

EXECUTIVE SUMMARY

A Rising Tide?

Exploring the Future of Giving
in Western Australia

Project Report 2010



THE UNIVERSITY OF
WESTERN AUSTRALIA
Achieve International Excellence



For it is in giving that we receive.

St Francis of Assisi

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*Wealth stays with us a little
moment if at all: only our
characters are steadfast, not
our gold.*

Euripides

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The way of fortune is like the Milky Way in the sky; which is a number of small stars, not seen asunder, but giving light together: so it is a number of little and scarce discerned virtues, or rather faculties and customs, that make men fortunate

Francis Bacon

1.0 Project background

1.1 How this began

In October 2008 a group of interested community leaders and invited guests (local, interstate and overseas) gathered at the University of Western Australia to discuss the challenges and opportunities available for advancing philanthropy in this State. There was a clear consensus that real and important potential exists to increase philanthropy and that an integrated set of initiatives would be the best way to achieve this.

On the basis of this, the University of Western Australia sought and was awarded a grant from Lotterywest to conduct an exploratory study. The grant was approved in April 2009 and work officially began in early May with Professor Margaret Seares and Ms Sally Edwards as the Project Team guided by a broadly-based expert steering committee.

From its inception, this project has been about how lasting pro-giving cultural change can be achieved in the long term with the ultimate purpose of improved community well-being. The research question was: How do we encourage more, and more effective, giving in Western Australia?

1.2 Terminology

Not-for-Profit

This document has prioritised the terms community sector and not-for-profit which are considered more familiar to the Western Australian audience for which this report is written.

High Net Worth

The term high net worth has different meanings for different people. In Australia it is typically defined as an individual with assets (outside the family home) of over AU\$1.2 million, and/or an annual taxable income of more than \$100 000.

Giving and Philanthropy

To reflect this ambiguity in language, this project has interchangeably used the terms giving and philanthropy, giver and philanthropist. Nonetheless, it is the original meaning of philanthropy, derived from the Latin and Greek that describe the love of mankind and concern for improving the well-being of mankind, that lies behind the intent of this project.

2.0 The desktop research

The project began with a broad initial desktop research phase focused on practitioners, precedents and peers’.

There were six questions driving the overall desktop research:

1. What is happening globally in fields related to philanthropy?
2. What is happening globally in the practice of philanthropy?
3. What is happening globally in the study of philanthropy?
4. What is happening globally in the promotion of philanthropy?
5. What is happening in Australian giving?
6. What is happening in Western Australian giving?

This desktop research phase functioned much like a literature review phase in academic research work or an environmental scanning stage in forecasting such as scenarios work.

Together, these questions generated a wealth of findings which are overviewed on the following pages.

For a more detailed discussion of the desktop research findings, see Chapters 2 and 3 of the full report.

*The best way to find yourself is to
lose yourself in the service of others*
Leo Tolstoy

2.1 Globally:

What is happening in the study and practice of philanthropy

- Trends in related fields included the growth of the concepts of ‘social enterprise’ and ‘social innovation’; convergence between the operational practices of community sector organisations and traditional private sector businesses; ongoing development of the concept of ‘triple (quadruple etc) bottom line’; growth in impact of systems-thinking in terms of the way people look to achieve social change’; the rise of the new economies; social networking technology and its impact; and the increased status and recognition of the community sector as a major player in the community
- In moving on to trends in philanthropic practice, the desktop research found that greater development of partnerships and collaboration between key players; a greater awareness of the role played by philanthropy and philanthropists within communities; more government involvement in support of philanthropic involvement; an expanding use of the internet with existing and new initiatives; a range of new philanthropic models; and significance increase in cross-border or global giving
- Western ‘developed’ economies in particular showed, among other things, a move away from competitive grantmaking models to ‘strategic investing’ models with the related increase in self-evaluation efforts by philanthropy programs, and greater expectations of public accountability for philanthropic decision-making
- The desktop research also found a much greater research focus on philanthropy since the 1970s, broadening from sociological and economic focus to be more global and multi-disciplinary. Indeed the gap between the practice of philanthropy and the study of philanthropy has narrowed significantly to the point of blurring roles. is now driven outside the university system with an emphasis on learning in order to guide practice. With the study and development of philanthropy, as with other fields of learning, there is a clear and strong trend towards embedding ‘cross-pollination’ between the academic and independent research sectors as well as business, private equity and, to a lesser extent, government

Today’s business/non-profit partnerships are leading the biggest change in philanthropy since the rise of the foundations 100 years ago-the shift from philanthropy to investment. We are now talking about a true partnership to build community and produce people who are needed by healthy businesses and a healthy society.

Peter F. Drucker.

2.2 Nationally and overseas:

What is happening in the promotion of philanthropy

In terms of the promotion of philanthropy, the desktop research found firstly that there had been a rapid increase how much was being done globally to promote philanthropy but secondly that very little was known about how effective these efforts had been (or were being).

Efforts to promote philanthropy in various countries and communities vary widely but their underlying strategies tend to fall into ten categories:

1. Legal Reform Strategies
2. Market Segmentation Strategies
3. Public Awareness Campaigns
4. Donor Leadership Strategies
5. Donor Education Strategies
6. Strategies to Engage Professional Advisors
7. Place-based Philanthropy Initiatives
8. Peer-based Philanthropy Initiatives
9. Issue-based Philanthropy Initiatives
10. Philanthropic Infrastructure Initiatives

Efforts to promote philanthropy have typically found that challenges fall into four categories:

1. Legal and financial restrictions
2. Cultural attitudes and values
3. Individual engagement
4. Insufficient relevant capacity and infrastructure

How to fund the promotion of philanthropy has been a perennial question across the world. Overseas, the original establishment of an organisation or program is typically funded by a combination of private foundations, corporations or governments via either seed funding, one-off grants or endowments.

Ongoing operation is generally funded by one or more sources such as:

- Donors
- Endowments
- Government support
- Memberships (can cover up to 65% of operation costs in wealthy countries)
- Consulting
- Percentage of funds under management
- Other fee-for-service income streams

Difficulty is the excuse history never accepts.

Edward R. Murrow

2.3 Globally: Lessons for Success

Although few of the worldwide efforts to promote philanthropy have been well studied, the research indicates that the following lessons for success broadly reflect global experiences.

Keep focus on the bigger picture

Overseas efforts to promote philanthropy have found that it is essential to ensure that the focus stays on the 'big picture' both in terms of the ultimate long-term aim of philanthropy itself but also in keeping a careful, constant link with the context in which their efforts operate. In doing so, the lessons learnt from these efforts include the following:

- Work with cultural and regional differences
- Remember the role of civil society – now and in the future
- Ask “What works?”
- Look for the leverage points
- Invest in synergy with other initiatives – now and in the future
- Maintain the long view

Build and share the knowledge

Knowledge has been found to be key to promoting philanthropy and the following have proven particularly effective in helping to build and share information and wisdom as well as knowledge:

- Survey studies to set quantitative benchmarks
- Support with in-depth, rigorous, qualitative analyses
- Openly celebrate philanthropy of all forms
- Create momentum for connections
- Build traditions of giving
- Focus more on the quality of philanthropy than on its quantity

Expand the conversation

Promoting philanthropy is essentially an exercise in engagement. Overseas experience has proven that this engagement cannot be engineered, forced or controlled; it can only be facilitated - with a wide variety of people, in a wide variety of ways. This can be thought of as expanding the conversation and some of the most effective ways to do this include:

- Engage multiple constituencies in all sectors and levels
- Be a genuine portal; help others connect beyond their own sphere of contact/influence
- Promote wide philanthropic engagement through the community
- Encourage new approaches and investment strategies

2.4 Nationally: What is happening to giving in Australia

In Australia, giving has risen consistently for many years, not only in amounts but also in the number of individuals giving. Despite these upward trends, Australia's average gift per donor is still relatively low compared to other nations and affluent Australians appear to be giving proportionately less than the affluent in other comparable nations. There are notable examples of significant giving but these remain relatively few in number considering Australia's comparatively high number of wealthy individuals and families.

The rise in giving

For example, between 1997 and 2004 the proportion of Australia's adult population donating to charity each year rose from 69% to 87% (a 26% rise) while the amount given rose from \$3.0 billion to \$5.7 billion, a 90% rise (these figures exclude approximately \$2 billion worth of charitable fundraising such as raffles, lotteries, fundraising events and auctions).

Our volunteering rates also rose during this time, in both participation and hours given.

Australia's giving participation rate is only slightly behind that of comparable nations such as the United Kingdom, Canada and the United States and our volunteering rate compares even more favourably.

The question of how much

Australia's average gift per donor is still relatively low compared to other nations. Given our relatively high participation rates and the nature of these statistics, the data suggests that, when compared to their counterparts in other countries, still only a relatively small number of wealthy Australians are giving at higher levels.

Wealthy Australians do not, on average, give much more than the rest of the community. The wealthiest members of the Australian community give, on average, 0.45% of their annual taxable income while the overall national average is 0.33%. This is despite a rapid increase in income and asset wealth over the past decade, especially among Australia's wealthy. There are notable outlier examples of high level giving, especially among those referred to as the ultra high-net-worth, but these are remarkably few.

There has been a marked trend among the world's wealthiest people to give an increasing proportion of their income, and indeed their assets, to common-good purposes. Australia's wealthier citizens therefore appear out of step with their international counterparts who, on average, are increasing their giving significantly along with increased prosperity.

*Rich gifts wax poor when
givers prove unkind.
Shakespeare, Hamlet*

Worth noting:

- In the decade to 2007, Australia's private sector wealth grew dramatically overall but especially for the wealthiest Australians.
- The affluent are wealthier than ever and their wealth is increasing at a faster rate than ever. Both the assets and the income levels of the wealthiest Australians are growing faster than the rest of the community, and from a higher base. For example between 2004 and 2006, average annual household incomes grew by 8% in the low-middle income segments but 13% in the already-high income segment.
- The actual number of people who are considered affluent is rising fast. In 2006 Australia became one of the top 10 countries in terms of the actual number of people considered to be high net worth individuals. This is remarkable because it is in raw numbers, not per capita. In 2006 this sector was estimated to be 1% of the adult population, or approximately 160 000 people. The number of people in Australia falling into the ultra high-net-worth category also grew rapidly to 1200 in 2006.

From *Good times and Philanthropy: Giving by Australia's Affluent* published by Queensland University of Technology's Centre for Philanthropy and Non Profit Studies, 2008.

Sources of giving statistics

Worldwide, there are various challenges to gathering accurate numerical data about philanthropy, and although available Australia-specific research data is of high quality, only a small number of studies have been conducted. Nonetheless, all sources referred to in this project point to similar conclusions, giving us confidence that, although our quantitative data may be thin in places, its consistency gives us reason to trust where it is pointing. The main sources of statistics for this project were:

- *The Giving Australia Report, 2005*
- *ATO Reports on Donations Claimed as Tax Deductions*
- *Australian Bureau of Statistics Reports from 2007*

Prescribed Private Funds and Private Ancillary Funds

Legislation allowing for Prescribed Private Funds (PPFs) in Australia was created in 2001 to encourage wealthy individuals in Australia to create and invest in long-term endowments to support the philanthropic causes of their choice. These funds grew rapidly in popularity and at 1 July 2008 had over \$1.5 billion in assets. This figure is expected to rise rapidly in the coming years. In late 2009, the legislation was amended and these funds are now referred to as Private Ancillary Funds (or PAFs).

The very existence of this legislation and the rise, not only in uptake of this option but in investment of such funds since inception, points to increased interest in major giving among those Australians with the means to do so and augurs well for any efforts to seriously improve major giving in Australia.

2.5 Locally: What is happening to giving patterns in Western Australia

In terms of giving patterns, Western Australia seems to compare to Australia in much the same way as Australia compares to the rest of the world: Western Australia is relatively prosperous, with Western Australians seeming to have high giving participation rates but comparatively low levels of giving.

Despite several important and notable exceptions, the affluent seem to give less than their counterparts in other states, especially New South Wales and Victoria.

In Western Australia, plenty of us give but, on average, we don't give as much as people do in other comparable states

For example, over the past decade, the average annual donation amount appears to have increased faster for the rest of the nation than for Western Australia despite private wealth increasing faster in Western Australia at this time than the rest of the nation.

The affluent in Western Australia seem to give less than in other comparable states.

WA seems to compare favourably to the rest of the nation in terms of the number of people giving, but rather poorly in how much they give. In particular, Western Australians seem to make fewer large donations than would be expected for the state's population and prosperity. Chapter 4 contains detail of per capita giving by Western Australians on a comparative basis with people from the other states.

Volunteering

In general, the statistics for volunteering show less variation between different states and between metropolitan and country communities than the data for monetary philanthropy.

Reflecting on the desktop research

Desktop research about what is happening overseas found that philanthropy is an increasingly influential global force, undergoing widespread and rapid change and gaining a great deal of attention. The same can be said about Australian philanthropy, although, for the most part, less dramatically.

Internationally, efforts to promote philanthropy are limited so far but experience overseas points very clearly to key lessons from which Western Australia can learn. They also indicate potential for Western Australia to effect significant change. The data suggests that there is enormous potential to raise the level and quality of giving, in Western Australia in particular. This trend seems to be already evident elsewhere in Australia and there is the opportunity to not only mirror but to amplify this for Western Australia. Much reassurance and encouragement can be drawn from the fact that in some important instances, Western Australian philanthropic thinking and practice is nothing short of world class: the challenge is to do as the venture philanthropists advise and 'scale up'.

Overall it points towards the potential value of a well-structured, well-planned and well-operated system of interventions designed to work together to actively promote philanthropy and to encourage a more philanthropic culture to emerge in Western Australia.

For a full summary of the findings from this phase, see Chapter 4 of this report.

3.0 The consultation

The next phase of the project was a consultation process designed to ensure maximum relevance of this project’s findings for Western Australia. More than fifty people were involved in the consultations, representing a wide range of experiences and perspectives across the categories of givers, receivers and stakeholders as well as the private, public and community sectors. The key questions included:

- What is different about Western Australian philanthropy? What is the same as elsewhere?
- What would help existing Western Australian philanthropists to increase involvement?
- What would help those already considering philanthropy?
- What would encourage more people to consider philanthropy?
- What would help our community sector to benefit more from philanthropy?
- What works elsewhere which might work here?
- What has not been tried elsewhere (or tried and failed) but might work in Western Australia?
- What does our proximity to Asia (geographic and economic) mean for philanthropy?
- What does the rise of cross-border (international) giving mean for Western Australian philanthropy?
- How does and can Lotterywest affect philanthropy in Western Australia?
- What does blurring between business and the community sector mean for Western Australia?
- How should we participate in and benefit from developments in global philanthropy?
- What would success of this project look like? What would the essential ingredients be?

For a full summary of the findings from this phase, see Chapter 4 of this report.

The data on Western Australian giving mentioned earlier provided a backdrop to the interviews and workshops which were a major part of the project and which are covered in detail in Chapter 4. This project found a very high level of alignment between the views of even diverse participants. For example, both givers and receivers each made similar observations about their own and each other’s fields. Confidentiality has been maintained at all times. No input is attributable in any way.

Some of the more common themes about how people see our current giving culture were:

<i>We are moving away from</i>	<i>We are moving towards</i>
Patronage model of philanthropy	Hands-on engagement
Feel-good-and-forget giving	Outcomes-focused giving
Allegiance to one or two causes	Search for opportunities to make a difference
Project focus	Emphasising organisational capacity
Giving to alleviate symptoms of a problem	Giving to address causes of problems
Charity or ‘gifting’ mindset	Investment mindset
Government delivery of services	Outsourcing publicly-funded services

3.1 The top twenty things people think would help

Below are the twenty ideas which the consultation phase found had the most support in terms of what people think is needed/would be effective in promoting better giving in Western Australia:

1. Creating a Social Exchange portal for Western Australia
2. A public campaign promoting giving in general as well as specific types of giving
3. Guest speakers
4. Research projects specific to Western Australia or collaboration on national/international research
5. Peer learning programs for Givers and for Receivers
6. Focal point for liaison with State
7. A network for givers
8. A network for receivers
9. Ongoing development and provision of a knowledge base of resources
10. Development and supply of support resources for professional advisors
11. A Good Giving website
12. Joint initiatives with relevant organisations
13. An annual celebration Festival of Generosity, including awards program
14. Ongoing publicity focused on examples of real life stories of giving
15. Specific projects such as a Giving Circles program
16. A thematic advocacy program for main areas of philanthropic focus
17. Recruitment and mobilisation of ambassadors and champions for giving
18. A Youth Corps project for post secondary young people
19. A school-based education program linking with service learning
20. Specific offerings for specific audiences such as peer-based giving initiative

3.1 The issues that matter most

Those involved in the consultation phase felt that any result of this project should:

- Openly promote all forms of giving by all parts of the community
- Target specific types/sources of giving through different programs over time
- Be practical; about real-life action for donors and receivers
- Be independent (and seen to be) of any agenda, approach or philosophy
- Be both responsive and proactive
- Be structured so as to facilitate relationships between givers and receivers
- Focus on communication techniques to engage people
- Take a long-term, capacity-focused approach
- Integrate efforts across several fronts (e.g. with different target markets) over time
- Acknowledge that real effectiveness requires both good giving and good receiving
- Actively link with all levels of government and work interstate and overseas
- Work closely with those who do or could facilitate and promote giving

3.4 The risks of concern

The risks people are concerned about include the following:

- Silver bullet thinking, especially about a portal
- Not focusing enough on generating and sharing knowledge
- Underestimating the power of stories
- Losing sight of the power of relationships
- Focusing too much on certain types of giving, rather than all forms
- Forgetting the people who do not fit the so-called A-List profile or do not live in certain suburbs
- Losing sight of the “A rising tide lifts all boats” approach
- Forgetting that recipients are also givers, and givers are also recipients
- Government (especially State) getting involved and reducing effectiveness or seeing philanthropy as an opportunity to withdraw from existing funding responsibilities
- Too-high expectations in terms of how quickly our giving patterns can be improved

3.5 The possibilities that inspire

The opportunities people see as particularly valuable include the following:

- Western Australia could build on its tradition of widespread generosity and unique assets in a way that dramatically improves giving performance and effectiveness. These assets include our prosperity, our connectedness, the existence of Lotterywest, and some of the world’s leading corporate citizenship efforts, as well as large Native Title funds. Many people see Western Australia as having the potential to have the best performing community sector in the nation.
- The possibility that efforts to improve giving could improve the quality of and support for community sector governance in Western Australia
- The potential to generate truly valuable research about philanthropy and the community sector and their roles in addressing social and environmental problems
- The unprecedented nature of this project itself and the opportunity for Western Australia to do something brave and different in terms of how we develop our philanthropy and the impact this could have on generations to come
- The possibility that, by focusing on what we give, how we give it and, importantly, on what we do with those gifts, we could help ourselves discover what we want our State to be and how to attain this.
- The potential for development in philanthropy to make a significant difference to the challenge of Aboriginal disadvantage in Western Australia
- The possibility that getting better at giving will help strengthen our relationships with other states but also with other people, companies and even countries, especially in the Asia-Pacific region

The barrier to change is not too little caring; it is too much complexity.

Bill Gates

4.0 Implications for Action

Before making any recommendations, the Steering Committee considered one preferred future scenario (see below) and four hypothetical strategic scenarios of what approach could be taken to enabling that preferred future to emerge (see Chapter 5 for details).

The preferred future or ‘success scenario’:

What would a giving culture mean?

Philanthropic giving of all forms and levels has come to be seen as a normal part of life in Western Australia, as part of our identity. Giving of what you have (time, finances, resources and opportunities) is now part of the social fabric of various communities within Western Australia. Giving of yourself is seen as an evolving lifelong experience, regardless of socio-economic situation.

In keeping with their egalitarian ethic, Western Australians have come to see giving as of benefit to the donor as much as to the recipient. The ethos is that all well-intentioned giving is worthwhile and that everyone can give. It is well recognised in Western Australia that giving is a wonderful way of building community connections, not least your own. Parents, especially parents with significant financial resources, build giving responsibilities and other forms of community engagement into their family cultures.

People concerned about the effectiveness of their giving are able to access information and connect to networks of other committed givers. They come together often and enthusiastically in both formal and informal ways to share experiences and offer support.

Government considers the implications of policy and practice on private giving, working to complement, not control, and collaborating to ensure greater community benefit from both government funding and private giving. Community sector organisations are better able to access information and support for their governance, management, development and service delivery. The sector has gone beyond avoidance of duplication to a phase of focusing on working together and, where appropriate, changing to maximise their community contribution. The community sector works from an income base of greater capacity and sustainability. The sector can better advance its purposes and is more able to positively affect quality of life both in the present and for future generations.

Overall, Western Australia’s giving rates now compare favourably nationally and worldwide. In particular, there has been a change in engagement among those individuals, families and groups with greater financial wealth: more people in this category are now engaged in community challenges in significant ways, and not only as financial donors. Western Australians have come to feel pride in the value placed here on private giving as well as the benefits this has for our prosperity and quality of life. Western Australia’s national and, importantly, international reputation has been enhanced by success in building not only generosity but, more importantly, community connectedness and quality of life.

4.1 Decision-Making Factors

In making its recommendations, the Steering Committee made reference to the following conclusions from the research:

Strategic Roles

The desktop research and consultation have made it clear that the most effective result from this project will be one that results in a combination of four strategic roles:

- Collaborator
- Connector
- Convenor
- Communicator

Offerings

One of the findings is that all the recommended functions should fall into one of four types of offering:

- Services to support givers and receivers
- Help to create and build better relationships
- Better knowledge and better access to it
- Initiatives to build engagement across the whole community

The Steering Committee also found that any discussion of the options arising from this project must acknowledge that others have been thinking about and working on a similar path in recent years, specifically on the concept of a Centre of Excellence.

*They who give have all things,
they who withhold have nothing*

Hindu proverb

Essential Criteria

Based on the desktop research and stakeholder consultation, the following features were considered essential to the effectiveness of any initiatives arising out of this project:

- Potential to integrate several programs and initiatives for both givers and receivers
- A broad focus on all forms of giving by all parts of the community
- Strong independence with no obligation to any particular agenda, approach or philosophy
- A brief which allows for being both responsive proactive
- A strong communications focus
- Structured and resourced for a long-term approach across a variety of community sectors
- Governance team chosen for their ability to inspire trust across a wide range of sectors
- Scope to build and share knowledge and link to action: to drive both theory and practice
- Relationship focus
- Ability to be specific to the Western Australian context
- Potential to work across sectors: public, private and community (including universities)
- Capacity to evolve in response to changing circumstances and community needs

Core Functions

Many initiatives were suggested during this project but these have been summarised down to the following functions are those which, together, offer the best potential for effective and lasting change in Western Australia's giving:

- A single Giving Exchange offering a connection or matchmaking service
- A portal service aimed at making it easier to access knowledge about giving
- An ongoing communication program promoting giving
- Engagement programs for specific demographic groups including schools
- Research (local or collaboration on national/international projects)
- Peer Learning programs and facilitating ongoing networks for givers and receivers
- Focal point for liaison with State and Local Government
- Development and supply of support resources for relevant stakeholder groups
- Active collaboration including joint ventures and the hosting of programs
- Focal point for connection with relevant national and international organisations

*From those to whom much is given,
much is expected.*

Source unknown, often
attributed to Mary Maxwell Gates

4.2 The Proposed Path Forward

In light of the findings from this project, and in order to realise the aspirations of the wide range of people we spoke with, the Project Team and Steering Committee together propose the following recommendation:

Establishment of a new not-for-profit, but time-limited, entity responsible for working to encourage more, and more effective, giving in Western Australia. It is proposed that this new entity would:

- Be a community resource whose mission is to support, nurture, facilitate, promote and otherwise encourage long term cultural change in attitudes, actions and behaviours about giving.
- Focus on the four roles of convenor, collaborator, connector and communicator.
- Be governed by an independent Board of Directors chosen for their individual credibility, skill and expertise and not by their representation of a particular organisation.
- Begin small with only a small staff with other staff recruited on a contractual, program-by-program basis.
- Be structured with reference to Centre of Excellence models especially in terms of developing a strong medium-long term research program of national/international significance. Be therefore constituted to emphasise a consortium-based approach and to, wherever possible, work with existing organisations and programs rather than competing with or duplicating them.
- Optimise cost-effective communication tools including website resourcing and online communications.
- Learn from the experiences of other relevant organisations and initiatives, past and present.
- Be based on a 'learning by doing' approach and be framed as a time-limited, possibly five year, project rather than a new organisation assuming and working towards achieving it's own perpetuity. Towards the close of the project those with the governance responsibility for the project could then make the best decision about options for the future based on the lessons learnt along the way.

This proposal is recommended for several reasons but by far the most important is that it is seen as by far the best available option for achieving the change in momentum on giving patterns that this research has found is needed in Western Australia.

Further details of the rationale for this recommendation is provided in Chapter 6 of the full report.

The name

For the purposes of this document, the entity will henceforth be referred to as Giving West as this is a term which has already been used in this project. Please note that this is not in any way a decision or recommendation for a name; Giving West is being used here only as a neutral placeholder or working title.

The organisation's name should be decided by the new Board with the advice of relevant experts.

The consortium approach

It is recommended that Giving West be established through a consortium of relevant organisations. The number is to be decided but should be kept manageable to aid both administration and effectiveness.

Purpose(s) of the Consortium

1. To guide the most effective development and operation of Giving West and its initiatives;
2. To reduce ineffective duplication or dilution of services and programs; and
3. To enable Giving West to better play a convenor role.

Principles of the consortium approach and the anticipated role of consortium members are discussed in more detail in Chapter 6 of the full report.

Governance

It is recommended that Giving West be governed by an independent Board of Directors chosen for their individual credibility, skill and expertise and not by their representation of any particular organisation.

This Board would be self-appointing and be guided by a constitution based on:

- The purpose of achieving resilient, sustained and sustainable intergenerational change towards a more active and involved culture of giving
- The significance of all forms and all levels of giving and community contribution
- The importance of holding to a long-term, big-picture perspective (i.e. not looking for silver bullets or quick fixes) within the context of an evidence based approach
- The stance of facilitating and encouraging (not controlling) all forms of giving and community engagement
- The value of integrating multiple initiatives
- The opportunity of a consortium-based approach which, wherever possible, works with existing organisations and programs, rather than competing with or duplicating them

4.3 Getting from Recommendations to Action

The Steering Committee for this project wants to see action from this project, not just findings and a report. It therefore sees its role as not only producing this report but also to playing a role in enabling implementation to begin. The project needs to ensure a baton is passed on.

The Steering Committee has, in Chapter 6, made a series of recommendations to assist in the effective establishment of the proposed new entity, balancing two different needs: the need to get action and momentum going as soon as possible alongside the need to invest in good governance and eventual good management through getting the establishment phase right. This is summarised in the table below.

Steering Committee (including Project Team) Establishment Tasks	New Board / Interim Executive Officer Establishment Tasks
Recruitment of new Board Members	Development of charter and constitution
Production of final report	Selection/Registration of Entity Name
Recruitment of Pro bono support for naming process and development of initial communication collateral	Decision making about consortium roles, membership etc
Sourcing of philanthropic support to fund establishment phase inc. preliminary website, interim executive officer, small operating budget	Business planning including business model, strategic planning and initial budgets
Communication of recommendation to stakeholders	Selection and briefing of consortium members
Selection and Briefing of Interim Executive Officer	Appointment and briefing of inaugural CEO

To give money is an easy matter and in any man's power. But to decide to whom to give it, and how large and when, and for what purpose and how, is neither in everyman's power nor an easy matter.

Aristotle