



# ACTIVATE for success in philanthropy

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*filantropia*  
rethinking philanthropy

2020



# Philanthropy is Challenging

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## WHY ORGANISATIONS FAIL

Did not approach philanthropy in a systematic way.

Did not put the donor at the centre of planning, activity, and follow-through.

Did not express urgent, compelling need in a way that cuts through.

DEFINITIONS: ‘Philanthropy’ in the context of this offer and paper means: the activity of securing grants or funding from private individuals or charitable trusts & foundations, including Private Ancillary Funds. ‘Philanthropists’ in this context means: HNW (high net worth) individuals who donate their private funds to charities for the benefit of the community. These donations may or may not come from a charitable foundation or trust or a Private Ancillary Fund.

# Our Experience

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Founders and principals of *filantropia* designed, and personally deliver ‘ACTIVATE’. Based on their 29 years’ combined philanthropy experience, including:

- consulting to HNW donors to design their giving and to find charities that are right for them.
- operating as strategic grant makers to create impact in the community, deploying ~\$800million to charity.
- leadership as board members and executives delivering social impact in both commercial and not-for-profit contexts.

“Through ACTIVATE, we advise and support charities to become more capable, experienced and successful in philanthropy.”

# Activate

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With *ACTIVATE*, we advise and support charities to become more capable, experienced and successful in philanthropy.

It's a time-limited engagement of 10 months, designed to create momentum, and build skills and confidence.

Activate is especially useful to organisations with no dedicated philanthropy resource, where competing priorities must be juggled.



# Organisational Results after time and investment



## applications

- Gained greater ability to self-analyse requirements for grant applications and to identify opportunities to apply.
- Enhance organisational capability in grant application completion.
- Gained improvement in success rate with grant applications.



## systems

- Board's awareness of its role in philanthropy has uncovered new opportunities and new networks.
- Internal organisational alignment on shared responsibilities and roles in philanthropy revenue raising has been achieved.
- Stakeholder maps complete and in use.



## donor management

- Expanded stakeholder network has identified more opportunities for philanthropy.
- New relationships with potential donors have been forged.
- Strategies for key donors have been designed.
- An internal program for donor stewardship has been created.

# Elements

ON-SITE MEETING AT YOUR ORGANISATION BY  
FILANTROPIA TO UNDERSTAND YOUR ORGANISATION AND  
MEET YOUR KEY PEOPLE

EMAIL TO YOUR ORGANISATION FROM FILANTROPIA  
IDENTIFYING YOUR GREATEST OPPORTUNITY

FORMAL TRAINING PRESENTATION ON THE PHILANTHROPY OPPORTUNITY  
DELIVERED TO YOUR BOARD OR TO STAFF

FACE-TO-FACE COACHING  
ON YOUR CHOICE OF TOPICS

SESSION  
1

SESSION  
2

SESSION  
3

SESSION  
4

ACCESS VIA  
PHONE  
FOR  
GUIDANCE  
BETWEEN  
MEETINGS

## SAMPLE TOPICS

Brainstorm, design & review of donor stewardship program  
Design of stakeholder maps  
Review of draft donor strategies  
Review of organisational pitch to philanthropist  
Reviews of prepared or draft grant applications  
Discussion & analysis of failed grant applications

ACCESS VIA  
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MEETINGS

# Principles of Engagement



Your organisational commitment to capitalising on the engagement and pursuing improvement.

# Eligibility & Costs

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## ELIGIBLE ORGANISATIONS:

Not for profits inexperienced or not resourced in systematic philanthropy

## COST:

\$5,500 (+GST)

Contact us to work out if this is right for your organisation:

Robyn Charlwood

[robyn@filantropia.com.au](mailto:robyn@filantropia.com.au)

0417 383 382



# Additional Information

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## CONDITIONS:

Engagement period is 10-months from date of agreement and payment.

All face to face meetings can be held via technology links or at our office in Fitzroy, Melbourne.

Phone and email guidance does not include extensive reading or reviews of material - which is to be confined to scheduled meetings.

Verbal feedback only will be provided, unless stated.

Phone calls will be accepted during regular office hours only, no weekends or any public holidays.

Additional charges for *filantropia* travel to sites outside metro Melbourne will apply and will be negotiated in advance.

## DISCLAIMER:

*filantropia* provides guidance and advice and trains and coaches individuals holding key organisational responsibilities in philanthropy revenue raising.

*filantropia* does not undertake to achieve any financial targets for philanthropic funding set by any organisation participating in ‘ACTIVATE’.

*filantropia* makes no commitment to introduce subscribers to philanthropists and no undertaking to achieve philanthropic funding on the organisation’s behalf.

# About *filantropia.com.au*

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*filantropia re-thinking philanthropy* is an independent professional advisory firm specialising in philanthropy. *filantropia* gives strategic advice and guidance to deliver satisfaction and effectiveness to private philanthropists as well as to companies wanting to engage with them.

We are an independent professional advisory firm specialising in philanthropy advice. Co-founders and directors are Robyn Charlwood and Teresa Zolnierkiewicz. We are based in Melbourne and work nationally. Our experience:

- Private Banking & financial services;
- Not for profit leadership;
- Trusteeship & Wealth Management;
- Running Private Ancillary Funds and charitable foundations;
- Designing philanthropy strategies and programs for impact.



# Credentials



TERESA ZOLNIERKIEWICZ  
CO-FOUNDER, DIRECTOR

An accomplished executive in financial services, Teresa's career has focused on philanthropy advice and the donor experience. She is a social change influencer; co-designing giving strategies with high net worth clients to deliver impact for causes, and to satisfy personal and family aspirations in philanthropy and legacy.

Teresa is a experienced speaker, editor and author on philanthropy and giving. Her reputation in the philanthropy industry is underpinned by skills that include - leadership, facilitation, creativity, client focus, meta-thinking and the ability to set vision, build confidence and empower people, teams and other leaders.

Teresa is the Chair of the Melbourne International Film Festival, and member, Committee of management of the Mirabel Foundation. She holds a Master of Management, Bachelor of Arts and Diploma of Education and is a Graduate of the Australian Institute of Company Directors.

ROBYN CHARLWOOD  
CO-FOUNDER, DIRECTOR

Robyn is an experienced not for profit leader and CEO, philanthropy strategy designer and relationship expert.

Robyn's ability to transfer skills across sectors has seen her traverse from leadership of a major Australian charity to strategy and relationship development in the financial services industry, particularly in philanthropy. Robyn has co-created a global philanthropy strategy for a major corporation, project managed the creation of a world first digital giving tool and developed a philanthropy strategy for Asian high net worth clients.

Robyn uses her business acumen, diverse career experience and strong interpersonal aptitude to skilfully connect people and communities of interest for mutual benefit. Robyn is a Williamson Community Leadership alumnus, Member, Advisory Committee for Ashton Nixon Bequest and Advisory Board Member of University of Tasmania's Wicking Dementia and Research Centre. Robyn holds a Bachelor of Science [Hons], Graduate Diploma of Nutrition and Dietetics and Bachelor of Arts (Fine Arts).







# Contact us

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For a confidential discussion and analysis of your  
organisation and your needs:

Robyn: 0417 383 382  
[robyn@filantropia.com.au](mailto:robyn@filantropia.com.au)

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