

# TANARRA PHILANTHROPIC ADVISORS

YEAR 2 IMPACT REPORT: 2019



Image courtesy Doug Gimsey

**HELPING CHARITIES REALISE THEIR FULL POTENTIAL**

**BY GIVING OUR BUSINESS EXPERTISE AT NO COST**

# OUR PEOPLE



**Tom Forde**  
CEO

Tom Forde's professional career began at PwC, in both audit and consulting to the non-profit, Government and Corporate sectors. During his time in the Sustainability team, Tom furthered his interest in the complementary nature of commercial and social responsibility and grew a passion for providing advice that enhances both of these outcomes harmoniously. Through this work Tom developed a deep appreciation for the positive impact that charities can make. Tom has also worked at BHP in a variety of roles spanning Sustainability & Public Policy, Asset Planning, Strategy & Governance, Corporate Affairs and Health, Safety, Environment and Community. He spent two years leading their Corporate Sustainability Performance and Reporting division. When he is not assisting charities, Tom supports Tanarra's investments in both public and private equity as an Investment Director. Tom holds a Bachelor of Commerce and a Bachelor of Engineering with First Class Honours from Monash University where he also held a sport scholarship. Outside of work, Tom maintains a keen interest in mentoring young professionals.



**Lisa Kingman**  
Director of Impact & Collaboration

Lisa Kingman has 30 years in the community and corporate sector as one of Australia's most respected independent advisors. Recognised in 2018 as one of Australia's 100 Women of Influence for her community work, Lisa has been at the coal face of social change strategies for decades. She's led over 40 corporations and hundreds of charities into mutually beneficial relationships at an estimated value of \$40 million. Lisa is a recipient of a Paul Newman Foundation Innovation Award for her work as co-founder of EdConnect Australia. Lisa is also a founding member of Housing All Australians and has served on a number of NFP boards including Chair, Courthouse Youth Arts and member of the BHP Billiton Community Trust. Lisa's contribution to Indigenous organisations, education, health, social justice and the arts sector can be seen in all corners of Australia. Lisa holds a BA in Fine Art. When Lisa is not championing social change she's dabbling in her art studio or on the bay having a fish.



**John Wylie AM**  
Founder

John Wylie is Principal of investment and advisory firm Tanarra Group. He was previously CEO of the Australian business arm of global financial services firm Lazard. He co-founded advisory and investment firm Carnegie Wylie & Company, and before that was Chair of investment bank Credit Suisse First Boston in Australia. In these roles, John has advised companies and governments globally for over 30 years. John is the Chair of Sport Australia and President of the Library Board of Victoria. Former roles include Trustee of the Rhodes Scholarship Trust at Oxford University, Director of the Melbourne Stars Big Bash League, and Chairman of the Melbourne Cricket Ground Trust. John is involved in a wide range of not-for-profit community activities primarily through The John and Myriam Wylie Foundation. John holds a Master of Philosophy degree from Oxford University where he was a Rhodes Scholar, and a Bachelor of Commerce with First Class Honours from the University of Queensland.



**Myriam Boisbouvier-Wylie**  
Advisory Board

Originally from Monaco, Myriam Boisbouvier-Wylie had her own practice as a lawyer until she moved to Australia in 1996. Myriam serves as Honorary Consul-General of France in which she has created two associations to support French citizens in Melbourne, including the Bastille Day French Festival. Her involvement in French education and community was recognized when she was appointed Knight of the French Order of Academic Palms, and Knight of the French National Order of the Legion of Honour. She also received the Medal of Honour of the French Senate. Since moving to Australia, Myriam has been involved in various non-profit activities on a voluntary basis. She is on the French Australian Chamber of Commerce and Industry; was the Olympic Attachée to the Olympic Committee of Monaco for the Games of Sydney; member of the fund-raising committee of the Eye Research Foundation of Melbourne; and President of the Parents' Association of the French school in Melbourne, before becoming its Honorary President. With John, she established The John and Myriam Wylie Foundation.



**Roger Harley**  
Advisory Board

Roger Harley is a founder and principal of independent corporate advisory firm, Fawkner Capital. Roger has over 30 years' experience as a corporate advisor, managing engagements spanning mergers and acquisitions, equity raisings and corporate growth strategies. Previously he worked for 11 years at Deutsche Bank, and held positions including Director of Corporate and Finance, and Director of Equity Capital Markets. Roger has broad ranging experience as a Director of Government entities as well as a range of listed and emerging private companies. Previous Board roles include Industry Research and Development Board; Innovation Australia and Medibank Private; Clean Teq Holdings; Kakadu Tourism; Yarra Bend Park Trust; and National Financial Solutions. Roger is a Director of The John and Myriam Wylie Foundation and a Board Member of the People and Parks Foundation.

# TANARRA GROUP

Tanarra is a growing Australian/Asian investment and advisory firm that invests in a wide range of early stage ventures, private and public companies in Australia and around the world. [www.tanarra.com](http://www.tanarra.com)



Tanarra Philanthropic Advisors also harnesses the capability and experience of the global Tanarra Group. The Tanarra group has significant financial and business experience and skills in strategy, operations, finance, risk management, restructuring, marketing, industry positioning and strong governance.

**COVER PHOTO: by Doug Gimesy**  
Lizzie Corke and Steve Ras of the Conservation Ecology Centre on the site of the new Wildlife Wonders eco tourism enterprise.

## WHY WE EXIST

Charities are expected to be impactful, efficient, lean, and skilled as they respond to society's significant challenges. However very few can afford to pay for high level and impartial business expertise, the kind usually only available to the corporate sector. While Tanarra does not want to turn charities into businesses, we saw this gap in the market and wanted to help. We exist to support social purpose organisations in realising their full potential.

## WHAT WE DO

We apply the commercial skills, ideas and innovations of some of Australia's most successful investment minds to help charity leaders and boards develop sharper strategy and business models. Primarily on a pro bono basis, we deliver practical, actionable and impartial advice. We ask the tough questions, act as a safe sounding board and provide strategic and financial advice and recommendations.

## WHAT WE DON'T DO

We don't aim to please, we aim to help.  
We don't give cash donations or grants.  
We don't produce management consultant reports.  
We don't fundraise or seek sponsorship on behalf of charities.  
We don't do marketing or social media.  
We don't provide legal or accounting advice.

## POINT OF DIFFERENCE

We're not afraid to ask charities the tough questions or deliver the 'hard to swallow' observations and recommendations. We have no skin in the game and are not looking for ongoing work or contracts. The skill and expertise of our team and the broader Tanarra Group is some of the best of its kind, and usually not accessible to non-profits.

## SUCCESS LOOKS LIKE

Success is an Australian charity sector realising its full potential to deliver significant social and economic outcomes. At an individual charity level, success looks like improved governance, more informed decision making and risk analysis, sharper strategy, robust financial models, expanded program reach or new investments to deliver more change.

“  
TANARRA  
MAY BE  
TINY BUT  
IT'S  
MIGHTY.  
”

Ferdi Hepworth,  
Equity Trustees



## Q & A

# WITH JOHN WYLIE AM

We thought you'd like to hear about what makes our founder tick.

### What does an effective and efficient charity look like?

One that's crystal clear about the need it's addressing and continues to ask itself is it getting the desired change in the most effective way. Is the organisation's mission well defined and does it come before the interests of the organisation? It's not about you, it's about the people you serve. Serve these people well, place them first in everything you do, and you'll have the organisational integrity that's essential to sustainable success. Other questions they should ask themselves include is feedback actively sought from those you seek to benefit, insightful and acted upon, even if uncomfortable? Is your Board high performing? Does it roll up its sleeves and get involved, evaluate its performance bravely and is not obsessed with governance at the expense of helping in practical ways? Is technology embraced for greater efficiencies? Also look at the organisation culture and leadership. Are your leaders the right fit with the right skills, and can they achieve your mission for you? Do they support the people under them, encourage and develop them?

### In 5 years' time what do you hope Tanarra Philanthropic Advisors has achieved?

I want to be able to say we didn't just help a few charities do good work. I hope we can show that the collective impact of our efforts has really shifted the dial on some of Australia's social challenges. Ultimately, I hope we've achieved a model where others in the business community are actively contributing, a model that's standing on its own two feet and not totally dependent on my investment in time and dollars.

### What motivated you to set this up in the first place?

Directors and management teams of for-profit companies have a whole series of advisors they can turn to for trusted advice. But it doesn't exist in the charity sector. We don't want to turn charities into businesses. We want to provide a fresh set of eyes that an external business perspective can bring. It just makes good sense providing impartial advice, skills and expertise to help charities become more effective in achieving their goals.

**The responsibilities and demands on charities to do more with less are staggering. We don't want to turn charities into businesses. We want to provide a fresh set of eyes that an external business perspective can bring.**

### What's your greatest frustration?

Firstly, being able to scale this concept, to deliver more help to more organisations. Secondly, I'd like to see much greater collaboration, beyond co-funding, across Australia's philanthropic sector. There's so much duplication in researching organisations and not enough getting together to share information, experience and skills to collaboratively help address our big issues.

### What have you learnt about charities as a result of this work?

The responsibilities and demands on charities, their leaders and Boards to do more with less are staggering. We're constantly in awe of their stamina and innovation in delivering solutions for Australia's most challenging issues. The other learnings are more about skills gaps like government engagement, financial modelling, big picture thinking and Board effectiveness.

### How do you decide who to support?

At the outset we assess the work they're doing, the people, track record etc. If we're happy with that and think it has great potential then we look at their specific needs and see if our skill base can really add value. If all that is a yes, then we scope the project, agree on the pro bono hours we'll give and engage our team. We also have a network of trusted advisors we run things by.

### Are there any stand-out proud moments?

Plenty. Seeing the Conservation Ecology Centre's Wildlife Wonders enterprise become a reality down the Great Ocean Rd. Seeing Maggie Beer Foundation grow from a few sponsored cooks doing their training to a national model embraced by the Aged Care sector. Seeing Teach for Australia expand into a new state to help more disadvantaged kids. Then there's the ripple effect we're creating with other Foundations who are now turning to us to help some of their organisations.

# WHAT DIFFERENCE ARE WE MAKING?

We asked every charity we supported in 2019 'Did the advice Tanarra provided help improve your organisation's effectiveness in any way, and if so how?'  
83% of charities responded, saying yes and provided anecdotal evidence to support their claim.

Whilst these findings have not been independently evaluated or validated, the following is a summary of the emerging key themes.



## MORE INFORMED DECISION MAKING

as a result of new information provided by Tanarra



## BETTER MONEY MANAGEMENT

resulting from financial models Tanarra developed, unpacked and improved



## MORE EFFECTIVE BUSINESS MODELS THROUGH DEEPER ORGANISATION SELF-REFLECTION

because of tough questions Tanarra posed



## IMPROVED AWARENESS, UNDERSTANDING AND MANAGEMENT OF RISKS

as a result of new information provided by Tanarra



## NEW COLLABORATIONS AND ENGAGEMENT PURSUED WITH LIKE-MINDED OTHERS

because of the introductions and ideas Tanarra provided

# WHO WE HELPED IN 2019

The Abbotsford Convent

Australian Centre for Rural Entrepreneurship

Australian Rural Leadership Foundation

Big Brothers Big Sisters

Breakout Accelerator

Cathy Freeman Foundation

Conservation Ecology Centre

Donate Direct

Ethnic Communities Council Vic

EdConnect Australia

Habitat for Humanity

Housing All Australians

Indigenous Marathon Foundation

Investing For Charity

LifeChanger Foundation

Maggie Beer Foundation

Refugees Welcome Australia

St Kilda Community Housing

Sustain

Teach for Australia

The Funding Network

YMCA Bridge Project

“

TANARRA'S  
ADVICE IS BEST  
DESCRIBED AS  
REAL TIME  
NAVIGATION  
SUPPORT  
THROUGH HOOKS  
AND TURNS.  
THEY'VE ENABLED  
EFFICIENT USE OF  
OUR SCARCE  
RESOURCES,  
PROVIDED US  
WITH BUSINESS  
EXPERTISE,  
REDUCED OUR  
FINANCIAL RISKS,  
AND GIVEN US  
CREDIBILITY WITH  
FINANCIAL  
INVESTORS. ”

Lizzie Corke, CEO  
Conservation  
Ecology Centre.

# ANNUAL OUTPUTS

83%

We asked every charity we supported in 2019 'Did the advice Tanarra provided help improve your organisation's effectiveness in any way, and if so how?'  
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\$329,000



COMMERCIAL VALUE OF TIME DONATED

604



HOURS OF FREE BUSINESS ADVICE GIVEN

22



CHARITIES SUPPORTED

\$132,963



DIRECT OPERATING COSTS

Costs do not include the broader Tanarra team or office overheads

## OUR SKILL SET

### MOST FREQUENT ADVICE DELIVERED



## FREE TOOLS & TEMPLATES CREATED AND SHARED



- Strategic Plan on A Page Templates
- Board Charters and Health checks
- How to Pitch to investors resource



“

GREAT ADVICE AND PRACTICAL APPLICATION WHEN CONCEPTUALISING AND DEVELOPING A PRICING STRUCTURE FOR EDCONNECT.

”

Gerri Clay, CEO  
EdConnect Australia

# TRACKING PROGRESS

## WHERE ARE THEY NOW?

Change takes time.

Two years into receiving Tanarra's advice, we take a look at this charity and see how things have changed.



### CONSERVATION ECOLOGY CENTRE

**Wildlife Wonders is a unique \$12 million ecotourism social enterprise in development by the Conservation Ecology Centre (CEC). It's set on 50 acres on Victoria's Great Ocean Road. Tanarra has provided business and financial advice to CEC on Wildlife Wonders for two years.**

**We check in with Lizzie Corke, CEO.**

#### **How are things progressing?**

In the last twelve months we've shifted from having 60% of the required funds secured to 100%. Building and ground works have been going at a frantic pace and the site is fast transforming into our vision. We're now focussed on the operational aspects of the enterprise. It's all very exciting and we're on track for a 2020 opening.

#### **How has Tanarra's advice continued to translate into positive impact for CEC and the community?**

Tanarra's advice is best described as real-time navigation support through hooks and turns. They've enabled efficient use of our scarce resources, provided us with the high level business expertise that we needed, reduced our financial risks, and given us credibility with financial investors. Tanarra initially helped us refine our business plan and financial model and in the last 12 months we have built on that to prepare for the operational phase including considerations like management structure, staffing, budgets, business development and marketing, and best use of the physical assets like the cafe, retail outlet and visitor centre. All this will benefit the community and the environment in the long term.

#### **What outcomes do you hope to be sharing in 2020?**

Wildlife Wonders is open and thriving and there's new awareness about our biodiversity and the need to protect it. Our visitor numbers and financial projections are on track, we have an amazing team managing the enterprise and have received significant media attention.



# TRACKING PROGRESS

## WHERE ARE THEY NOW?

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### MAGGIE BEER FOUNDATION

The Maggie Beer Foundation is on a mission to shift the food experiences in Aged Care homes from a clinical model to a hospitality driven and homely model in which food is full of flavour and nutrients while remaining cost effective.

We check in with Peter Kenny, Chair.

#### How are things progressing?

Tanarra presented a range of strategic initiatives in Year 1 of our relationship. A key initiative was to utilise social media to motivate and mobilise the Chefs and Cooks engaged in Aged Care. These people are at the front line and have difficult jobs catering for people with unique needs. We are pleased to have succeeded in securing funding for this. In Year 2 we began development on a series of online training modules. Content for 9 of 11 online training modules is now complete. The development of an Aged Care Community Forum dedicated to Chefs and Cooks is now well underway and will be launched in July 2020. We've also made changes to the way we operate. Delivery of our face to face workshops has also increased. Last year we made big inroads with Maggie appearing at the Royal Commission into Aged Care.

#### How has Tanarra's advice continued to translate into positive impact for the foundation and the community?

Tanarra has continued to help us sharpen our approach and remain focused on the areas where we can get big wins, e.g. getting the quality of food in Aged Care on the government agenda, submitting ideas for a national Aged Care Food Summit, and building a framework for collaboration with one of Australia's largest Aged Care providers. In 2019 we provided training to 105 Chefs and Cooks and 34 CEOs and managers in 3 states which impacted over 100 Aged Care providers and thousands of their residents. Tanarra is currently advising us on improved organisational and Board effectiveness, given we are tiny in terms of paid staff.

#### What outcomes do you hope to be sharing in 2020?

We will have launched our Community Forum and we will be reaching out to every Cook and Chef engaged in Aged Care. Our online training modules will be live. Thousands of Aged Care residents will have improved food quality and experience through our up-skilling of staff. We'll have played a key role in organising and facilitating Australia's first National Aged Care Food Summit. The Foundation will have attracted significant financial support from government, businesses, individuals and foundations. If all that happens, we'll be extremely happy.

# PROJECT SNAPSHOTS

OUR STRATEGIC PRIORITY 1: Strengthen individual charities by helping them to be more effective and efficient.



## AUSTRALIAN CENTRE FOR RURAL ENTREPRENEURSHIP BEING INVESTOR READY

The Old Beechworth Gaol in rural Victoria is home to a thriving hub of tourism and social enterprises under the leadership of The Australian Centre for Rural Entrepreneurship (ACRE). The Gaol and its precinct is well on the way to creating a vibrant social, economic and cultural destination while providing financial security for the organisation. However, to fully activate the site and take advantage of the opportunities such as the Ned Kelly Experience and a bicycle tourism hub, new investment is required.

Tanarra applied a 'potential investor' lens over the project. We asked the tough questions, highlighted gaps in assumptions, unpacked and helped clarify the project's governance. We delivered a workshop to build internal capacity of ACRE in financial modelling and provided feedback on the business case and structure for tourism viability. We reviewed the draft investment prospectus and provided feedback to sharpen the document, for investor readiness.



## SUSTAIN A SHARPER STRATEGY

Sustain, the Australian food network, is a dynamic grass roots charity helping communities to design and create better food systems that generate less waste, are better for the environment, fairer for producers, and increase access to healthy, fresh and locally grown food.

Tanarra reviewed the organisation's messaging and strategy and provided a series of recommendations to sharpen both, including creation of a succinct Plan on A Page. We provided ideas on how to engage with different demographics and consumers who may not be currently engaged in their programs. We connected Sustain to new networks including Health Futures Australia to explore a collaboration, and PWC's On Board program, resulting in a new Board member to match a skills gap. We also explored the concept and shared our knowledge of Social Impact Bonds and Impact Investment to help Sustain assess suitable long term funding options.



## ST KILDA COMMUNITY HOUSING VIABILITY OF COMMUNITY LAND TRUST MODEL

Determined to see Australia's first Community Land Trust established to unlock more affordable housing, St Kilda Community Housing sought Tanarra's independent advice to assess the viability of applying the model on a property they own in Barkly St. The model removes the cost of land from the purchase price - delivering a discount to eligible home owners. The subsidy is retained and passed on when the property is sold.

Tanarra provided analysis to help St Kilda Community Housing better understand the financial and operational inputs required. Our investment team reviewed the 'Invitation to Partner' investment prospectus and assessed the proposed operating model. We also built a financial model to determine its viability for all stakeholders involved: investors, the land owner, housing provider and for the home owner. We are now helping refine estimates for the build and ongoing operating costs. Our analysis will allow St Kilda Community Housing to make a more informed decision as to whether the expected social returns are acceptable for the level of risk and investment associated with this project.

# PROJECT SNAPSHOTS

**OUR STRATEGIC PRIORITY 1:** Strengthen individual charities by helping them to be more effective and efficient.



## TEACH FOR AUSTRALIA

### GEOGRAPHIC EXPANSION

Teach for Australia (TFA) is part of a global movement dedicated to breaking the cycle of disadvantage through teaching and leadership in education. It places and supports degree qualified Associates into schools for a two-year employment-based pathway into teaching in low socio-economic communities, to improve student and school outcomes while developing effective teacher leaders.

The organisation sought Tanarra's review over its strategy and some specific expansion opportunities. We held a workshop with key Tanarra and TFA executives and provided observations and advice. This included recommending a better articulation of the economic benefits and case for support for TFA in regional areas and pointing out the opportunity to focus on technology and STEM in regional schools as an entry point. Subsequently, TFA forged a partnership with the \$50b software company Atlassian to create a coalition of STEM-focused companies to advocate for TFA's expansion into new states, and increase applications amongst STEM graduates and professionals. Encouragingly, there is interest amongst new jurisdictions to explore the feasibility of a 2021 pilot in rural and regional schools.



## BREAKOUT ACCELERATOR

### SUPPORTING RURAL INNOVATORS

The Breakout Accelerator program unearths, connects and mentors rural innovators who want to drive their ideas forward to grow a business whilst staying in the communities they love.

Tanarra gave their expertise and time as part of a review panel whose goal was to provide feedback to all 43 submissions and help select 10 successful applicants. The team analysed the business models, strategies and impact of the submissions and provided detailed feedback to both the innovators and the program managers. Feedback to the innovators offered insights and questions to help strengthen their social enterprises, whilst feedback to the program offered our views on the most prospective opportunities. The successful applicants received a year of incubation and commercialisation support to help grow their enterprises. Pictured (left) are Breakout Accelerator participants John and Nick Mantovani of Cobram Harvest, a new dried fruit processing venture helping to diversify and add value to an existing business, while also addressing significant waste issues in the horticulture sector.



## BIG BROTHERS BIG SISTERS

### COLLABORATING FOR A SUSTAINED FUTURE

Big Brothers Big Sisters Australia (BBBSA) provides long-term, one-to-one mentoring to help change the course of vulnerable young peoples lives. It sought Tanarra's advice as a sounding board for its proposed approach to achieving a sustainable future. After 40 years of operations in the early intervention space, it had a wealth of expertise and was looking to compliment other youth programs while securing more sustained income streams. The BBBSA Board took the progressive decision to take stock and consider the charity's future.

Tanarra looked at the charity's operating model and budget, messaging and case for support, and who else was operating in the mentoring space. We connected them to The Toyota Production System Support Centre, known in-short as TSSC Australia, who donated their time and expertise to streamline and improve efficiencies of BBBSA's matching and mentoring process. In November 2019 the charity officially joined forces with In2Life, a like-minded organisation. This collaboration sees four successful early intervention programs for vulnerable youth, working side-by-side. They share knowledge, practice and centralised services, which materially reduces their operating costs, while retaining their own brands and strategies.

# CASE STUDY

## THE FUNDING NETWORK

“ Tanarra has assessed the viability of our regional and rural expansion model with a fresh set of eyes. Their expertise, observations and analysis has allowed our Board to more effectively consider its decision whether or not to invest in this substantial new program and if so, how it might execute it to maximise effectiveness. ”

Julie McDonald, CEO  
The Funding Network

### About the Charity



The Funding Network (TFN) gives grass roots non-profits and social enterprises access to new funding, skills, volunteers and resources needed to thrive, through its innovative live crowd funding program.

### The need identified

- Assess the viability of expanding TFN's crowd funding program to rural and regional Australia.
- Review TFN's Rural and Regional Affiliate program proposition.
- Consolidate the business case for expansion including operating requirements, financial cost and benefits for those directly involved.

### Advice delivered



SHARPEN STRATEGY



ENHANCE OPERATING MODEL



IMPROVE FINANCIAL MODEL

Probono hours **50+**



Image courtesy The Funding Network

## GROWING GIVING IN REGIONAL AUSTRALIA

The Funding Network received funding for a pilot project to expand its successful model of live crowd funding and collective giving into rural and regional Australia. This pilot was delivered in collaboration with local 'hosts' and aims to help grassroots non-profits access new funding, volunteers and in-kind support. These small organisations together with regional community foundations are looking for different ways to engage new audiences, grow giving and to deepen thinking about local philanthropy.

Tanarra performed an in-depth review of the pilot project, conducting interviews with key stakeholders of regional events and gaining a first hand understanding of the motivations and benefits of bringing the model to their communities. Post review, we provided our observations and recommendations on the viability of rolling this out as a dedicated new program. This work covered the program's business case, operating model, risks, financial viability and execution considerations. We also developed a financial model to help TFN assess the true costs and fundraising return on investment for all parties involved and helped TFN develop a clearer value proposition for each party.

### Charity outcomes

- Independent review of the model's ongoing viability in regional communities.
- Documented stakeholder feedback and recommendations on TFN's model in regional communities.
- A financial assessment tool which captures and determines the true costs and benefits for TFN, Hosts and funders.
- An informed business case and value propositions with which to consider expansion into other communities.
- A deeper insight of the right conditions and requirements for host organisations to deliver the model.

### Community outcomes

- Rural and regional Victoria will benefit from two new TFN Affiliate events in 2020 thanks to funding from the Brockhoff Foundation. We expect a higher % of funds raised will flow through to grass roots charities upon TFN's implementation of Tanarra's recommendations.
- Host organisations in Wangaratta and Glenelg may host their 2nd Affiliate event in 2020, relying less on TFN.

# REFORM & COLLABORATION

OUR STRATEGIC PRIORITY 2: Charitable sector reform for community benefit

OUR STRATEGIC PRIORITY 3: Magnify social change through increased collaboration with others



“I've worked on ten farms in Queensland fruit picking, crating and general field work. I've had severe mango rash and an infection from chemicals. The heat is intense and it's easy to get dehydrated.”

French tourist interviewed by Tanarra (name withheld)

## FARM SAFETY FOR YOUNG WORKERS ON VISAS

### The Need

Young tourists (aged 18 to 30) on working holiday visas are being injured or impacted unnecessarily, while working on Australian farms. For many, this is their first experience on a working farm. Often with poor English skills, a reluctance to ask questions, and little or no safety training, the consequences can be serious. In 2018, Safe Work Australia reported younger workers recorded the highest serious claim frequency rates in the Agriculture industry.

### What we're doing

In collaboration with AusSafe and French Assist we've looked at available facts and figures, considered existing legislation, interviewed French farm workers about their experiences and how they find the work in the first place. We've researched existing good practice e.g. Yellow Card for Banana farms, work-shopped project risks and challenges, and identified some potential improvement opportunities. Such opportunities include introducing a 'Farm Safe' Card, as a pre-placement online training requirement. We are now in discussions with farmers federations, exploring some pilots with farms, developing a financial model, collating training content and determining the most appropriate distribution and delivery model.

### The desired outcome

Improve the education and training of international visa holders prior to commencing farm work by introducing a Farm Safe Card. We hope that this will reduce the risk and impact of injuries both at an individual and system level. Additionally, as there is high competition between host farmers to access a limited supply of skilled seasonal workers, we expect that farms who are known to place higher importance on a safe working environment are likely to have better prospects for securing labour as they will likely become preferred employers for visa holders.



“I don't want a board who I'm just keeping up to date. I want them to roll up their sleeves and help, and I want to be able to sleep at night knowing our governance is robust.”

Scott Watters, CEO and founder  
LifeChanger Foundation

## GOOD BOARDS PROJECT

### The Need

A common question charities ask Tanarra is 'How to improve the effectiveness and performance of their board, beyond legal compliance?'

### What we're doing

We've looked at what already exists in the market place and considered what may be inhibiting take up. We've pooled ideas from our own experiences. Together we're working on three user friendly resources; an annual board health check, a 'warts and all' induction template for prospective board members to capture expectations at the outset, and a 'recruit for success hints' for start ups to think about the immediate and short term challenges and opportunities.

### The desired outcome

Provide free, user friendly and widely accessible Good Boards online tools and templates to charity leadership teams, that result in improved board performance and therefore more effective organisations.

We are also developing this content to improve the effectiveness and efficiency of our conversations with and recommendations to charities we support

# OUR STRATEGY



## PLAN ON A PAGE

### OUR VISION

An Australian charity sector realising its full potential to deliver significant social and economic outcomes.

### OUR MISSION

To strengthen the strategic and financial position of Australian charities, enhancing the great work they're already doing.

## STRATEGIC PRIORITIES 2019 - 2022

### STRENGTHEN

Effective and efficient individual charities

### REFORM

Charitable sector reform for community benefit

### COLLABORATE

Magnify social change through increased collaboration with others

### SUSTAIN

Build a model to sustain and grow Tanarra's impact

## GOALS

Share our commercial skills with CEOs and Boards to deliver tangible change in effectiveness and efficiencies.

Apply our skills to achieve sector wide reform or national impact for community benefit.

Stimulate increased collaboration between business, government, philanthropy and community sectors.

Develop an operating model that has a life beyond its seed funder.

## TARGET

- Our advice results in:
  - Sharper strategies and business models
  - More robust financial models
  - Improved risk management
  - Enhanced operating models
  - Strengthened governance
- We're trusted and respected by those we support.
- We assess and demonstrate our impact.

- Direct our efforts to significant projects that address needs or opportunities that we have identified or that we can add value to.

- Add value to the work of progressive foundations, businesses and their charity partners.
- New examples of collaboration lead to less duplication and greater community benefit.
- Shared pipeline of excellent projects to contribute to.
- Tanarra is respected by its peers as a valued contributor to social change.

- Operating model is robust and effective
- Other businesses are providing pro bono expertise on Tanarra charity projects.
- Options for financial sustainability identified, explored and tested.
- Breakeven by 2022.
- Flexibility to offer pro bono services.

## OUTCOMES

Charities demonstrate improved effectiveness in achieving their mission.

We've helped shift the dial on key social issues and can demonstrate the change.

Results of collaboration clearly outweigh solo effort.

Sustainable model with option to scale and grow social impact

# WHAT OTHERS ARE SAYING ABOUT TANARRA PHILANTHROPIC ADVISORS

“ We've learnt a lot from Tanarra. Their advisory role has been an enormous boost to building our capacity internally, especially with financial modelling. We have a much stronger understanding of what potential investors want and need to see. ”

Matt Pfahlert, Co-founder and CEO  
Australian Centre for Rural  
Entrepreneurship

“ The penny dropped for me about Tanarra's value when their investment team built a financial model to determine the viability of our project idea. ”

Elena Mogilevski, CEO,  
St Kilda Community Housing

“ The William Buckland Foundation has referred projects that we've reviewed and think would benefit from the advice and support Tanarra offers. Their financial and business advice helps take these projects to the next level. It's a collaboration that adds value to all of us. ”

Dr Jane Gilmour, Chair,  
The William Buckland Foundation

“ Tanarra's intimate understanding of the not-for-profit space and challenging yet supportive counsel helped confirm and clarify both our business model and strategic direction. Their support, expertise and guidance was of immense value to the LifeChanger Foundation. ”


Scott Watters, founder and CEO  
LifeChanger Foundation

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