

it takes a village

working together to support Geelong's vulnerable



Give Where You Live
Strategic Plan 2012 – 2015



welcome

In recent times Give Where You Live has undergone significant change, in particular a name change after our disaffiliation from United Way. The decision to disaffiliate was not taken lightly but made because, our Board, were determined to honour the work of our predecessors in maintaining local autonomy and ensuring all funds raised within our region stayed in our region.

Give Where You Live has been supporting the Geelong region for nearly 60 years and over that time has raised in excess of \$50 million dollars yet there is still great need in our community.

The 2012 – 2015 Strategic Plan outlines how we propose to address some of the elements of disadvantage in our community and continue to support those most in need. The Plan outlines our key objectives over the next three years as well as providing a set of key metrics by which we will measure our success. Of course our success is inexorably linked to the partnerships that we create and maintain within our community. We could not achieve success without the support of our Corporate Partners and in particular our major partners Ford Australia, Shell, Alcoa, TAC and Fagg's Mitre 10. A key element of our work within this Plan will be to further strengthen those partnerships as well as creating new partnerships with the growing small and medium enterprises that now form a major part of our local economy. Equally important are our partnerships with

the community services organisations that complete the work that addresses disadvantage in Geelong.

These organisations, our Community Partners, are critical to the region and play a vital role in helping us achieve our objectives. We will be working closely with our strategic Community Partners to further develop our Community Impact Model of Grant Making which will be a core objective of this Strategic Plan.

The Give Where You Live Strategic Plan 2012-2015 is a locally focused Plan that aligns with our collective vision for the region. Its title, **it takes a village - working together to support Geelong's vulnerable** recognises that Give Where You Live does not work in isolation. At the centre of our work are the partnerships we create with community organisations, individual donors and corporate supporters. A measure of the strength of a community is the way in which it supports its most vulnerable. Such support does not come from one organisation or individual. It comes from a network of support. It comes from a range of benefactors and it comes from a community in partnership. In reality - it takes a village.

Bill Mithen
Chief Executive Officer

history

The organisation we now know as Give Where You Live was initially formed in 1954 as The Geelong and District Community Chest.

The Geelong and District Community Chest had three major objectives:

1. To raise funds to be held and used in accordance with the directions and intentions of the donors.
2. To disburse these funds either directly or by contributions to organisations to provide relief to diseased, infirmed, incurable, poor or destitute persons.
3. To 'assist in harmonising and making more efficient the work of charitable, philanthropic, eleemosynary and benevolent organisations of Geelong and District'.

In 1979, United Way Australia was formed and between 1979 and 1983 The Geelong and District Community Chest and United Way Australia's relationship grew. In 1983, The Geelong and District Community Chest officially changed its name to United Way Geelong Incorporated. This change signified a major milestone in the history of the organisation.

The affiliation with United Way Australia and United Way Worldwide gave The Geelong and District Community Chest great access to fundraising expertise, new programs and international resources. United Way Geelong established

itself quickly as a major part of United Way Australia and while continuing to operate autonomously for the Geelong region, it grew to eventually represent close to 40% of United Way Australia's income.

2010 saw the beginning of yet another major change. United Way Worldwide decided to only deal with one country body. This meant that United Way Australia would change its model to a more federated operation rather than unique and discreet organisations working in co-operation. Under the new federated model local autonomy and fundraising would be threatened. As a result, United Way Geelong dis-affiliated from United Way in late 2010 to ensure that it would always remain Geelong focused and all the funds raised in our region would remain in our region.

At the campaign launch in February 2011 Give Where You Live Incorporated was launched.

vision, mission, values

Vision

Give Where You Live aims to provide leadership to help create a Geelong and regional community in which all people are able to reach their full potential not constrained by health, education or income disadvantage.

Mission

Our Mission is to create a more compassionate and productive society throughout the Geelong Region by assisting individuals to reach their full potential and overcome health, education or income disadvantage. We are dedicated to making a real difference by:

- Continuing our long heritage of being a responsible and trusted gatherer and custodian of community contributions.
- Selecting and then supporting with grants, the best groups that can provide excellent services that are accessible to those most in need.
- Working with service provider partners to develop a high standard of care, where positive outcomes are clearly evident.
- Ensuring our operating model is effective and sustainable over time by carefully managing resources to achieve long term and high standards of efficiency and governance.

Values

Integrity

We are committed to being honest, respectful, consistent and ethical in our behaviour, relationships and work.

Accountability

We are accountable to our supporters, partners and the Geelong Community. We take responsibility for the stewardship of the funds we raise and will ensure our actions and reporting are transparent.

Excellence

We strive to be the best we can be in all activities we undertake. Consistently questioning our service standards will help us achieve our ambition of continuous improvement.

Diversity

We embrace the diverse nature of the Geelong community. We encourage new ideas and value all opinions because this will better inform our work and increase our connectedness to the Geelong region.

Innovation

Innovation will be a key factor to our success. We will constantly strive for improved, efficient and effective methods of completing our work, engaging our partners and communicating with the community.

Passion

We are passionate about our work, creating sustainable improvement in people's lives, and supporting the Geelong community.

key environmental elements

Give Where You Live operates in a highly competitive not-for-profit environment. Never before have there been so many organisations to which individuals can direct their donations. All these organisations are competing for the donor's attention and ultimately their contributions.

Not only has the not-for-profit landscape in the Geelong region grown but there are also many key factors affecting how Give Where You Live operates.

The following are the key environmental factors, identified by the Give Where You Live Board and Management, which must be considered over the course of this plan as having an influence on Give Where You Live and its operations.



strategic plan

Give Where You live is embedded in the Geelong community through its best practice Workplace Giving program, its relationships with both large and medium business and its partnerships with over 70 local community service providers. Through this unique positioning we plan to:

- Grow upon our strengths and continue to improve the areas in which we are best practice.
- Leverage our community and business relationships to grow our fundraising efforts and organisation and develop new avenues of income.
- Strengthen our position of leadership in the philanthropic sector and local Geelong community.
- Build upon the energy of our name change and increase our awareness and reach.

The Building Blocks of Success

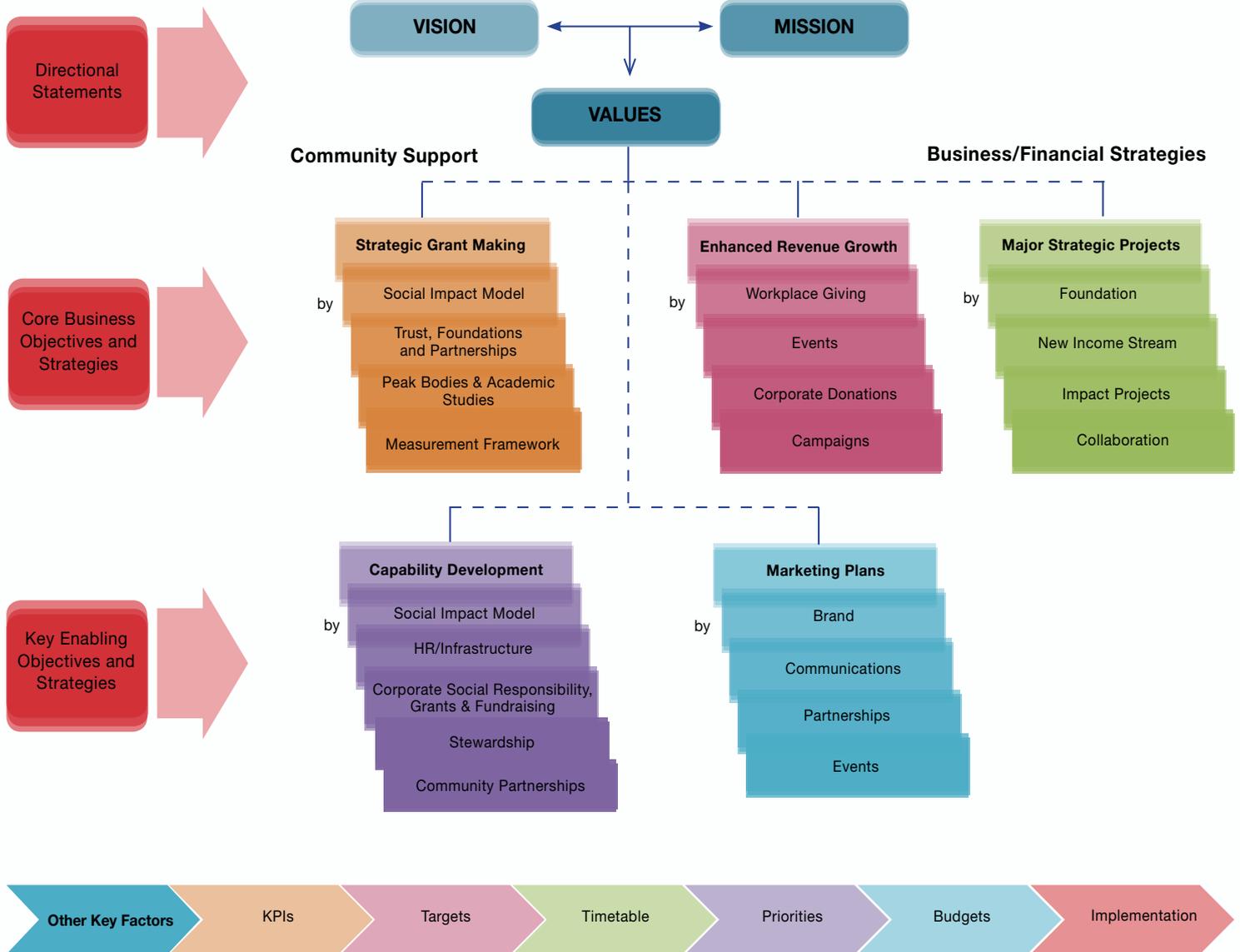
We have identified four key projects that represent significant building blocks if we are to successfully achieve the aims of this Plan. The following four execution elements have been identified as critical to allow progression towards other areas of this Plan. While there are many elements of this Plan it is the following projects that will create a solid foundation for the success of the Plan.



strategy map

The Give Where You Live Strategy Map is a snap shot of our three year Plan.

It highlights how our Vision, Mission and Values form the basis of our 5 objectives and their accompanying strategies.



strategic objectives 2012 - 2015

The following have been identified as our headline Strategic Plan performance metrics:

1. Increase in income of 50% to \$4.2 million.
2. Allocations of \$6 million over three years.
3. Development of Social Impact Model of Grant Making.
4. Increase in investment corpus to \$3 million.
5. Creation of annual regional Social Impact Report Card.
6. Creation of new revenue stream representing 5% of total revenue.

Objective 1.

Revenue Growth

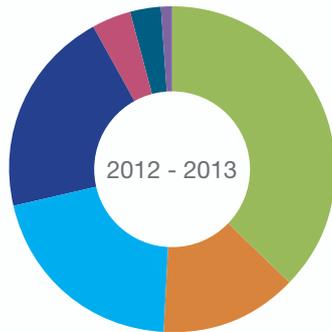
Through increased revenue, improved fundraising and new income streams we will create a new sustainable funding model for Give Where You Live. By 2015 our revenue will be generated from the following avenues:

- Workplace Giving
- Events
- Investment Income
- Corporate Partnerships
- Campaigns and Appeals
- Trusts, Foundations and Bequests
- New Income Stream

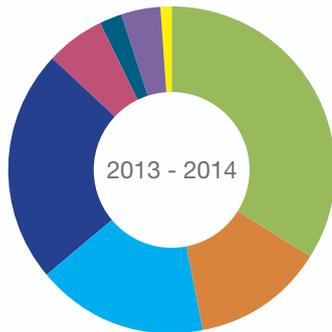
Key Performance Metrics for Revenue Growth:

1. Increase income of 50% to \$4.2 million.
2. Increase in investment corpus to \$3 million.
3. Creation of new revenue stream representing 5% of total revenue.

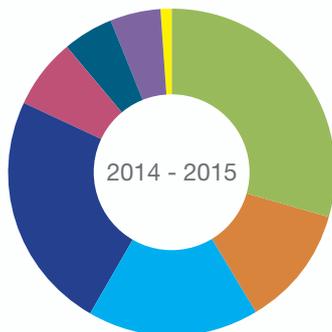
revenue streams



Workplace Giving	38%
Corporate Partners	14%
Trusts & Foundations	20%
Events	20%
Campaigns /Appeals	4%
Commercial Revenue	0%
Investment Income	3%
Other	1%
Total	100%



Workplace Giving	34%
Corporate Partners	13%
Trusts & Foundations	17%
Events	23%
Campaigns /Appeals	6%
Commercial Revenue	2%
Investment Income	4%
Other	1%
Total	100%



Workplace Giving	30%
Corporate Partners	12%
Trusts & Foundations	17%
Events	23%
Campaigns/Appeals	7%
Commercial Revenue	5%
Investment Income	5%
Other	1%
Total	100%

strategic objectives 2012 - 2015

Objective 2.

Capability Development

Through expertise, partnerships, efficiency and professionalism we will become the leading organisation that:

- Provides links between businesses, individuals and community service providers.
- Educates business, particularly small and medium business, about Corporate Social Responsibility.
- Takes regional lead in philanthropy.

This will ensure the continued support, growth of revenue and added sustainability of our organisation.

Key Performance Metrics for Capability Development:

1. Creation of an annual regional Social Impact Report Card.
2. Establish strategic partnerships within the philanthropic sector.
3. Total grant allocations of \$6 million.
4. Increase investment corpus to \$3 million.

Objective 3.

Increased Brand Awareness

Building on our history, reputation and developing future innovative approaches; we will grow our capacity to make a difference and become acknowledged as the leading Corporate Social Responsibility and philanthropic brand in the Geelong Region. Increased recognition and awareness will ensure that our name is linked with our two, inseparable, core functions:

- Effective and ethical fundraising.
- Strategic and effective grant making.

This will allow us to grow our fundraising and grant making and improve our ability to advocate and become an agent of change.

Key Performance Metrics for Increased Brand Awareness:

1. Event income to reach \$1 million.
2. Establishment of two regional fundraising appeals.
3. Increased use and interaction of social media between Give Where You Live and our various partners.

strategic objectives 2012 - 2015

Objective 4.

Strategic Grant Making

Effective and strategic Grant Making is at the core of Give Where You Live. Through the development and implementation of a strategic grant making framework we will:

- Have a greater understanding of the needs in Geelong.
- Improve and measure the impact of our grants.
- Identify the gaps in service delivery and the areas that require greater investment.

This will place us as the leading philanthropic organisation in Geelong, strengthen our ability to fundraise and allow us to increase the value we receive from our grant making activities.

Key Performance Metrics for Strategic Grant Making:

1. Development of a Social Collective Impact Model of Grant Making.
2. Creation of an annual Regional Social Impact Report Card measuring effectiveness and impact.
3. Total Grant Allocations of \$6 million.
4. Establishment of key community sector strategic partnerships.

Objective 5.

Strategic Projects

Through careful planning and thought as well as the allocation of resources, time and human capital to major Strategic Projects, we will ensure organisational growth, stronger advocacy of our mission and a position of leadership in the regional philanthropic and not-for-profit sectors. Through our networks and partnerships we will identify and research major internal and external projects that will:

- Improve our expertise and capacity.
- Grow our organisation organically and through collaboration and partnerships.
- Improve our sustainability.

Key Performance Metrics for Strategic Projects:

1. Increase in investment corpus to \$3 million.
2. Establishment of key partnerships within our Social Impact Grant Making Model.
3. Increased collaboration and partnership within the philanthropic and community services sector.



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Geelong's vulnerable



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