



**Professor Peter Shergold**  
Macquarie Group  
Foundation Chair  
Centre for Social Impact



**John McLeod**  
Director of Philanthropy  
Goldman Sachs JBWere



**Cath Smith**  
Chief Executive Officer  
Victorian Council of Social  
Services



**Vanessa Meachen**  
Research & Training  
Manager  
Philanthropy Australia



**Rachael Simmelmann**  
LBG Manager  
Positive Outcomes



**Lynne Wannan AM**  
Director  
Office of the Community  
Sector

**Tuesday 28 April 2009**

**Hawthorn Town Hall**

**Melbourne**

**8.30AM - 2PM**

**The Asia-Pacific Centre for Philanthropy and Social  
Investment & DVA Navion present**

# Doing More with Less: Making Progress in a Time of Economic Downturn

Workshop for not-for-profit Board members, CEOs and Senior  
Executives

*"I found the workshop to be brilliant. The content and delivery was spot on for my needs and the opportunity  
to network with industry peers was invaluable."*

Brian Klindworth, 2008 delegate & Corporate Development Manager, Cabrini Health.

Hosts:



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**DVA Navion**  
THIRD SECTOR CONSULTANTS



Contact

**DVA Navion (03) 9853 5111 [www.dvanavion.com](http://www.dvanavion.com) [melbourne@dvanavion.com](mailto:melbourne@dvanavion.com)**

# About the workshop

## Background

DVA Navion ([www.dvanavion.com/site/AUS](http://www.dvanavion.com/site/AUS)) and Swinburne University's Asia-Pacific Centre for Philanthropy and Social Investment ([www.swinburne.edu.au/business/philanthropy/](http://www.swinburne.edu.au/business/philanthropy/)) have collaborated on a series of workshops for the not-for-profit sector since 2008. Our modus operandi is characterised by:

- ▶ Our holistic approach to financial sustainability and business development.
- ▶ Our commitment to building capacity.

## Description

In light of recent economic events on the national and international scenes, Australian not-for-profit organisations are calling for specialised assistance to understand the impact of the economic downturn on their activities and to develop the most effective strategies to respond to increasing need for their services in a more challenging funding environment.

This workshop will feature practical strategies and findings from the latest research to answer the following questions:

- ▶ How will the not-for-profit sector's income sources be impacted by the current economic downturn?
- ▶ How will broader circumstances impact individual organisations and how can they formulate effective individual responses?
- ▶ What do funders want to see from not-for-profit organisations in difficult economic times?
- ▶ What are the strategic activities funders are more likely to support at this time?
- ▶ What are the characteristics of organisations that will survive and flourish in times of economic stress?
- ▶ How can an economic downturn be a time of opportunity for the sector?
- ▶ What innovative strategies can be utilised to maintain and even expand operational income in a seemingly hostile climate?

## Speakers

- ▶ Professor Peter Shergold (Macquarie Group Foundation Chair, Centre for Social Impact).
- ▶ John McLeod (Director of Philanthropy, Goldman Sachs JBWere).
- ▶ Cath Smith (Chief Executive Officer, Victorian Council of Social Services).
- ▶ Vanessa Meachen (Research and Training Manager, Philanthropy Australia).
- ▶ Rachael Simmelmann (LBG Manager, Positive Outcomes).
- ▶ Lynne Wannan AM (Director, Office of the Community Sector).

## Who will benefit from the workshop?

Not-for-profit CEOs, Board members and Senior Executives.

# Program

**Tuesday 28 April 2009, 8.30 - 14.00**

8.00 - 8.30	<b>Coffee/tea &amp; registration</b>
8.30 - 8.45	<b>Introduction</b>  Dr. Michael Liffman (Director, Asia-Pacific Centre for Philanthropy and Social Investment) and Colin Baillie (President, DVA Navion)
8.45 - 9.45 Keynote presentation 1	<b>Maximising Social Impact in Times of Economic Uncertainty</b>  Professor Peter Shergold, Macquarie Group Foundation Chair, Centre for Social Impact  <i>The economic slowdown will fuel greater demand for not-for-profit organisations to effectively address our social, economic and environmental problems. In his keynote presentation, Peter Shergold will map out workable strategies to help your organisation deliver community benefit and generate social innovation.</i>
9.45 - 10.00	<b>Morning tea</b>
10.00 - 10.30 Keynote presentation 2	<b>Understanding Trends in Strategic Philanthropy</b>  John McLeod, Director of Philanthropy, Goldman Sachs JBWere  <i>The not-for-profit sector has been inundated with information on the impact of the economic slowdown on their operations. But how to separate the fiction from the facts? This presentation will equip your organisation with factual evidence on the trends, volatility and key characteristics of major income sources (government, donations, investment, etc.).</i>
10.30 - 12.00 Panel discussion	<b>The Economic Downturn: Experiences on the Ground</b>  Cath Smith (VCOSS), Vanessa Meachen (Philanthropy Australia), Rachael Simmelmann (Positive Outcomes), Lynne Wannan AM (Office of the Community Sector), Professor Peter Shergold and John McLeod.  <i>Facilitated by Colin Baillie, this session will invite panellists to answer the following questions:</i> <ul style="list-style-type: none"><li>▶ What do funders want to see from not-for-profit organisations in difficult economic times?</li><li>▶ What key messages would you like to send to organisations operating in the sector?</li><li>▶ Which organisations are doing well and how do they flourish in times of economic stress?</li></ul>
12.00 - 12.30	<b>Networking lunch</b>
12.30 - 13.45	<b>Interactive question &amp; answer session</b>
13.45 - 14.00	<b>Wrap-up</b>

# Speakers

## **Professor Peter Shergold - Macquarie Group Foundation Chair, Centre for Social Impact**



Peter is the Macquarie Group Foundation Chair of the Centre for Social Impact, a cross-university partnership of the business schools at the University of New South Wales, Melbourne University and Swinburne University of Technology. Prior to this he was Australia's most senior public administrator, serving as Secretary of the Department of the Prime Minister and Cabinet from February 2003 for five years. Peter was appointed to the AMP Limited Board on 14 May 2008. Peter was a CEO in the Australian public service for two decades. In 1987 he established the Office of Multicultural Affairs. From 1991 his positions included head of the Aboriginal and Torres Strait Islander Commission, Public Service Commissioner, Secretary of the Department of Workplace Relations and Small Business, and Secretary of the Department of Education, Science and Training.

Prior to joining the public service, Peter lectured at the University of NSW before becoming Head of the Department of Economic History in 1985. He was appointed a Member in the Order of Australia in 1996 and was made a Companion in the Order of Australia in 2007 for public service.

## **John McLeod - Director of Philanthropy, Goldman Sachs JBWere ([www.gsjobw.com](http://www.gsjobw.com))**



John joined Philanthropic Services in 2002 after 16 years in resource equity markets at JBWere. His primary responsibilities include researching and analysing trends in the philanthropic sector; interpreting the findings to provide valuable insights for clients; and forging relationships between clients with a philanthropic interest and the not-for-profit sector. He has completed the newly established Swinburne University postgraduate course in Philanthropy and Social Investment. Following his initial studies in Engineering (Mining) and Commerce, John worked for Mount Isa Mines for five years in a variety of roles including Development Miner, Mining Engineer, Project Engineer and Planning Manager. He later joined Esso Australia as Senior Mining Engineer in the Minerals Department in Sydney, conducting financial and technical analysis on advanced exploration areas. John joined the firm in 1987 and has been responsible for research into BHP (now BHP Billiton) and the

energy sector. He later took on the role of Resource Strategist and Manager of Resource Research within the firm's top-ranking strategy team. After retiring as a Principal of Goldman Sachs JBWere in 2003, John was able to devote more time to both his family's interests in private philanthropy and in a broader education role through Philanthropic Services.

## **Cath Smith - Chief Executive Officer, Victorian Council of Social Services ([www.vcross.org.au](http://www.vcross.org.au))**



Cath has been CEO of the Victorian Council of Social Service for six years, following a wide range of roles in the non-government sector over 25 years. She is keen to help strengthen the community sector's voice in public policy debates, and in relationships with the private and philanthropic sectors, government and the broader community. Cath co-chairs the DHS-Human Services Partnership Implementation Committee and participates in the newly formed Reference Group to the Office of the Community Sector in DPCD. Within VCOSS Cath convenes the Peaks and Statewide Networks Forum, a key network for the community services sector in Victoria.

## **Vanessa Meachen - Research and Training Manager, Philanthropy Australia ([www.philanthropy.org.au](http://www.philanthropy.org.au))**



Vanessa has been Research and Training Manager at Philanthropy Australia, the peak body for giving in Australia, since 1998. Philanthropy Australia's mission is to represent, grow and inspire an effective and robust philanthropic sector for the community. Vanessa provides research and advice to Philanthropy Australia's members, staff and Council, potential philanthropists, policymakers and media representatives. She also conducts Philanthropy Australia's grantseeker workshops.

# Speakers

## **Rachael Simmelmann - LBG Manager, Positive Outcomes ([www.positiveoutcomes.com.au](http://www.positiveoutcomes.com.au))**



Rachael Simmelmann comes from Positive Outcomes, a specialist CSR consultancy. She is responsible for managing the London Benchmarking group (LBG) in Australia and New Zealand and supports a wide range of blue chip corporate clients and large government organisations. The LBG methodology provides a measurement and benchmarking tool which enables businesses to measure their contributions and evaluate the impact of their community investment. Rachael values the transparency, collaboration and openness that LBG provides for its members to share best practice for community investment and CSR. Her involvement in LBG has provided her with significant expertise and experience in understanding some of the challenges and opportunities corporations face with developing and managing social investment programs. In addition Rachael has significant experience working on the ground for international community projects which provides valuable insight and adds value for understanding the varied needs and relationship building between corporations and community organisations.

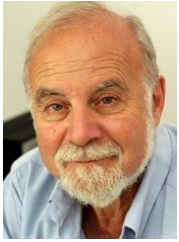
## **Lynne Wannan AM - Director, Office of the Community Sector ([www.dpcd.vic.gov.au/communitysector](http://www.dpcd.vic.gov.au/communitysector))**



Lynne comes to this new role with a background as a policy analyst and manager who has worked as a consultant and community leader and been an adviser to government at local, state and national levels over the past two and a half decades. Lynne has worked in State and Local government and in the not for profit community sector. Prior to taking up this position Lynne chaired the Victorian Government's Children's Council, Adult Community and Further Education Board, Community Support Fund Advisory Council and been a Commissioner on the Victorian Skills Commission. Lynne has also held the position of Deputy Chancellor Victoria University of Technology, Convenor of the National Association of Community Based Children's Services, Chair Community Child Care Victoria and is currently Deputy Chair Western Chances. Lynne Wannan was recognised with an Australia Day award in 2007 for her leadership in community services and education.

# Chairs

## **Dr. Michael Liffman - Director, Asia-Pacific Centre for Philanthropy and Social Investment** **([www.swinburne.edu.au/business/philanthropy](http://www.swinburne.edu.au/business/philanthropy))**



Michael was appointed in March 2001 as founding Director of Philanthropy and Social Investment at Swinburne. Michael has a background in social policy, research and community work. After working with the Brotherhood of St Laurence and the Ecumenical Migration Centre, he became CEO of the Myer Foundation and the Sidney Myer Fund. Michael is a Board member of the SouthPort Community Residential Home, and the Alpine School. Former involvements include membership of the board of the Australian Council of Social Services, the Australian Institute of Multicultural Affairs, the Department of Human Services Ethics Committee, the Community Advisory Committee of the Special Broadcasting Service, and the Immigration Review Tribunal. Michael is a former President of the Australian Association of Philanthropy, and a member of the International Network on Strategic Philanthropy. A list of Michael's publications can be found at: [www.swinburne.edu.au/business/stafflist/staff/mliffman.html](http://www.swinburne.edu.au/business/stafflist/staff/mliffman.html).

## **Colin Baillie – President, DVA Navion ([www.dvanavion.com/site/AUS](http://www.dvanavion.com/site/AUS))**



Colin is an experienced consultant and organisational development professional with over 15 years experience in revenue generation, organisational development and sustainability planning within the not for profit sector in Australia, New Zealand, the United States, Great Britain and South Africa. As an entrepreneur his early achievements include the co-founding of the Sparrow Educational Trust, an NGO based in Johannesburg, catering to the specialised education of thousands of economically disadvantaged and learning disabled youth in South Africa. Colin has a proven ability and track record in securing large business partnerships, sponsorships, philanthropic donations and government grants for his clients across a wide variety of causes and organisations.

# Information & registration

## Date & time

Tuesday 28 April 2009, 8.30AM-2PM.

## Venue

Hawthorn Town Hall, 360 Burwood Road, Hawthorn, Melbourne (Melway ref 45 D10).

## Transport

The venue is easily accessible by public transport (Glenferrie station). The nearest car park is located at 17 Wakefield Street (Premier Parking, \$5.50/day).

Please notify Jason Smith (03 9853 5111 or [jsmith@dvanavion.com](mailto:jsmith@dvanavion.com)) should you require wheelchair access to the venue.

## Fee

We value the importance of making our workshops as accessible as possible to not-for-profit organisations by keeping costs to a minimum.

- ▶ \$210/delegate inclusive of GST.
- ▶ 50% discount for additional member(s) of the same organisation.
- ▶ 10% discount for members of the Victorian Council of Social Services (VCOSS).
- ▶ 10% discount for delegates of the 2008 Swinburne/DVA Navion Workshop Series.

## Takeaway reference material

Delegates will receive a report containing facts and strategies to help Boards, CEOs and Senior Executives effectively deal with the economic slowdown. You can download a free snapshot report containing economic downturn facts and strategies at [www.dvanavion.com/site/AUS/freereport.pdf](http://www.dvanavion.com/site/AUS/freereport.pdf).

## Registrations

Register online at [www.dvanavion.com/site/AUS/cart](http://www.dvanavion.com/site/AUS/cart) (payment by credit card).

For more information on registrations, please contact Jason Smith on (03) 9853 5111, email [jsmith@dvanavion.com](mailto:jsmith@dvanavion.com) or visit our website: [www.dvanavion.com/site/AUS](http://www.dvanavion.com/site/AUS).

## Cancellations & refund policy

Cancellations must be advised in writing at least 5 business days prior to the event in order to receive a refund. If the registered delegate is unable to attend, we are able to accept a replacement delegate.