategic Partners at the March MBS Symposium, the Living with Disability partnership group decided that they would focus on applying a collective impact approach to sharing information online.

The Strategic Partners identified that a common concern for people with disabilities and their families is the difficulty in finding out about appropriate services and support in accessing them. As the National Disability Insurance Scheme (NDIS) is rolled out and as the states move to individual support packages the onus will be on people with disabilities and their families to identify the best services to meet their needs.

The Trust Company in partnership with those in the Living with Disability stream are keen to form partnerships over coming years that work towards the goal of sharing information about services and equipment through online platforms to improve the quality of life for people with a disability and their families.

The 2011 Strategic Partners, Lifestart, Youngcare and Paraquad, will be joined by Scope in 2012. With multi-year commitments made from the Elliot Trust in 2012 supporting organisations that promote learning aides and guide dogs for low vision communities in Australia. We have also welcomed the Royal Institute for Deaf and Blind Children and Guide Dogs Victoria to continue to work more collaboratively with us on the development of more sophisticated online platforms to share information and resources to the wider disabled community.

In addition to the grant of $100,000 pa for three years that the Lifestart Cooperative received in 2011, a further grant of $130,000 pa for three years has been awarded by The Trust Company to support this important collective impact initiative.

“I want to reiterate the strong interest that has been shown in the project by Ageing, Disability and Home Care (ADHC) in the NSW Department of Family and Community Services…..I see this as an important affirmation of the value of the project and its potential to reach out across the community. It is also a great outcome around the success of community engagement in terms of accessing where our current developmental work sits within the wider change process which rests so strongly on successful collaboration with the community.”

Suzanne Becker, CEO Lifestart.
RESEARCH AND DEVELOPMENT FUND

Supporting a range of initiatives investing in broader social sector capacity, innovation and entrepreneurship
The NFP sector is expanding under the influence of many important trends such as social enterprise, impact investing, innovative funding models and online technologies. As a trustee with over 100 years experience servicing philanthropists and supporting the NFP sector, we want to be more involved with the social sector of the future. Within our focus in this area we made strategic investments in Public Interest Law Clearing House (PILCH) Victoria, School for Social Entrepreneurs (SSE) and the Fellowship at Melbourne Business School.

In 2012, we complemented the work around social enterprise with investments in Many Rivers for the expansion of their microfinance initiative in WA, and with Lifeline which is conducting a strategic review of their national store franchise of 256 shops. We partnered with the PwC Retail Strategy Team and the PwC Foundation (who matched our investment) on this initiative to ensure that Lifeline can lift the overall profitability of its store network and deliver additional funds for its core operations. Other large organisations have done this successfully, and the potential impact of implementing the strategy developed by the PwC team will be in the millions of dollars.

We extended our investment in capacity building with an investment in the Indigenous Rights Unit at the Human Rights Law Centre (HRLC). Here, we acted as the anchor funder for a consortium pulled together by Indigenous advocate Ron Merkel QC and we are pleased to say our annual contribution to this initiative was matched four-fold and ensures this new unit has multi-faceted support from the beginning.

Our investment in the work of Dr. Chris Baker at Swinburne University on bequests and extending his pilot on Victorian probate data into a national study, will ensure we are informed to support NFPs who are looking to extend their organisation’s bequest strategies. Demographics and significant wealth tied up in the retiree sector suggests we are about to witness the biggest wealth transfer ever recorded within the next generation – and bequests remain significantly untapped, languishing as single digits in terms of gifts in wills.

We welcome the Australian Centre for Philanthropy and NonProfit Studies at Queensland University of Technology as a strategic partner with a three year investment in their NFP Board effectiveness tool. We intend to make this tool available for all our Strategic Partners in due course and promote the importance of effective governance within the sector more generally. Our one-off investment in the pilot-study of The Funding Network (Australia) to establish the business case for introducing a new format for matching donors with exciting new social change projects has highlighted the potential of new models in philanthropy, following the leads in the UK and the US. During the course of 2012 we were appointed trustee to the SVA Social Impact Fund http://www.socialventures.com.au/wp-content/uploads/2012/06/SVA-Social-Impact-Fund-IM1.pdf which is one-such social investment fund seeded by Department of Education, Employment and Workplace Relations’ $20 million initiative.
CASE STUDIES
The Fred P. Archer Charitable Trust, our largest wide discretionaty trust, was established in 1977 to support education for marginalised communities in Australia and PNG and broader projects alleviating poverty. Fred P. Archer spent 54 years of his life in PNG and this Trust is arguably the largest private foundation supporting education in PNG in the world.

Opportunities to undertake tertiary studies in PNG are rare for Papua New Guineans. Tuition fees are expensive, there are few qualified academics and institutions are limited. Investment in higher education institutions by the PNG government is small and there is significant need for skills and qualified professionals for all sectors throughout PNG.

Over its ten years of working in PNG, The Kokoda Track Foundation has identified the pressing need to find and foster the next generation of PNG leaders. They have been a Strategic Partner for the last two years.

The Trust Company awarded a grant of $130,000 per year for three years to support the Archer Leadership Scholars Program which aims to support six final year tertiary students from across PNG in a year-long leadership program.

The first year evaluation identified many short-term benefits including the development of interpersonal relationships and support, leadership skills and knowledge, exposure and new perspectives, networking, employment pathways, confidence, self-esteem and reduced financial stress.

The continuing development of the evaluation framework will focus on the development of longer term outcomes which will include the impact of the program on the individual scholar and their family and community.

In 2012, we agreed additional funding to support The Kokoda Track Foundation with the capital funding to build a training college for teachers and health workers in the Koko Village to supply the qualified teachers to the region and support the broader educational and health programs provided by the Foundation. With a gift of $200,000 from the Fred P. Archer Charitable Trust, the Foundation has managed to raise over $380,000 for the building of the school.

This Foundation is a strong illustration of the quality of leadership and vision that, in only a short period of time, has translated into a significant set of outcomes for the Kokoda community. The Prime Minister of PNG, Peter O’Neill, was a guest at the recent Ralph Honner Oration event in Sydney which is a strong testament to the partnership and collaboration skills of the Foundation Board and Executive.

We also invested $50,000 with the Royal Melbourne Institute of Technology (RMIT) research fellow Dr. Yaso Nadarajah from the Fred P. Archer Charitable Trust on important community development work with the remote Patea people in PNG (aka the Kukukuku tribe) in the Marobe Province. Fred attended the Working Men’s College Lower Technical School (now RMIT) in 1905.

To top off an excellent year of initiatives in PNG, The Trust Company took up a team of family and friends to walk The Kokoda Track in October 2012 in support of hike4hunger, an international campaign towards World Food Day on 16 October each year. We were able to visit the schools and clinics and witness important work of The Kokoda Track Foundation en route.

We hope to make The Kokoda Track an annual event and to become known as ‘the trustee that does the track!’

There is an urgent need for a new generation of leaders who will strive for adaptive change and profess towards a better future for their fellow Papua New Guineans.

GENEVIEVE NELSON, EXECUTIVE DIRECTOR
THE KOKODA TRACK FOUNDATION
The Trust Company grant of $100,000 per year for three years has supported the development of The National Aspiring Leaders Summit, a joint initiative of Outward Bound Australia and The Smith Family, which seeks to address the main causes of decline in the development of leadership skills for young people in disadvantaged communities.

Working in partnership with Outward Bound, young people are identified by The Smith Family network. Those selected to take part in the program identify a local issue that personally resonates for them, and come to the summit to gain and develop practical and leadership skills. When they return to their communities they use these skills to work towards local solutions to their identified issue.

Outward Bound has used an evaluation framework for this project since 2007. Working through the theory of change acquittal process identified a number of additional questions that will be incorporated into the 2013 evaluation framework.

In addition, a new partnership was forged between Outward Bound and the Australian Indigenous Education Foundation after meeting at the MBS Symposium in March 2012. In September 2012, with the additional support of a $44,000 grant from The Fred P. Archer Charitable Trust, Outward Bound ran a successful pilot with the Australian Indigenous Education Foundation (AIEF) which focused on confidence, team work and leadership skills. The grant also supported the continuing development of Outward Bound’s work with Indigenous young people.

As a direct consequence of the Engaged Philanthropy model, Outward Bound Australia has delivered the National Aspiring Leaders Summit in 2012 and dynamically influenced the potential of 30 young people from all over country. Each of these young people have returned home to their community with a plan in place for a social action project, projects with the potential to engage and impact thousands of other young people, their families, schools and greater community.

Ben Farinazzo, CEO of Outward Bound Australia, shares his experience of working within the Strategic Partnership framework of Engaged Philanthropy.

“This metaphoric ripple reflects the journey we have undergone in relationship to the Engaged Philanthropy model. As each step of the process, our eyes have been opened to the wider available opportunities, the potential for mutually beneficial partnering and the conceiving of greater strategic aspirations.

“Further, the partnership with the Australian Indigenous Education Foundation has enabled 18 young indigenous participants to take part in an Outward Bound course focused on contributing to the long term objectives of AIEF, in particular, increasing progression rates for indigenous students through years 10 – 12 and participation/admission rates at university.

“The Engaged Philanthropy model has encouraged partner collaboration and enabled us to see the benefits of increasing the work we do with other like-minded organisations.”

Outward Bound values the engaged philanthropy model as a key strategic approach to partnering with others to achieve our collective impact.

BEN FARINAZZO, CEO OUTWARD BOUND AUSTRALIA
Stroke is the leading cause of death in Australia and a significant contributor to disability amongst adults. The consequences of stroke can include paralysis, inability to speak, difficulty with memory and thinking and problems completing everyday tasks.

In 2011 The Trust Company supported the National Stroke Foundation to undertake the National Stroke Survivor and Carers Needs Survey with a grant of $100,000 a year for three years.

The National Stroke Audit results revealed:

- 50% of stroke patients feel inadequately prepared to go home
- 50% of carers are not trained in techniques to support their partner
- Less than a third receive information to prepare for the transition home
- 28% of hospitals do not routinely provide a post discharge contact
- 39% of survivors do not routinely provide a discharge contact
- 30% of those with speech problems do not have their needs met
- 18% of those with mobility problems do not have their needs met
- 38% do not receive adequate help in the home.

The National Stroke Foundation’s research indicates that the underlying causes of poor access to systems, services and programs to meet the needs of survivors are varied and complex. They related to:

- A lack of understanding of the needs of stroke survivors and carers at all levels
- A lack of research which articulates the stroke survivor and carer need
- Variability in individual need and support and the treatment to meet need.

Other factors include:

- Lack of resources
- Lack of leadership
- Health professionals and service providers having difficulty accessing the available evidence to guide service provision
- The appropriate skills required are not always available in a particular service.

In the first of their partnership with The Trust Company, The National Stroke Foundation has considered the outcomes of the survey tool to estimate the levels of unmet need from both survivor and carer perspectives. This insight will be used to support the development of strategies, programs and ultimately policy to address those needs that have the highest priority.

In addition the National Stroke Foundation has undertaken consultations with stroke patients to gather more information about their experiences.

Armed with this clear understanding of patient need and in applying a theory of change approach across all dimensions of the National Stroke Foundation’s work, priorities for the next two years will focus on:

- The development of partnerships with like minded organisations working to influence the work they do and to engage with the National Stroke Foundation agenda
- Advocacy with government aimed at increasing the focus on stroke as a national health crisis and increasing the funds allocated to stroke service delivery
- Grass roots engagement with patients across the country, supporting them to speak out about stroke, their experiences and the need for change
- Media strategies which educate the general public about stroke and its impact and also support and encourage the community to speak out about the need for change.

The Trust Company was delighted to offer further support to the National Stroke Foundation by awarding an additional grant of $75,000pa to ‘Bring Collective Impact to Life to Improve Stroke Care in Australia’. This grant will facilitate the adoption of a theory of change approach to the collective efforts of the Australian Stroke Coalition (ASC).

The ASC was established in 2008 with representatives from over 18 stroke related organisations and works to tackle agreed priorities to improve stroke care, reduce duplication and strengthen the voice for stroke care at a national and state level.
The Engaged Philanthropy model has changed the way we approach our organisational planning and decision making. It has enabled the National Stroke Foundation to develop a framework which better links our vision and mission to the work of our people, programs and departments. It helps us better understand that each piece of work needs to connect to an outcome that will lead to us reaching out intended mission. It has influenced how we work individually, as teams and with our partners. This has had far reaching consequences as it changes our organisational culture, making us think more carefully about why we choose to do what we do, and what outcome we anticipate from our actions.
At an acquittal level, it is important to consider the extent to which the inaugural Strategic Partnership group has documented their organisations’ assumptions, target group, strategies and outcomes in line with the theory of change model criteria.

The 2012 acquittal forms were reviewed against this new evaluation methodology and ranked in terms of their level of readiness. These acquittal reports were reviewed using the following criteria (Figure 8) and progress to date matched against these criteria (Figure 9).

For a number of the Strategic Partners this was the first time they have been asked to document the assumptions, target groups, strategies and outcomes that underpin their projects. Understandably this was a challenging exercise.

**Figure 8: Theory of change criteria**

**ASSUMPTIONS**

| Level 1: | Problem is identified |
| Level 2: | Problem is identified and underlying causes articulated |
| Level 3: | Problem is identified, underlying causes articulated and supported by data and contextual analysis |
| Level 4: | Based on the data and contextual analysis the impact that is being sought is clear |

**TARGET GROUP**

| Level 1: | Target group is identified |
| Level 2: | Analysis of how to reach and influence the target group has been undertaken |
| Level 3: | Based on one and two vehicles to be used has been thought through |
| Level 4: | Evidence base in regard to the intervention has been taken into account that is being sought is clear |

**STRATEGIES**

| Level 1: | Tools and processes (strategies) for intervention identified |
| Level 2: | Based on one, resources (financial, time, skills and knowledge) that are required have been identified |
| Level 3: | Analysis of what resources are available and what resources will need to be developed has been undertaken |
| Level 4: | Skills, knowledge and resources that are required for the program have been sourced |

**OUTCOMES**

| Level 1: | Clarity about what program aims to achieve |
| Level 2: | Identification of progress/success factors at year one, two and three |
| Level 3: | Evaluation methodology that takes account of outputs and outcomes |
| Level 4: | Evaluation is linked to strategic planning and guided program design and development |
In summary, all the Strategic Partners have made significant achievements over the 12 months and contributed significantly to their area of focus. In this sense the majority of the Strategic Partners had no issue in outlining the outputs that they had achieved over the last 12 months. However, few were able to provide data in regard to outcomes and then use this insight to guide strategies and actions over the next 12 months.

In addition, most of the Strategic Partners were focused on developing programs from their own organisational perspective and are not yet ready to move towards a more collective impact framing of the issues they are involved with.

In recognition of this, a number of the Strategic Partners have successfully sought additional funding from The Trust Company to broker and support more collaborative opportunities.

As a response to these acquittals, the MBS October Symposium particularly focused on the theory of change and collaboration evaluation methodologies. Working with Regina Hill from Effective Consulting, the Strategic Partners considered a presentation on The Power of Collaboration and Models of Collective Impact.

The session focused on discussing the different models or theories of change that are being used by the Strategic Partnership group to help improve the delivery of program outcomes. Consideration was given to what model/theory of change underpinned each initiative, what ‘change levers’ the programs were using and what outcomes each program was trying to achieve. A deeper understanding of these factors will allow for a more considered discussion on what needs to be measured in order to assess progress.

Regina presented a framework for discussion to deepen understanding of models/theories of change and to support a more informed conversation of appropriate evaluation methodologies and measures going forward.

For the second year of The Trust Company’s Engaged Philanthropy program each Strategic Partner, in conversation with Liz Gillies, MBS The Trust Company Fellow, will clarify where they sit on the spectrum and what sort of collaborative activity they are involved in.

Building on these insights each Strategic Partner will further elucidate their theory of change, refine the change levers that they are using, confirm the outcomes they are trying to achieve and refine the measures that they will focus on in the second year.
We are pleased with the response from the Strategic Partners considering a lot more is expected of them in this model. Setting the expectations up front has been important.

THE TRUST COMPANY
CONCLUSIONS

It has been a rich and rewarding start to the journey towards collective impact for us and our Strategic Partners. Challenging the status quo and reframing the model around our objectives has not come without its challenges. The strategic clarity offered by our program areas has really helped align the team resources behind the new model, and ensure we do our bit as Trustee to provide our Strategic Partners with backbone support, the space and opportunity to collaborate, and the additional support beyond the money that sits at the core of a Strategic Partnership.

We are pleased with the response from the Strategic Partners considering a lot more is expected of them in this model. Setting the expectations up front has been important.

The larger Socially Inclusive Education group has been more of a challenge in that there is significant complexity in their individual models to work through first, but at least there have been several collaborations already that we have been able to support.

2013 and beyond

• We will soon induct the 2012 Strategic Partners and prepare them for the first 2013 Symposium in March next year. We will also hold one on one meetings with each Strategic Partner on the 2012 acquittal process and setting the agenda for 2013

• Further development of the Engaged Philanthropy Framework with a particular focus on measuring the effectiveness of our grant making practices. We hope to report back on the strategic impact framework that the MBS will develop to monitor this progress in next year’s report

• The biannual symposiums will be held during March and October and will focus on the areas of interest identified by our Strategic Partners, including technical sessions and knowledge sharing around issues of common interest and benefit

• We will share insights and learnings in regard to Engaged Philanthropy, strategic impact and evaluation more broadly across the philanthropic and NFP sectors by hosting forums in each capital city during 2013 to promote a shared practice community for impact.
The following generous benefactors appointed The Trust Company as trustee of substantial gifts to the community that generate the income that we distribute in our annual general funding round.

The Trust Company
Australia Foundation

Established by deed in 1985 in the name of the ‘Centenary Foundation’ with an initial donation of $100,000 from the company to celebrate the company’s centenary year and an additional $100,000 per annum for the following ten years. The Trust Company is sole Trustee and distributions from the Trust are entirely at the Trustees discretion. Until recently, beneficiaries have been extremely varied and the Foundation benefits only organisations providing charitable purposes within Australia. Tax deductible public donations and bequests are made to the Foundation.

The Mabel & Franklyn Barrett Trust

The Trust was established by the Will of Harrie Sylvia Marett, also known under her stage name as Todds Barrett. Todds was born in 1907 and died in 2002. The trust was established in honour of her parents, Franklyn Barrett, regarded as one of the greatest cinematographers in Australian history and her mother Mabel. Todds was a shrewd businesswoman who had established heavy industries in the Sydney suburb of Randwick and had built a healthy share and investment portfolio. She was a religious person and was also a great philanthropist. In her time she donated great sums to animal welfare, hospitals and to universities and was awarded an Order of Australia medal for her work in the community.

THE FRED P. ARCHER CHARITABLE TRUST

Born in Melbourne, Fred Palmer Archer (1890 – 1977) was a WWI veteran and Papua New Guinean plantation owner. A passionate believer in education, he saw this as the key for New Guineans to develop themselves and their country. He made generous donations towards education in PNG and just before his death he established the Fred P. Archer Charitable Trust to continue this work both in PNG and Australia. It remains our largest wide discretionary trust.

E.T.A Basan Charitable Trust
Established by the Will of Ernest Thomas Anderson Basan who died 1958. Mr Basan lived for much of his earlier life in WA where he operated realty and personal financier operations.

Miss M K A Bell Memorial Fund
Established by the Will of Miss Mary Kathleen Alexandra Bell who died in 1978. The Bell family were long term residents of the Geelong and western district area of the State. The Trust can only support charitable organisations based in Victoria.

Herman Charitable Trust
Established by the Will of Michael Frank Herman who died in 2003 after a short struggle with cancer. He is remembered for his commitment to the local community, to nature and as an innovative fundraiser for medical research. His Coldstream property was the venue for numerous fundraising activities over a long period.

Michael Herman raised close to $300,000 with much of that going to Medical Research including AIDS research. Also benefitting from his concerts were a number of local community organisations in the Lilydale region.

Dr & Mrs JJ Luddy Charitable Trust
Established by the Will of Dr John Joseph Luddy and Ethel Margaret Luddy who survived her husband and died in 1962. They lived in Brisbane. Dr Luddy was made captain of the Army Military Corps in 1912. The purpose of the trust is to benefit organisations providing care, comfort and maintenance to elderly people in Queensland.

The Trust Company Australia Foundation – Josephine & Walter Middleditch Memorial Trust
Created by the will of Albert Walton Middleditch who died in 1991. Following the death of the last life tenant in 2011 the income from the Trust is to be paid in perpetuity to The Trust Company Australia Foundation to be distributed to charitable organisations within Australia at the Trustees discretion.

The Helen Elizabeth Pagan Trust
Established by the Will of Ms Helen Elizabeth Pagan who died in 1997. The Trust is discretionary and is established broadly for disease research, education of children and to benefit organisations assisting people in need.

Cecil & Neita Quail Charitable Trust
Established by the Will of Cecil Gordon Quail of Hawthorn Victoria who died in 2002. Cecil was predeceased by his wife, Neita. Mr Quail is mentioned in Australian War Memorial Despatches 1946 for his service in the RAAF. The Trust is wholly discretionary.

Irene Emma Reid Trust
Established by the Will of Ms Irene Emma Reid who died in 1973. The Trust is discretionary but is limited to charitable organisations based in Victoria involved in the care of promotion of welfare for the aged or infirm.

Mary Isobel Field Smith Trust
Mary Isobel Field Smith passed away in Queensland in 2001. This discretionary trust however was not established until 2011 after the death of the life interest.

The income from the trust is to be distributed to charitable organisations within Australia at the Trustees discretion.

Eric Norman Sweet Trust
Established by the Will of Mr Eric Norman Sweet who died in 1959. The Trust is completely discretionary.

The Nancy Ewart & Grizelda Tennent Trust
Established by the Will of friends Ms Annie Isabel Ewart and Edith Grizelda Tennent. Annie died in 1996 and Edith died in 2001. Emphasis on helping organisations ‘such as the Smith Family which help people in necessitous circumstances’.

Anna White Trust
Anna Maria White died in 1943 and by her Will established five separate trusts. One of these, the Brocklesby Rest Home Trust, failed in 1998 and the capital was distributed between the remaining Trusts as the Will prescribed. The Anna White Trust is the largest of the remaining Trusts and is discretionary. It provides support, care and rehabilitation of individuals resident in Victoria who are suffering from any physical or mental illness or from any physical or intellectual disability.

George Pitt Wood Trust
Established by the Will of Mr George Pitt Wood who died in 1941. The purpose of the Trust is to benefit organisation based in NSW concerned with the relief of pain, suffering, physical disability, infirmity and financial distress.

The Woodend Foundation
The Woodend Foundation, a charitable trust, was established by deed in 1988 by Mrs Isabel Millner. Until that time distributions were made at her discretion solely and were varied. The Trust is completely discretionary.
2011 Strategic Partners
Socially Inclusive Education
• Social Ventures Australia
  Education Collaborative
• Australian Indigenous Education
  Foundation
• The Kokoda Track Foundation
• WA Community Development
  Foundation
• National Gallery of Victoria
• Interplast
• Foundation for Young
  Australians
• The Smith Family & Outward
  Bound
Positive Ageing
• Mercy Health & Australian
  Catholic University
• National Stroke Foundation
• Florey Neuroscience Institute
Living With Disability
• Youngcare & Griffith University
• Lifestart
• Paraquad NSW
Research and Development Fund
• Melbourne Business School
• School for Social Entrepreneurs
• Public Law Interest Clearing
  House.

2012 Strategic Partners
Socially Inclusive Education
• Australian Indigenous Mentoring
  Experience
• Clontarf Foundation
• Kimberley Group Training
• Charles Darwin University
• Berry Street
Positive Ageing
• Mercy Health & Australian
  Catholic University
• LifeCircle Australia
• National Stroke Foundation
Living With Disability
• Lifestart
• Scope (VIC) Ltd
Research and Development Fund
• Australian Centre for Non-Profit
  Studies
• Many Rivers Finance
• Human Rights Law Council.

2011 One-off Grants
• State Library of Victoria - $50,000
  - Children’s Book
  Festival & Laureate Program for
  the disadvantaged
• Australian Indigenous Mentoring
  Experience - $50,000 - Site
  Partner for AIME program based
  at Sydney University - 100
  Indigenous secondary school
  students
• Baptist Community Services
  - $50,000 - Life Care
  Employment Ventures - Life-skill
  training and mentoring program
  for people with mental illness
• Western Chances VIC - $50,000
  - 55 new and renewal
  scholarships plus 15% for project
  delivery costs
• Mallee Family Care - $50,000
  - Disadvantaged kids -
  Indigenous community centre in
  Dareton
• YWCA NSW - $47,800 - In-
  School Mentoring Program for
  transition to high school for ‘at-
  risk’ kids
• EW Tipping Foundation
  - $36,000 - Peer support
  program for fathers of kids with
  disability
• Heal for Life - $35,000 -
  Intervention for teenagers and
  adults who suffered childhood
  trauma
• Satellite Foundation - $33,500
  - 2 x part time consultants
  for 9 months plus promotion,
  marketing and website
  development
• Ardoch Foundation - $30,000 -
  First phase Ardoch’s Education
  Support Centre in Sydney -
  Daystar Foundation + Ardoch in
  Sydney
• Social Ventures Australia – Big
  Picture Australia - $30,000
  - SVAC and SVA services to
  support BPEA in FY12 funding
  plan/pitch, funding strategy, and
  governance review
- Social Ventures Australia - Gambina Project - $30,000 - Improved reporting of the Indigenous people undertaking study or in employment
- Fremantle Children’s Literature Centre - $25,000 - Young writers’ Day Program Perth
- Surf Lifesaving Australia - $25,000 - Pilot project to educate children from CALD communities on surf safety
- Women with Disabilities Australia - $25,000 - Training program for health workers on disability and gender
- General Sir John Monash Foundation - $25,000 - Construction of an on-line donations mechanism; bequest printed promotional material; and fundraising consultant
- Autism Spectrum Australia (ASPECT) - $25,000 - Specialist therapy programs for intellectually and physically disabled children in schools
- Lord Somers Camp - $20,000 - Camp diversity program for children with a disability - 80 children and 100 volunteers
- Opera Australia - $20,000 - Camp diversity program for children with a disability - 80 children and 100 volunteers
- Mittagundi Camps - $10,000 - Scholarships for 30 disadvantaged kids for outdoor education
- EMBA Class 2004 – Melbourne Business School - $25,000 - Financial support for MBA students on social impact engagements
- Australian Scholarship Foundation - $40,000 - Free or discounted executive management and training programs in a range of management disciplines to directors and staff of NFPs
- Brain Institute Queensland University - $43,000 - Postdoctoral Fellowship at the Centre for Ageing Dementia Research (CADR)
- Deafness Foundation - $50,000 - Deaf & hearing impaired research and equipment
- Pain Management Research - $50,000 - Post-doctorate salary support into chronic pain
- Walter Eliza Hall Institute - $50,000 - Post-Doctorate Fellowship in Rheumatoid Arthritis in the Inflammation Division under the supervision of Professor Ian Wicks
- Royal Womens’ Hospital - $50,000 - Clinical Support Nurse - education/clinical support in Menopause Symptoms after Cancer Clinic
- The George Institute for Global Health - $40,000 - Yoga Program for people 65 yrs + research to reduce falls, seed funding before
- The Gathering Place - $37,500 - Health services for Indigenous people in Western Melbourne
- Social Ventures Australia - Lifecircle - $35,000 - Empowering Seniors through End of Life Support
- RMIT Global Health - $50,000 - Pilot sustainability project PNG and evaluation
- Emergency Architects - $50,000 - PNG East Awin Water and Sanitation
- Indigenous Art Code - $25,000 - Manage customer relations, generate and distribute comms, track and monitor complaints and dispute resolution and communicate with external stakeholders and potential members
- University of Technology Sydney - $30,000 - UTS Not-for-Profit Sector Management Development Program
- Trust for Nature - $25,000 - Private Land Conservation and analysis of national and international land-based taxes
- Lizard Island - $25,000 - Purchase of research boat
- Bush Heritage - $25,000 - Remote area Yourka Reserve QLD, power supply
- Zoos Victoria - $25,000 - Early childhood play and interaction with ground, trees and water and how animals make their homes
- Oncology Children’s Foundation - $25,000 - Childhood Cancer Cytoskeleton Consortium (OCF-C4)
- Princess Margaret Hospital for Children Western Australia - $28,750 - Cardiology equipment (infrared monitor) for WA 100 children with heart conditions who have had cardiopulmonary bypasses
- Juvenile Diabetes Research Foundation - $29,540 - Understanding kidney failure in Type 1 Diabetes and interventions to prevent and slow kidney damage
- St James Ethics Centre - $25,000 - Promoting the Ethi-call Centre - a hotline for confidential advice on ethical dilemmas
- The Australian Ballet - $50,000 - ‘Out There’ Dance and Movement Education Project
- Bell Shakespeare Company - $25,000 - Creative Capacity Building Programme -eight actors/arts educators - learning programmes nationwide
- Museum of Contemporary Art Australia - $50,000 - one year pilot - 52 free creative sessions for disadvantaged young people (shortfall funding by MCA)
2012 One-off Grants

- The Funding Network - $20,000 - Pilot study to establish Australian franchise
- Lowy Institute - $25,000 - New Voices Symposium in PNG
- Swinburne University of Technology - $35,000 - Analysis of National Probate Data to examine bequests
- Lifeline - $50,000 - Strategic review of national shop franchise
- Hear and Say - Centre for Deaf Children Limited - $50,000 - Online training programs for people working with children with disabilities
- Ability Technology Ltd - $75,000 - Online and electronic communication tools for people with disabilities
- Epworth Medical Foundation - $50,000 - Rehabilitation programs using electronic games technology
- Hibernian (QLD) Friendly Society Ltd - $55,000 - SONA without Borders
- Royal Australian College of General Practitioners - $43,000 - Advanced Care Planning Project
- Churches of Christ in Queensland - $50,000 - The Cottage Life Project
- Port Kembla Community Project Inc. - $25,000 - Community Undertakings Project
- Social Ventures Australia - The Community Development Foundation - $50,000 - Existing partnership Collaboration to assist CDF form a structured business strategy around their growth plans
- Mission Australia - $50,000 - One-off grant to support their highly successful Charcoal Lane hospitality training and work placement program
- The Council of St Andrew’s Cathedral School - $32,000 - Supporting a successful mentoring program for indigenous Sydney children from Years 7-12
- White Lion Incorporated - $20,000 - Expansion of existing intervention and mentoring program in conjunction with Koori Education Links Program to reduce prevalence of Indigenous youth in the criminal justice system
- The Kokoda Track Foundation Ltd - $200,000 - Kokoda College. Village based teaching facilities in PNG.
Important Note:
Nothing contained in the information constitutes investment, legal, tax or other advice. The information in this document has been prepared without taking account of your financial situation or needs. Before acting on the information, you should make your own assessment and take independent professional advice to consider its appropriateness to your situation.
The Trust Company (Australia) Limited ABN 21 000 000 993 AFSL 235145.
For more information please contact:
Simon Lewis,
Head of Philanthropy & Community
slewis@thetrustcompany.com.au
+61 (0)3 9665 0211

THE
TRUST
COMPANY