

“

I think we're good at telling the truth and not sanitising to please the CEO or Board. I hope to look back and see how we've grown the pie for the people charities exist to help, not helped a few charities take market share over others.

”

John Wylie AC
Founder,
Tanarra Social Purpose

REACH US

[Tanarra Social Purpose website](#)

Level 31, 35 Collins St,
Melbourne Vic 3000

info@tanarra.com

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2023 IMPACT REPORT: YEAR 6



Photo courtesy Hotel Etico

HELPING CHARITIES BE THE BEST THEY CAN BE

BY GIVING OUR COMMERCIAL EXPERTISE PRO BONO & LOW BONO

OUR THEORY OF CHANGE



The problem is..

Of the approximately 60,000 charities in Australia, 81% operate on a revenue of less than \$1million.*

A majority of these charities, unless funded by donors, have great difficulty accessing expert commercial advice to grow their impact and continue to help their beneficiaries.



So if we....

... harness the strategic and financial skills of the Tanarra Group and other generous professionals to give pro bono advice so that small to medium impactful organisations can maximise their limited resources;

And if we do this with first hand insights and expertise of our community team.....



The result should be..

The charities we advise now have at least one of the following:

- Better money management leading to an optimal and sustainable funding model,
- More effective strategy and business model leading to informed decision making, improved risk management or deeper organisation self-reflection,
- More robust and efficient governing boards,
- Greater collaboration with like-minded others.



And ultimately lead to...

- Small to medium progressive charities achieving maximum impact with minimum wasted effort or expense,
- The organisations we have advised are realising their true potential to deliver significant social and economic outcomes, and
- Tanarra Social Purpose is seen as a valuable and cost-effective model for social change.

*ACNC Australian Charities Report 9th edn, 2023, www.acnc.gov.au

OUR PEOPLE



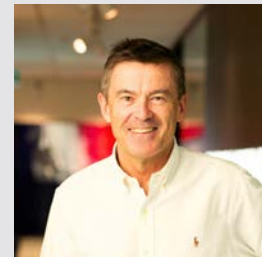
Lisa Kingman OAM
CEO

One of Australia's most respected community advisors, Lisa was awarded an Order of Australia in 2021 for her charity-business contribution and recognised as one of Australia's 100 Women of Influence in 2018. Lisa has been at the coal face of social change for decades. She is a member of Vic Govt Barwon Regional Partnership, a recipient of a Paul Newman Foundation Innovation Award and a founding member of charities EdConnect Australia and Housing All Australians. Lisa has served on boards including Chair, Courthouse Youth Arts and BHP Billiton Community Trust. Lisa holds a BA in Fine Art.



Anna McCann
COO

Anna joined the Tanarra Social Purpose team in 2022. Anna's early career as a lawyer led to her role as Head of Pro Bono and Community at Baker & McKenzie. Anna has a strong sense of social purpose with particular interest in helping the not for profit sector to be more efficient and effective. Anna served on the Board of Smiling Mind for four years and more recently, as Chief Operating Officer of The Reach Foundation. Anna is Special Advisor to the John and Myriam Wylie Foundation. She is an accomplished academic and holds a Law degree, a Science degree and an MBA.



John Wylie AC
Founder

John is Principal of alternative asset investment firm Tanarra Group. He was CEO of the Australian business of global financial services firm Lazard. He co-founded advisory and investment firm Carnegie Wylie & Company in 2000 which was acquired by Lazard in 2007. John served as Chair of Sport Australia, Chair of the Melbourne Cricket Ground Trust and President of the Library Board of Victoria. John supports a wide range of charities through The John and Myriam Wylie Foundation. He 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

Myriam is the Honorary Consul General of France in Melbourne, a position she has held since 2011. Myriam has a strong interest in education. She is a board director of Schools Plus Australia and Ambassador for EdConnect Australia. Myriam is the Founding President of the Bastille Day French Festival of Melbourne and a member of the Advisory Board of the French Australian Chamber of Commerce and Industry. With her husband, she established The John and Myriam Wylie Foundation. Myriam holds a degree in Business Law from the Panthéon-Sorbonne University in Paris and a MBA from Tulane University, New Orleans, and is an Officier de la Légion d'Honneur.



Roger Harley
Advisory Board

Roger is a founder and principal of independent corporate advisory firm, Fawcner Capital. He has over 30 years' experience as a corporate advisor across equity raisings, M&A, venture capital and corporate growth strategies. Roger worked for 11 years at Deutsche Bank, with responsibilities extending to Director of Corporate Finance and Equity Capital Markets. He has served as a Director of a range of companies including Medibank Private, as well as various Commonwealth Government entities including Innovation Australia. Roger has been a Senior Adviser at Tanarra Capital since 2015. He is also a Director of The John and Myriam Wylie Foundation.

WHY WE EXIST

Charities' goals are often bigger than their budgets or organisational capabilities.

Tanarra Social Purpose exists to help Australian charities realise their true potential to deliver significant social and economic outcomes in the most efficient and effective way.

It is that simple.

OUR POINT OF DIFFERENCE

- The commercial expertise we provide is usually only available to the retail and institutional asset investment sector,
- Our leadership team has some 50 years (combined) direct community sector expertise,
- We are not afraid to ask the tough questions or give frank advice, regardless of how emotive the charity is.
- Our smaller size is a plus, allowing a personalised and flexible approach compared to others in the pro bono space.

WHAT WE DO

We put our commercial skills to good use for community benefit.

We provide honest, practical, informed, independent strategic and financial advice, utilising the skills of the Tanarra investment team - one of the best in the world - as well as a network of highly qualified supporters, to help charities:

- clarify mission and strategy
- sharpen business plans
- access first class financial modelling tools for budgeting and business planning
- organise for cost-effective success
- get the right mix of skills and commitment around the board table
- develop an optimal and sustainable funding model
- develop a sound (but not suffocating) risk management culture.

effective

adjective

productive of, or successful in producing the intended or expected result. competent. capable.

efficient

adjective

achieving maximum productivity with minimum wasted effort or expense.

A SIMPLE IDEA



JOHN WYLIE AC
FOUNDER

This is an extract from John's speech at our 5th anniversary party at the State Library of Victoria.

Five years ago we had an idea.

Through my wife Myriam's and my foundation, we were meeting regularly with charities and social enterprises (SEs) across many fields which had outstanding missions, and were led by inspiring people aiming to make a positive difference to the world.

We realised that most of these organisations lacked access, due to financial constraints, to something which is readily on tap for private sector companies, namely independent advice and assistance.

Advice on the big picture as to how best to achieve their mission – their strategy, revenue model, cost effectiveness, governance effectiveness, opportunities for collaboration, or even mergers with others in a similar space.

It occurred to us that my investment firm Tanarra could have a natural role to play. Our team of smart young investment professionals could provide this advice, pro bono, and make a real difference. Solely focused on advising charities and SEs, not donors. It was a natural fit with our skill set, and with our firm's culture of innovation and thinking differently.

So we did.

We've seen the clear need for charities and SEs to have access to strategic advice, both at board and management level. Especially from an organisation not trying to sell them consultancy services for a fee.

We've seen how good advice can often have more impact - a more leveraged, strategic and durable impact - than a one-off cash donation.

And we've seen how these relationships offer benefits both ways. It's great for our team at Tanarra as well, who inhabit the privileged world of finance in their day jobs, who through TSP get to see and understand the vital and typically unsung work done by the NFP sector and its outstanding people in making our country a better, kinder, fairer, more equitable place. It's great for the soul of our organisation and the grounding it provides makes us better investors.

We say that we'll always give frank and fearless advice, that we aim to help, not necessarily to please. **Sometimes the most valuable advice is the stuff you don't want to hear!**

We want charities to want to improve the effectiveness of their overall sector, not just their own - to innovate and grow the pie for all, not just win market share from competing organisations in some zero sum contest from a community perspective.

We're really happy to be doing something positive like this and have no doubt that the role of charities keeps getting more important.

5 FOCUS CAUSES

WHERE WE PUT A MAJORITY OF OUR EFFORT



RURAL AND REGIONAL ADVANCEMENT

Distance and isolation often leads to disparity of opportunity and gaps in services. We look to boost the good work of grass roots community organisations responding effectively to local issues.



YOUTH

Young people are the future of Australia. We support organisations that work to ensure all young people are afforded the opportunities to develop and thrive - no matter what their background or circumstances.



PROTECTION OF OUR ENVIRONMENT

A healthy and biodiverse environment is the best legacy we can leave for future generations. We help boost the effectiveness of organisations that work to protect our fragile environment.



HOUSING FOR LOW INCOME AUSTRALIANS

Stable housing is a fundamental human right. Australia has a chronic shortage of affordable housing and we support organisations with innovative solutions to address this issue.



UNDER-EMPLOYED AUSTRALIANS

For many vulnerable groups, the opportunities to work are not forthcoming. We assist organisations that provide job opportunities for underserved Australians including people living with disability, refugees and ex-prisoners.

IMPACT DATA

6 YEARS: 2018-2023



364

CHARITIES & SOCIAL ENTERPRISES SUPPORTED



\$2,414,575

COMMERCIAL VALUE OF TIME DONATED



4,803

HOURS OF ADVICE GIVEN



188

FREE BOARD HEALTH CHECKS



87%

BENEFICIARIES OF OUR ADVICE IN 2023 HAVE A REVENUE UNDER \$2M



81%

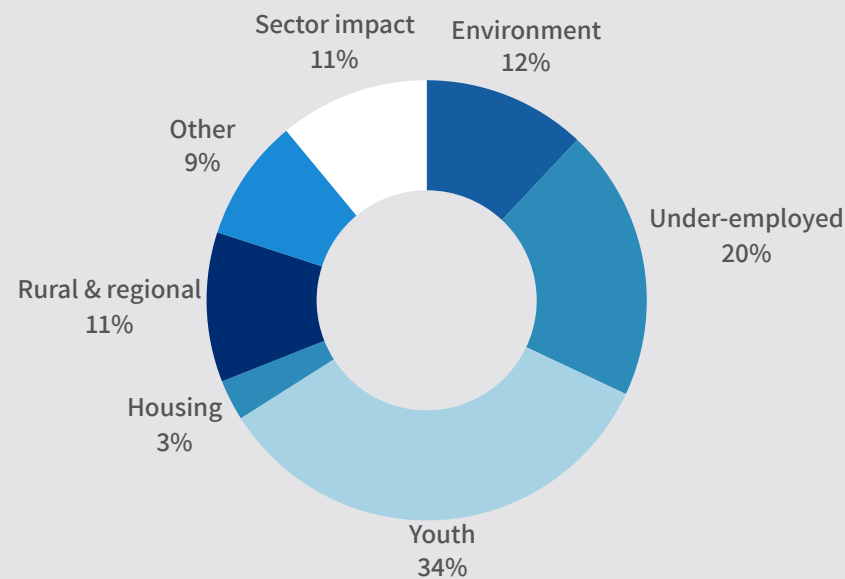
TANARRA GROUP STAFF DIRECTLY INVOLVED IN 2023



\$134,000

EXTERNAL PRO BONO GOODS AND SERVICES SECURED IN 2023

CAUSES WE DIRECTED OUR EFFORTS TO IN 2023



WHO WE HELPED IN 2023

10 x 10
Australian Suicide Prevention Fdn
Back Track Network
Beautiful Bunch
Bendigo FoodShare
Big Group Hug
Cool Australia
Daylight Foundation
EDFA
Farm My School
Farm Wall

FRRR
Geelong Food Relief Centre
Hotel Etico
Housing All Australians
Kilfinan Australia
Pathways to Resilience
Prison Network
Read the Play
Ready Set
Talk Out Loud

The Funding Network
The Good Box
The Social Lens
The Youth Impact Foundation
Two Good Foundation
Western Chances
WildLife Wonders
Youngster.Co

Charities and Social Enterprises listed are beneficiaries of our pro bono strategic or financial advisory services.

CELEBRATING 5 YEARS

In September we hosted a party for 150 guests at the State Library Victoria to celebrate five years since our inception. Talented young musicians from Princes Hill Secondary College set the scene with their outstanding jazz ensemble.

Tanarra Philanthropic Advisors officially changed its name to **Tanarra Social Purpose (TSP)**. This was driven by confusion in the market about what we did - with many thinking we are advisors on philanthropy, rather than providing advice at no charge. Our work and mission remains the same: to help charities and social enterprises shift from good to great by sharing our commercial skills at no charge.

To commemorate our fifth birthday we commissioned a short film by Hugo Rutten of the Social Lens. Hugo is creating employment for other neurodiverse people like himself, as Autistic people are six times more likely to be unemployed than non-disabled people. You can watch the video on our website homepage.

Within five years Tanarra Social Purpose has grown from a concept, to delivering almost 5000 pro-bono hours of strategic and financial advice to over 300 charities and social enterprises.

Beyond one-to-one charity change, TSP has created a free online Board Health Check to improve director performance. Our free downloadable resources include our Strategy Plan on Page, Board Charter, Company Secretary PD, and Top 10 Investment Committee considerations. We've hosted upskilling sessions, facilitated new connections with like-minded charities and foundations, and shared practical solutions to challenges faced by multiple charities.

Tanarra Social Purpose is a core part of the Tanarra Group value proposition and culture with over 80% of the team directly involved.

Today, we are proud to be recognised by our social change peers for asking the tough questions, being a safe sounding board, and providing practical and quality advice to charity leadership.



Photo courtesy of BackTrack

“

It has been an awesome and productive journey with the Tanarra team. This project has been extremely valuable for the Network and BackTrack, the workshop activity was a real stroke of genius! We are using the output as a useful live document.

”

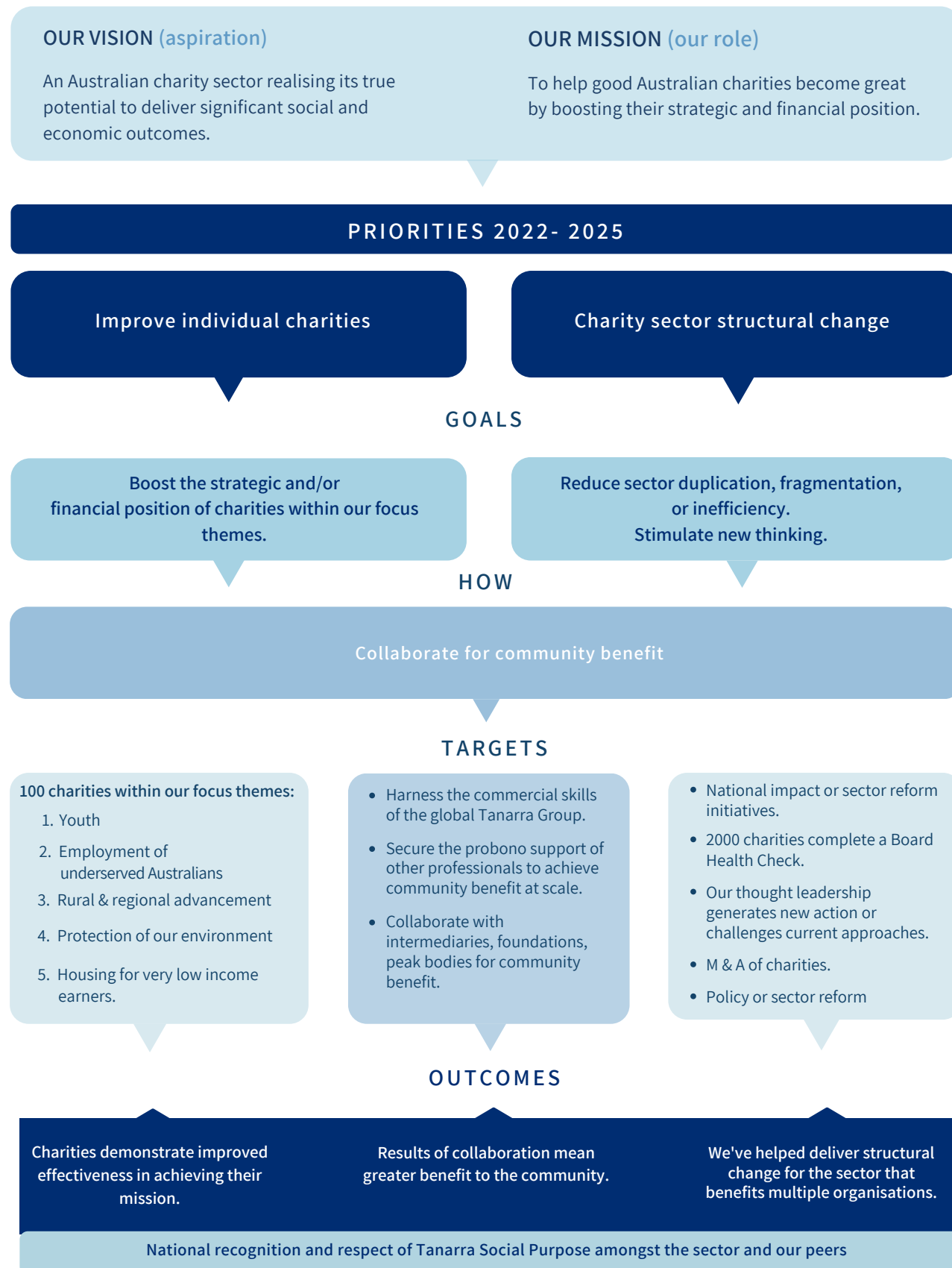


Marcus Watson, CEO, Backtrack Youth Works

OUR STRATEGY 2022-2025



PLAN ON A PAGE



WHERE ARE THEY NOW?

Then and now. We take a quick look at 5 organisations that Tanarra Social Purpose has advised.



MAGGIE BEER FOUNDATION

In 2017-18 we helped the Maggie Beer Foundation develop a new business model and strategy to maximise impact and to scale change in the food experience in Aged Care homes. In 2018 the foundation's revenue was \$315k.

IN 2023

The Australian Federal Government confirmed a \$5million commitment to enable the foundation to deliver free education and training to providers, cooks and chefs to improve the dining, food, and nutritional outcomes for Australian elders in Aged Care.

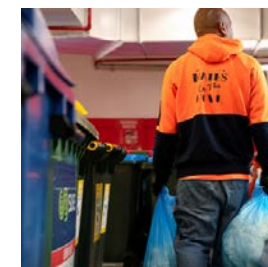


OURSCHOOL

In 2020 we helped Ourschool review its pricing and product offerings for its Alumni program in public schools. We developed a new financial model to strengthen its back end operations. In 2020 Ourschool's revenue was \$520k and it was supporting 18 schools.

IN 2023

Ouschool realised a revenue of \$715k. It also achieved special listing as a deductible gift recipient charity. In 2023 the charity supported 28 public schools and over 30,000 students. It is set to expand from VIC into QLD next year.



MATES ON THE MOVE

In 2022 we developed a new financial model with Mates on the Move, a program of Prisoners' Aid NSW, to help tackle the barriers to employment for people leaving prison. Within six months revenue increased by 40%.

IN 2023

For the first time in its 5 year history, Mates on the Move broke even. The program also secured a \$1million grant (over 3 years) from the Paul Ramsay Foundation to expand its services.



AUSTRALIAN RURAL LEADERSHIP FOUNDATION

In 2018 we provided advice on a 5 year strategy, existing funding model and harnessing the program's alumni. For the first time they employed a dedicated fundraiser. The ARLF revenue in 2018 was \$3.6million.

IN 2023

ARLF's 2023 revenue was \$13.87million - more than triple its 2018 income. 480 people from all corners of Australia graduated from one of its several leadership programs.



MOBILITY & ACCESSIBILITY FOR CHILDREN IN AUSTRALIA (MACA)

In 2021 we provided advice to this unique start-up charity including mission, value proposition and pricing for proposed services to inform scalability and sustainability.

IN 2023

2023 revenue was \$660k. New South Wales health professionals can access free, first-of-its-kind training course to improve road safety for children with disabilities and medical conditions.

WHAT DOES A GREAT CHARITY LOOK LIKE?

We've developed this self-analysis check list for charities based on five years working with the sector.

NEED, PURPOSE & STRATEGY

- ✓ Absolute clarity about the need you're addressing.
- ✓ A clear, simple and memorable purpose or mission that resonates.
- ✓ A Strategic Plan with everyone aligned: board, staff & volunteers.

WHAT YOU DO

- ✓ The program you deliver responds brilliantly to the need. The what correlates with the why.

LEADERSHIP

- ✓ You're led by an effective, respected, and admired leader that gets results. There's also a succession plan in place.

HANDS-ON BOARD

- ✓ Each board member rolls up their sleeves and actively uses their skills and networks to contribute (there's no passengers).

OPERATING ENVIRONMENT

- ✓ You have one eye firmly on your external environment - opportunities, competitors, strategic challenges, government, and funders.
- ✓ The other eye is on your internal operations - your people, risks, systems, finances, culture and programs.

TECHNOLOGY & DATA

- ✓ Technology is your friend. You invest in it for greater effectiveness and efficiencies.

COMMUNICATION

- ✓ Your stories and evidence of change and impact are continually captured and shared publicly.
- ✓ You actively seek feedback and listen to those you serve as well as funders.
- ✓ No radio silence. Consistently and authentically are the way you engage with donors. Not just EOFY.

MONEY & IMPACT

- ✓ The impact on those you serve justifies the cost of delivery and you can prove it.
- ✓ You are not reliant on one income source.
- ✓ You know and act on changing tack and loosen or tighten the money belt to achieve your mission.

NO EGO. NO SECRETS

- ✓ You're willing to join forces with others to achieve a common goal, rather than compete.
- ✓ We can easily access your strategy, annual report, outcomes, financials, and board details on your website.

GOOD, NOT STIFLING GOVERNANCE

- ✓ Good governance and compliance are part of your DNA but they don't block innovation.
- ✓ You're not afraid to say NO to programs or funders to retain a razor focus on what you do well.



PRIORITY 1

Improve individual charities

GOAL

Boost the strategic or financial position of charities within our focus themes.

OUTCOME

Charities demonstrate improved effectiveness in achieving their mission.

CASE STUDY UNDER-EMPLOYMENT



“ You challenged us to lead with rationality not emotion in considering the best approach to expansion. The process of creating a growth playbook was as valuable as the result. ”

Andrea Comastri
CEO, Hotel Etico



GOOD GROWTH

Meaningful employment prospects for people with disability are limited. The Hotel Etico team are keen to expand their successful business model to a broader geographic cohort.

The Tanarra team initially acted as a sounding board to help the Hotel Etico team refine its pitch to potential funders for a live event of The Funding Network. We recommended to not just focus on one particular growth prospect, but rather seek funds to help establish strong processes to inform any geographic expansion and build new internal capacity of the team. The money raised at the event allowed Hotel Etico to recruit a dedicated project manager who worked closely with Tanarra, including Friend of Tanarra, Derek Kidley. Together they developed a Growth Playbook. The playbook applies a series of objective filters to focus in on growth opportunities that minimise risk and maximise impact while ensuring sustainability.

Charity outcomes

- Hotel Etico raised \$102,000 at the TFN event to support its expansion plans,
- The Board now has a growth playbook to guide efficient and informed decision-making on potential new growth opportunities,
- The internal capacity of the Hotel Etico team was strengthened by working closely on the project with Tanarra.

Community outcomes*

- Since February 2021, 17 trainees have graduated from the Hotel Etico program with 100% securing open employment,
- 25 trainees have been paid a total of \$288,537 in award wages from Feb 2021 to Oct 2023,
- 100% of graduates have obtained RSA, barista and safe food handling qualifications setting them up for gainful employment in the hospitality industry.

*Community outcomes are not directly attributable to the work of Tanarra Social Purpose.

About the Charity

Hotel Etico enables people with disability to live a life of dignity and independence through work. It operates a hotel in the Blue Mountains NSW and offers training in hospitality and independent living, leading to sustainable employment after graduation.

The need identified

How can the Board of Hotel Etico objectively assess the best opportunity to help scale their social enterprise hotel model and welcome more people into their programs?

Probono hours 43

CASE STUDY RURAL & REGIONAL



“ Tanarra's impact can be seen through all levels of our charity from the committee to the warehouse. We couldn't afford this business advice normally. We're now working smarter and more efficiently and we're clear on our priorities because of the deeper self-reflection. It's been a fantastic process for us. We can now give more back to the community. ”

Andrew Schauble,
CEO, Geelong Food Relief

About the Charity

Geelong Food Relief is the heart of the region's emergency food system. It collects nutritious food that it shares with front-line charities to feed people in need.

The need identified

GFRC sought advice on Committee effectiveness, operational efficiencies and independent review of its stated purpose and differentiation with a view to revising its strategy and communication.

Probono hours 81



LONG-TERM SUSTAINABILITY

Geelong Food Relief Centre (GFRC) provides an essential service in regional Victoria. Over the past two years it has seen a significant surge in demand.

Tanarra's support commenced with a Board Health Check followed by an analysis and presentation of the findings including a review of existing strategic documents. Twenty recommendations were made to improve effectiveness and efficiencies which the board and CEO considered and prioritised. Recommendations included revising the governing committee's size and role, prioritising addressable business issues, improving the collection and reporting on community impact, and investing in appropriate technology to improve efficiencies. Tanarra facilitated a review of GFRC's purpose and differentiation to clarify its position in the food relief ecosystem and its value to the community. We also connected GFRC to one of our collaboration partners, Pressroom Philanthropy, to enhance the branding, communication and visual impact of its distribution centre and mini mart.

Charity outcomes

- A new fit for purpose committee of management from 14 to 6 skills based members,
- A refined vision, purpose, differentiation and value proposition,
- Currently upgrading technology and processes,
- New networks of probono support.

Community outcomes*

- Food to the equivalent of 1.8 million meals was distributed.
- 55 front-line agencies utilise the service and 80% are dependent on it.
- 90 ton of food per month collected.
- Regular volunteers grew from 65 to 140 (more than double)
- 122% increase in rescued and donated food and 74% reduction in purchased food.

*Community outcomes are not directly attributable to the work of Tanarra Social Purpose.

PROJECT SNAPSHOTS YOUTH



TALK OUT LOUD

Tanarra have been an absolute game-changer for our organisation! Their relaxed yet professional approach was a breath of fresh air. Talk Out Loud now have a crystal-clear purpose and a roadmap that guides our growth. Brett Knowles, Chair, Talk Out Loud

Talk out Loud (TOL) exists to support and build the emotional resilience of disengaged young people experiencing mental ill health. It provides a youth hub, camps, community events and school programs in a safe and inclusive environment.

After completing a Board Health Check and implementing some of the recommendations in the report, the Tanarra team worked with the CEO and Chair of TOL as the organisation undertook a refresh of its strategy, vision and mission. Talk Out Loud made use of Tanarra templates and benefitted from Tanarra’s expertise as a sounding board for optimising and strengthening its approach. The Tanarra team reviewed and assessed TOL’s existing financials assisting TOL to identify a pathway to financial sustainability.



READ THE PLAY

Tanarra gave us such a good leg up. From guiding our Theory of Change, getting our new strategy over the line to stay local and go deeper, navigating the right conversations with our stakeholders, and boosting the confidence of our CEO. We also ended the year with a small profit. Sarah Albon, Co Chair, Read The Play

Read the Play (RtP) is a Geelong based charity delivering innovative programs and workshops with sporting organisations and young people to help them take control of their mental health and wellbeing.

Our team asked the tough questions, considered competitors and potential collaborators, guided the development of RtP’s first Theory of Change, and provided advice on the business and financial model including budget and cash flow, with a view to ongoing sustainability. We workshopped with the Board to help galvanise a new strategic focus, make some hard decisions, and revise the organisational structure. We’re happy to report RtP is on track to deliver a bumper year of mental health impact across multiple sports and has a more effective and cost efficient strategy and improved money management leading to an optimal funding model.



PRIORITY 2
Charity sector change

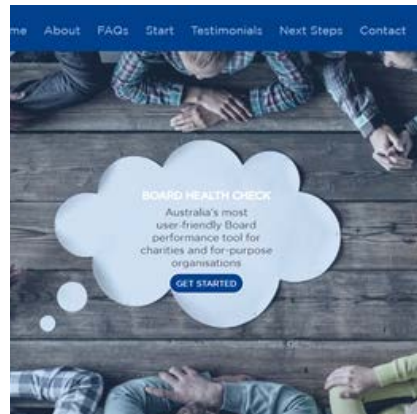
GOAL

Reduce sector duplication, fragmentation or inefficiency. Stimulate new thinking.

OUTCOME

We've helped deliver structural change for the sector that benefits multiple organisations.

HOW GOOD IS YOUR BOARD?



Every charity now has access to a free Tanarra Social Purpose Board Health Check.

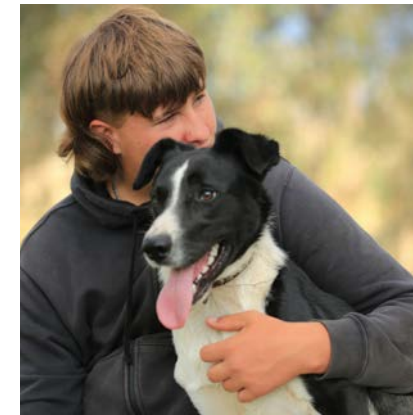
Effectiveness and efficiency of small to medium charity boards is one of the most common challenges. We know this from the hundreds of organisations we've worked with as well as feedback from the sector and intermediaries.

<https://www.boardhealthcheck.org/>

“
What a great service, thank you! This is our second year and the reporting is even better.
 ”

Jo Stephen
 The Wilderness Society

PROJECT SNAPSHOTS SECTOR IMPACT



BACKTRACK NETWORK

Managing Risk

BackTrack Youth Works' reputation as an effective leader in diversionary programs with disengaged and at-risk youth has led many other like-minded community organisations to seek guidance and mentorship. The BackTrack Network is a group of nine rural or regional organisations that have adopted and adapted BackTrack principles and methods to suit their own unique setting. Tanarra worked with all of the organisations involved in this innovative collaboration to help make the Network more efficient and effective. Focusing on the risk relationship and formal arrangement between the different organisations, Tanarra facilitated interviews and a workshop which led to a greater understanding of the strengths and challenges of the BackTrack Network for all its members.



THE YOUTH IMPACT FOUNDATION

Business model & governance

The Youth Impact Foundation (TYIF) is a new initiative with an ambitious agenda to connect, integrate, and enable youth charities (mental health, well-being, and leadership) to expand their reach and amplify the impact on young people. Tanarra supported the founding CEO by providing strategic advice. The first output was an independent view of the draft theory of change and business model, in which we challenged content, asked the tough questions a potential funder may ask, and helped TYIF achieve greater clarity. Secondly, we unpacked and provided advice on governance and operating model options e.g. integrated or decentralised. TYIF has confirmed its business model, tightened its proposition and made informed decisions about the benefits it offers to the sector and how it will integrate charities for greater youth impact.



KILFINAN

Financial analysis

Kilfinan Australia works to build capacity in the not-for-profit sector by providing a bespoke mentorship matching program for NFP leaders, matching them with volunteers from the corporate and government world. Kilfinan sought to better understand its costs of 'doing business' and sought assistance from Tanarra to ascertain the costs of its processes. To achieve Kilfinan's objectives, Tanarra, with the assistance of volunteer Analyst, Matt Churkovich, created a financial model based on historic operating and financial data which was then validated via an iterative process with management. The resulting model can be used by Kilfinan to build on its successful mentoring program and develop new, sustainable offerings.

TOP 3 WEAKNESSES OF CHARITY BOARDS

What do you think are the 3 most common weaknesses revealed from over 180 Board Health Checks of Australian charities and social enterprises in 2022 and 2023?

Weakness

Our recommended action

1

Our fundraising effort is not adequately balanced between board members and management (staff).

Results indicate greater clarity and/ or Board effort on fundraising and income generation is required. It is also likely that your Board needs to allocate more effort individually and collectively towards revenue generation.

2

We don't know who our main competitors are or discuss what we most admire about them.

Identify who your organisation's key competitors are (in actual delivery of services and in 'perception' when raising funds). Clearly identify points of difference. Adding an agenda item on the current activity of competitors may be useful. At the very least, it should be in an annual review. Considering your differentiation while actively seeking opportunities for collaboration may lead to greater impact.

3

At least once a year our board does not connect with our sponsors and supporters and seeks constructive feedback from them about our work and approach.

Consider appropriate mechanisms that you can implement to seek feedback and connect the board with donors and sponsors. These can be as simple as online surveys or community forums. Giving stakeholders a voice can help build confidence and trust in the organisation and also gives the board new insights into motivations and expectations.



HOW WE WORK

Collaborate to accelerate community benefit

Anna McCann, COO & Derek Kidley, Friend of Tanarra

GOAL

Harness pro bono support of likeminded others, in addition to our own investment of time and money.

OUTCOME

Results of collaboration mean greater benefit to the community.

COLLABORATION



Lisa Kingman, Michelle Gertz and Peter Le Huray, Friend of Tanarra

VOLUNTEER PROFESSIONALS

The Tanarra team can only do so much on its own. An ongoing demand from charities for quality independent pro bono expertise continues. To address this we reach out to our professional networks. The response has been nothing short of inspiring.

Thank you to Derek Kidley, Matt Churkovich, Nick Wormald, Peter Le Huray and Ben Weaton.



Ken Spence, Friend of Tanarra

INKIND SERVICES

Ken Spence (left) donates his photography talents to help Tanarra Social Purpose and other charities.

Vu Consulting, a boutique PR and communications team generously provides pro bono communication and media expertise to us to help amplify our work.

Phil Taylor and the team at Pressroom Philanthropy print this Impact Report for us at no charge and provide marketing and printing services to a number of charities we support.

Grattan Institute contributed time and expertise on one of our housing projects.

CHARITY SECTOR COLLABORATION

We encourage like-minded charities to collaborate in order to reduce duplication. We also try to walk the talk. The Funding Network provides referrals and an annual opportunity to one of its alumni charities, in the form of a Tanarra pro bono advice package. FRRR shares our free capacity building resources including our Board Health Check with hundreds of small grass roots organisations in regional and remote Australia.



What I found really rewarding and powerful was that, due to the clarity of the project parameters and the size of the organisation, it was clear to see the very strong and direct link between what we did and the impact on the organisation.



Derek Kidley
Friend of Tanarra



I've really enjoyed my time on the project and seeing first hand the difference this kind of help can make. The TSP team have a rich understanding of the issues faced by the sector and their insights are valuable.

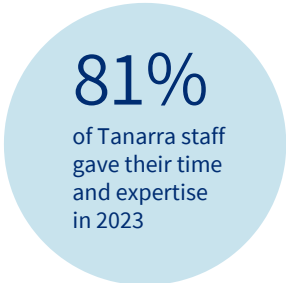


Nick Wormald
Friend of Tanarra

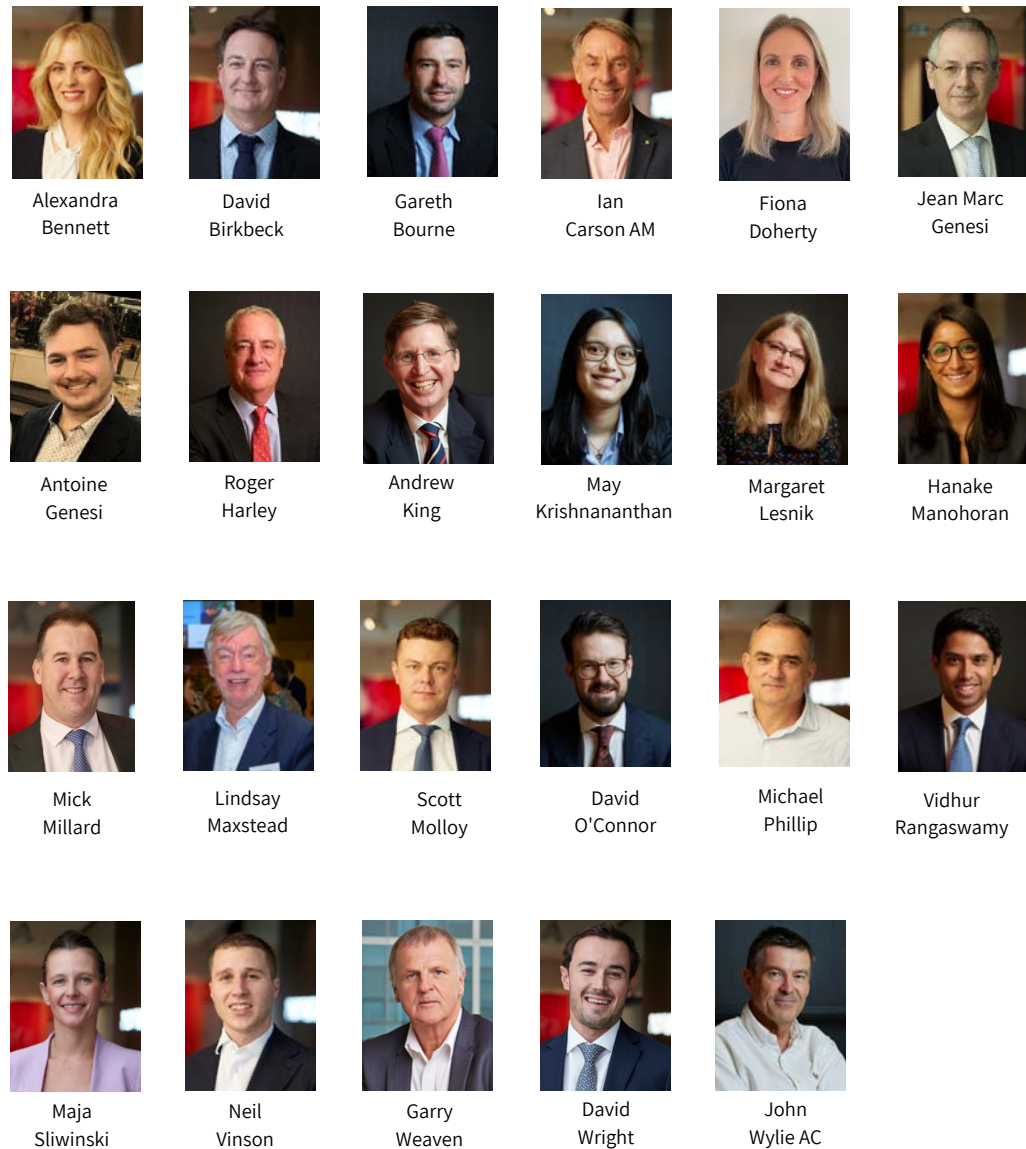
TANARRA GROUP INVOLVEMENT

Tanarra is a growing alternative asset investment firm that invests in a wide range of early stage ventures, private and public companies in Australia and around the world.

Tanarra Social Purpose harnesses the capability and experience of the global Tanarra Group in Australia and Hong Kong.



We're grateful to the following Tanarra team members who directly contributed to our 2023 charitable projects:



WHO IS TANARRA?



Tanarra is a growing, diversified alternative asset investment firm. Its founder and CEO is John Wylie, one of Australia's most well regarded investment bankers and investors. Tanarra invests in and partners with a wide range of early stage ventures, private and public companies in Australia and around the world.



Tanarra Social Purpose is a pro bono enterprise providing charities and social purpose organisations with independent high level commercial advice, that has historically only been readily available to the corporate sector. It harnesses the strategic and financial skills of the global Tanarra team and its networks to help organisations shift from good to great.



The John and Myriam Wylie Foundation is a private family foundation with a focus on education, social disadvantage, Indigenous self-determination and family interests e.g. French led initiatives. It operates independently to Tanarra's activities. Two of its major beneficiaries include the State Library Victoria with an \$8 million donation to establish the new Victoria Gallery, and \$5 million to the University of Melbourne to establish a professorship of Australian literature called the Boisbouvier Founding Chair.

“ Armed with Tanarra's insights, we made key recommendations that set us on the path to success. We crafted a powerful enhanced mission statement and identified key priorities for our future growth. As a first-time Chair, their guidance and support were invaluable to me. ”

Brett Knowles,
Talk Out Loud