

Changemakers Australia – Advocacy and Philanthropy Workshop

Perspective from Philanthropy Australia **By Gina Anderson, CEO Philanthropy Australia**

Thank you Marion, and thank you to Changemakers for including me in today's seminar.

I'd like to begin by acknowledging the traditional owners of the land on which we meet, the Wurundjeri people of the Kulin Nation, and pay my respects to their elders past and present.

Introduction

Ladies & Gentlemen,

Advocacy is not a new concept to the philanthropic sector - some experienced philanthropists see it as one of philanthropy's most important roles. While those philanthropists have supported not-for-profit organisations to build research capability, community facilitation and advocacy skills in their quest to make substantial change, this is not the norm. We live in a society where everyone wants everything NOW. Many philanthropists want to know that their money can solve the "problem" in one year, three years, five years.

Advocacy in all its guises is difficult work because it is usually long term, taking five, ten or even twenty years - often with little in the way of concrete outcomes - until all of a sudden there is a tipping point, at which change suddenly happens. Advocacy has many players and there many factors beyond any one person's control. Influence is hard to measure and unrealistic expectations are common.

While this sounds a bit negative, with the success of such diverse activities as "An Inconvenient Truth" and Geoffrey Cousins entry into the Tasmanian Gunns Ltd debate at the last Federal election, I believe we are seeing more interest in advocacy in all its forms while acknowledging the inherent difficulties.

Philanthropy Australia's Strategic Plan

In 2007 Philanthropy Australia launched its five year strategic plan. As part setting the Strategic Plan we found it necessary to define Philanthropy from our perspective, and have done as follows:

Philanthropy: "The planned and structured giving of money, time, information, goods and services, voice and influence to improve the welfare of humanity and the community."

At all meetings and conversations with our Members there has been a very positive reaction to our definition of philanthropy, particularly to the inclusion of 'voice and influence'. I think many Trustees feel that the explicit articulation of 'voice and influence' is a key determinant between giving a donation and philanthropy.

Ours Strategic Plan involves 4 priority areas:

1. Representation
2. Grow and Inspire
3. Effectiveness
4. Governance

Under Effectiveness: we see part of our role is to promote awareness and understanding in the role of advocacy and how philanthropists may engage in advocacy activities.



Practical Actions

To do this, we have started by talking about the characteristics of the journey of philanthropy to provide a framework for everyone to understand “structured philanthropy” and its stages.

See slide: 5 Steps of Philanthropy

Step 5: Social Innovation and Public Policy

- Sophisticated & Professional
- Building Scale
- Recasting issue for systemic change
- Seeks and fund ways to leverage own resources through research, advocacy, networks, collaboration and cross-sector partnerships
- Stewardship

This typology helps people identify where they are on the journey – and places the aspiration of Social Innovation and Public Policy as a key part of philanthropy.

Note: I have used the nomenclature on purpose – as we have in our definition of philanthropy. The use of words such as ‘advocacy’ and ‘lobbying’ often create a fear of overt political action which most philanthropists would not be comfortable with, nor would be appropriate under our current tax status.

In many cases, it is in Steps 4 and 5 of the philanthropic journey where the philanthropist ceases to be just a funder and begins to become very engaged, often providing advice, direct intervention and involvement in policy and advocacy – demonstrating all the characteristics of our definition of philanthropy – and by doing so is providing a huge amount of support both directly and indirectly.

Philanthropists want to ‘make a difference’ in an appropriate and effective manner. Some of the common questions asked by philanthropists regarding advocacy include:

- What is the difference between advocacy and organizing?
- What are the particular elements involved in advocacy?
- What are effective mechanisms and when should they be used?

And the big one:

- How do you know you are being effective?

And then:

- With organisations moving into complicated work of advocacy: philanthropists will ask whether they have the infrastructure and the capacity to ensure their work has the best chance of success?

Promotion

As part of our role is to promote awareness and understanding in the role of advocacy and how philanthropists may engage we use all mechanisms at our disposal to provide information and education.

Initiatives include:

- Our latest Journal “Doing Philanthropy Differently”
- Forums eg Caledonia Foundation on Oasis and Homelessness; Changemakers (also sessions in Sydney)
- Philanthropy Australia Conference in October in Sydney will have sessions such as “Beyond Grantmaking”
 - *More than money, convening, integrating research and advocacy, exercising leadership on tough issues, expanding philanthropy through co-funding with other funders, and taking a seat at the policymaking table are all components of a successful strategy. But what is the right balance? How do you weigh the risks and opportunities?*
- Blog and Wiki help people keep up-to-date and connected with most recent news and information – and the Blog also has a specific advocacy feed which users can subscribe to.

For further information: www.philanthropy.org.au - www.philanthropywiki.org.au