



Collaborating for Social Impact  
Annual Report 2009

# Our Investors

CSI thanks the following supporters for their continuing investment in social impact in Australia.

CSI was established in 2008 with funding from the Commonwealth Government. The endowment of \$12.5 million has already been matched by funds pledged to CSI by our donors.

The following contributions have been made during 2008 and 2009.

## Corporate and individual investors

AMP	\$1,000,000
Petre Foundation	\$600,000
Gonski Foundation	\$500,000
Robin Crawford	\$500,000
Macquarie Group Foundation	\$400,000
National Australia Bank	\$400,000
Warwick Negus	\$400,000
PricewaterhouseCoopers	\$300,000

## In-kind contributions (business support & event hosting)

Bain & Company	\$230,000
University of Melbourne	\$132,500
Qantas Foundation, JBWere, NAB, PwC, AMP	\$42,000

## Melbourne Business School (for Chair at MBS)

Helen Macpherson Smith Trust	\$1,500,000
MBS funding	\$1,500,000

## Swinburne Centre for Philanthropy and Social Investment

Swinburne University funding	\$410,000
ANZ Trustees	\$150,000
Pratt Foundation	\$110,000
Myer Foundation	\$100,000
Yugilbar Foundation	\$70,000
Lord Mayor's Foundation	\$50,000
Trust Foundation	\$20,000
DVA/JBWere (in kind)	\$25,000

## University of New South Wales

UNSW funding	\$367,500
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**Total** **\$8,807,000**

**Thank you.** You are vital to our success.

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# From the Chair of the Board



It is with great pleasure that we welcome the University of Western Australia to CSI, to join our three founding partners. UWA's presence will strengthen CSI's focus and make us a genuinely national centre.

I would like to acknowledge the support shown by the Commonwealth Government through its endowment to the Centre, and also thank our philanthropic and corporate partners. We are proud of what we have achieved so far and could not have done it without their ongoing support. As we undertake more initiatives, broaden our reach and increase our impact it is important that we secure additional funding to make this possible.

I would also like to thank the CSI Board, our Advisory Councils and all of our CSI supporters for their advice and encouragement during 2009. Lastly congratulations to Professor Peter Shergold and his team for an outstandingly successful year.

A handwritten signature in black ink that reads "Fred Hilmer".

**Frederick Hilmer AO**  
**President and Vice-Chancellor**  
**The University of New South Wales**

# From the CEO



The Annual Report for 2009 is a record of significant achievement. It bears testimony to the wonderful team of committed individuals who turn ideas into action with extraordinary vigour.

As this Report reveals they walk the talk of social impact, many also volunteering their time to community activities. I feel very fortunate to have their support.

Tragically, Mark Lyons, on whose quiet wisdom I had come to depend, died during the year. His family has agreed to an annual oration in honour of Mark's contribution to the not-for-profit sector. The first will be in 2010.

On a more positive note I was delighted to welcome Les Hems as CSI's Director of Research. His experience at Guidestar UK and in establishing a centre for Voluntary Sector Policy on Research at University College London will serve us well.

Over the course of the year a number of CSI's strongest supporters have suggested that we need to re-examine our mission in order to articulate better the framework of our multifarious activities. These views were given force in our first stakeholder survey. As a result we now describe our purpose in terms of creating beneficial social impact through teaching, research, measurement and the promotion of public debate.

Our Annual Report shows that we have done much to meet these goals this year. There remains a long journey to travel.

A handwritten signature in black ink that reads "Peter Shergold".

**Peter Shergold AC**  
**Macquarie Group Foundation Professor**  
**the Centre for Social Impact**





## Our University Partners

The University of Western Australia became a partner of CSI during 2009. UWA joined the founding partners of the University of New South Wales (UNSW), the University of Melbourne and Swinburne University of Technology. CSI (WA) has now been established in the business school at UWA, providing a national focus for CSI activities and harnessing UWA's expertise in the areas of business ethics and sustainability.

CSI is a collaboration of the business schools of the universities: the Australian School of Business at UNSW, Melbourne Business School, Swinburne Faculty of Business and Enterprise and UWA Business School. The business schools are assisted by CSI's activities to deliver socially responsible management education, encouraging students to lift their gaze and widen their vision. CSI benefits from the distinctive perspectives and contributions of the four business school partners.

CSI is contributing to a joint chair in each business school. On their appointment, these professors will join CSI's executive team to help drive the collaboration and the expansion of CSI.

We thank the Vice-Chancellors, Deans, academics and administrators at all our partner universities for their continuing energy and commitment during the year.



Professor Tracey Horton and Michael Chaney - Chancellor of UWA, at the CSI (WA) launch event

“ We are delighted to be establishing the Centre for Social Impact here at UWA and look forward to creating the forum for meaningful engagement between the corporate, community and government sectors which will strengthen Western Australia's capacity to share the benefits of prosperity. ”

**Professor Tracey Horton, Dean, Business School, The University of Western Australia**

“ The initiative is an important contribution to building a strong civil society in Western Australia and developing the next generation of business and community leaders. The Centre for Social Impact has established itself as a powerful voice in teaching, research and public engagement in generating social innovation. Western Australia is in an enviable position to lead a social innovation agenda. ”

**Professor Alan Robson, Vice-Chancellor, The University of Western Australia**

# Who We Are

Our mission at CSI is to create beneficial social impact in Australia through teaching, research, measurement and the promotion of public debate.

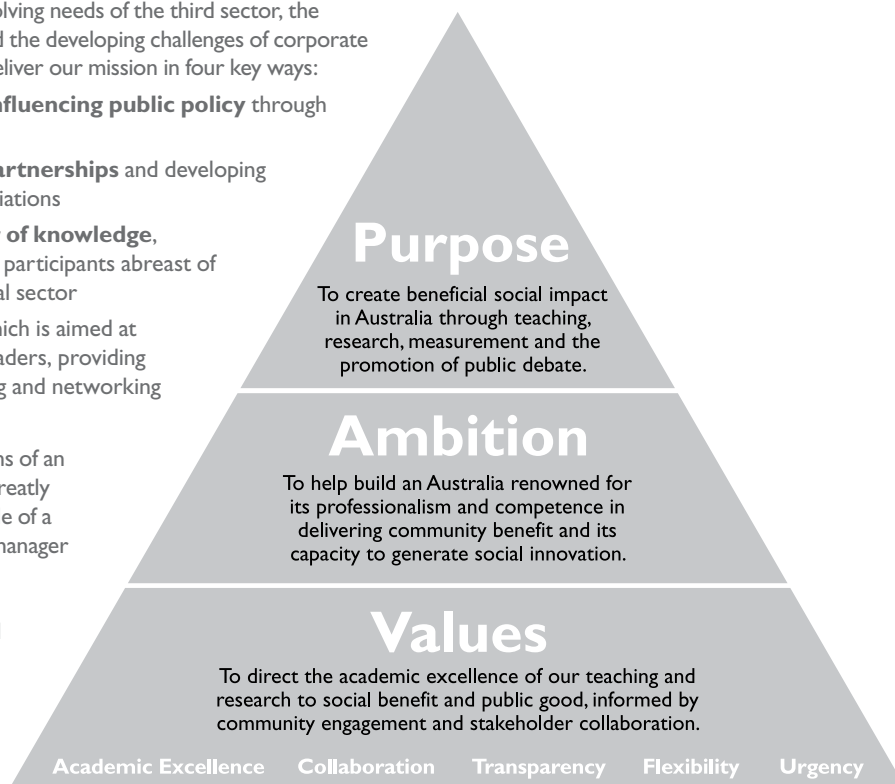
We bring together the business, government, philanthropic and third (not-for-profit) sectors, in a collaborative effort to build community capacity and generate social innovation.

At CSI we seek to respond to the rapidly evolving needs of the third sector, the emerging framework of social investment and the developing challenges of corporate responsibility and sustainability. We aim to deliver our mission in four key ways:

- by promoting **public debate and influencing public policy** through our action based research
- by **building collaborations and partnerships** and developing strong national and international affiliations
- through the **creation and transfer of knowledge**, promoting best practice and keeping participants abreast of trends and developments in the social sector
- through our **teaching program** which is aimed at supporting the next generation of leaders, providing professional development, mentoring and networking opportunities.

We recognise that the needs and expectations of an emerging leader in a social enterprise differ greatly from those of a volunteer in a governance role of a third sector organisation, or a sustainability manager in a large corporation. All have a pivotal role to play in creating an environment of social innovation and building an open, inclusive and sustainable society.

We are driven by our core values of partnership and transparency. We are committed to accountability. We will retain our organisational flexibility.



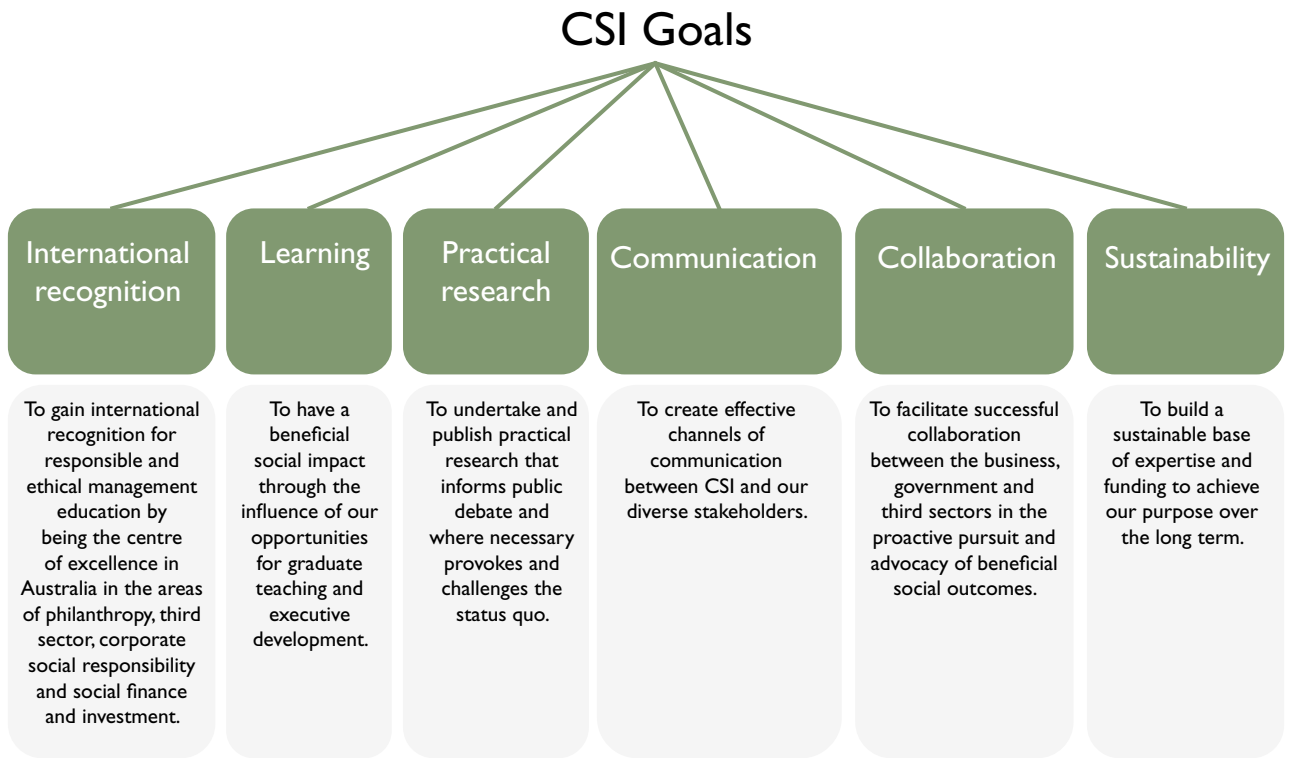
Building vibrant and successful communities requires a contribution from all levels of society. But bringing them together demands leadership, creativity and innovation. This is where the Centre for Social Impact is playing a critical role and we welcome its excellent contribution to linking our sector with business and government. Such a partnership will make it possible for us to engage in the highest levels of social innovation.

**Richard Spencer, Chief Executive Officer, The Benevolent Society**

This is a centre for social impact, not just a centre for the study of social impact.

**Professor Peter Shergold, the Centre for Social Impact**

# What We Do



See page 18 for how these goals are measured and our 2009 performance against each goal.



“ Anyone who is involved in or follows the not-for-profit sector would be aware of the substantial contribution of CSI to discussion and learning in and about the sector during 2009. The energy which Professor Peter Shergold and his team have given the Centre is remarkable. It is a matter of great pride for me as Chancellor of UNSW and Chair of CSI’s Sydney Advisory Council that so much has been achieved in so little time. It is however only a beginning and I have no doubt that the foundations now established will allow CSI to achieve all and more than what was envisaged when it was formed. ”

**David Gonski,**  
Chairman, Investec Bank (Australia) Limited,  
Chairman, Coca-Cola Amatil (Australia) Pty Ltd,  
Chancellor, UNSW

# How We Do It

CSI undertook a large number of initiatives in 2009. We ran 86 events and 18 executive courses, published 34 papers and conducted five research projects. We connected with thousands of people through our academic publications, media articles, opinion pieces and face-to-face at events. They and many others accessed our electronic newsletter and website. Below are just a few examples of the initiatives we have undertaken.

For a complete list of our events, publications and collaborations refer to our 2009 Annual Report appendix at [www.csi.edu.au](http://www.csi.edu.au)

## 1. Promoting Public Debate

### i) Increasing Public Understanding

#### Managing in a Downturn



The 'Managing in a Downturn' survey report was a collaboration between CSI, PricewaterhouseCoopers and the Fundraising Institute Australia. It examined the effects of the global financial crisis on third sector organisations.

The report examined Australian third sector organisations' perceptions of the impact of the economic downturn on their income and expenditure, as well as management actions which they proposed to take in response to the downturn.

The survey found that sixty per cent of these Australian organisations reported falling revenues in the first six months of 2009 and two-thirds were predicting a further loss of income during the next twelve months. It highlighted that declining sources of funding and rising costs were seen as the key challenges for the sector, while demand for their services increased. The survey received

extensive public commentary on radio and television and was covered in all major newspapers.

See [www.csi.edu.au/our-research-projects](http://www.csi.edu.au/our-research-projects) for full report.

#### LOOKING TOWARDS 2010

The survey for the second study of the series, 'Managing For Recovery', was undertaken in December 2009 and was published in February 2010. See [www.csi.edu.au/our-research-projects](http://www.csi.edu.au/our-research-projects) for full report.

CSI will continue with its partners to survey the economic state of the sector on a regular basis.



Les Hems

The locus for CSI's research is the intersection of the third, corporate and public sectors. Our action research seeks to support and inform CSI's other activities including promoting public debate and influencing public policy, building partnerships, transferring knowledge, and informing our teaching.

CSI's current research program is based on short term applied research projects designed to help third sector organisations, businesses and local government agencies measure and deepen their understanding of their social impact. It seeks to harness academic expertise to social purpose.

CSI's research strategy comprises the development, testing and refinement of methodologies for the measurement of social impact in four domains: the organisation, the service delivery system ("market"), the third sector and the community. The strategy is founded on collaborative relationships across CSI's university partners as well as CSI's partners in the corporate, public and third sectors.

Our long term goal is to create a robust knowledge and evidence base for the third sector and to make this available to third sector organisations and other stakeholders through a web-based "knowledge exchange".

“ PwC regards our partnership with CSI as a great opportunity to demonstrate that innovative collaboration between the sectors can create positive change in Australia. We are proud of our role in supporting this agenda, and look forward to further partnering initiatives with CSI. ”

**Rick Millen, Australian and Global Corporate Responsibility Partner, PricewaterhouseCoopers**

“ NAB is delighted to partner with CSI and more effectively connect corporate responsibility, community enterprises and social innovation. Through the NAB Social Research Innovation Program we hope to encourage both practical and research collaboration to enrich business and community life. ”

**Michael Ullmer, Deputy CEO, NAB**

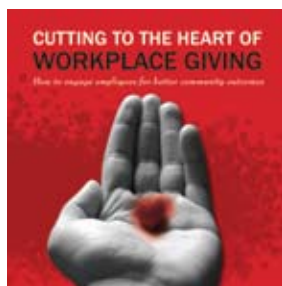
#### LOOKING TOWARDS 2010

In June 2010 CSI will be holding a research conference entitled 'Intersecting Transformations: Business and the Third Sector'. The conference will bring together a range of international speakers and Australian-based scholars to identify research priorities and research collaborations.



## ii) Undertaking Action Research

### Cutting to the Heart of Workplace Giving



This study looked at workplace giving from the employees' perspective, in order to understand employee motivations for participating in workplace giving. The survey found that for 75% of workplace giving donors, the donations made to organisations through workplace deductions are additional to their existing contributions: indeed for almost one in six donors, signing up to workplace giving has motivated them to increase their other donations. This evidence highlighted the enormous opportunities available through workplace giving as a fundraising stream and outlined key success factors for increasing participation in workplace giving.

The study led to the publication of an opinion piece on the measures governments could take to promote the development of workplace giving, which was also submitted to the Productivity Commission. This paper, written by Peter Shergold, was titled '*Providing Impetus to Workplace Giving*'.

One proposal put forward by CSI was that governments, as employers, should model best practice in workplace giving. This proposal was picked up in recommendation 7.4 in the Commission's report.

This project was a collaboration between CSI, The Australian Charities Fund, ANZ, Goldman Sachs JBWere, Mallesons Stephen Jaques, Bain & Company and Buyology Lab.

### LOOKING TOWARDS 2010

CSI, in partnership with The St James Ethics Centre, is investigating how corporate responsibility is being adopted by leading Australian companies. This research involves empirical analysis of trends reported by firms participating in the annual Corporate Responsibility Index Survey. The first phase of the research explores how participants integrate corporate responsibility and how companies measure the impact of their community investment programs. It also examines reporting practices.

👏 A lot has been accomplished by the CSI team in a short time. Significant strides have been taken in researching key areas of community engagement such as workplace giving, in teaching our current and future leaders, and providing critical input to policy formulation. 🙌

**Greg Hutchinson, Senior Advisor, Bain & Company**

## iii) Influencing Public Policy

### Productivity Commission Submissions

In addition to the report on workplace giving, three other submissions were made by CSI to the Productivity Commission report on the Contribution of the Not-for-Profit Sector:

- '*Building the Capacity of Community Organisations Through Better Regulation*' was developed by members of CSI's Sydney Advisory Council, working with Peter Shergold.
- '*Building a Social Finance System*' was written by Cheryl Kernot, Kylie Charlton and Gianni Zappalà and reflects the contributions of CSI to the financing of the third sector roundtable held by the Productivity Commission in November 2009.
- CSI Research Associate Andreas Ortmann encouraged the Productivity Commission to look to third sector certification models in Western Europe in the regulation of Australian third sector organisations.

To view the full report from the Productivity Commission on the Contribution of the Not-for-Profit Sector visit [www.pc.gov.au](http://www.pc.gov.au) and search for keyword 'not-for-profit'.

Cheryl Kernot enjoyed the opportunities offered her for engaging in public policy discussion from invitations to present to a number of Centrelink, FaHCSIA, and Public Sector Leaders' meetings. She focused on '*Socially Innovative Policy Responses to the Changing Social Landscape*'.

### Western Australian Economic Audit

Peter Shergold was a member of the Western Australian Economic Audit which published '*Putting the Public First: Partnering with the Community and Business to Deliver Outcomes*' in October. He oversaw the section on how the WA Government could work with nonprofit organisations in addressing citizens' needs.

### Briefing Papers for the Department of the Prime Minister and Cabinet

In response to an invitation, CSI prepared a series of papers for the Department of the Prime Minister and Cabinet, discussing social inclusion, addressing disadvantage in social investment, addressing disadvantage through volunteering, and approaches to measuring social impact. These papers were written by CSI academic staff and can be found at [www.csi.edu.au/publications](http://www.csi.edu.au/publications)

## 2. Building Links

### i) Becoming Part of a Global Network

#### Building Alliances

CSI seeks to build international links through world-class global alliances with universities, teachers, researchers and social entrepreneurs. We are part of a global research network of business schools committed to socially responsible business management.

We are affiliated with seven **international organisations**:

- Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) – *Member*
- Business for Social Responsibility (BSR) – *Associate Member*
- World Alliance for Citizen Participation (CIVICUS) – *Member*
- The European Academy of Business in Society (EABIS) – *Affiliate Member*
- The International Society for Third-Sector Research (ISTR) – *Member*
- The Nonprofit Academic Centers Council (NACC) – *Full Member*
- The UN Global Compact – *Signatories of the UN Global Compact and PRME*



CSI is also affiliated with seven **Australian organisations**:

- Associations Forum – *Member*
- The Australia and New Zealand Third Sector Research (ANZTSR) – *Member*
- Australian Davos Connection – *Associate Member*
- Givewell – *Member*
- National Roundtable for Nonprofit Organisations – *Member*
- Not-For-Profit Network – *Member*
- Philanthropy Australia – *Associate Member*



Michael Liffman is a member of the International Coordinating Committee of Worldwide Initiatives for Grantmaker Support (WINGS), the first Australian to serve on this prestigious organisation.

For more information on our affiliations refer to [www.csi.edu.au/our-affiliations](http://www.csi.edu.au/our-affiliations)

#### LOOKING TOWARDS 2010

Our new partnership with Business for Millennium Development (B4MD) has allowed us to bring Muhammad Yunus to Australia in March 2010 to conduct a series of events on the topic of social business. Yunus founded the Grameen Bank in Bangladesh and is a Nobel Peace Prize laureate. CSI will be bringing more international speakers to Australia in 2010.



Anne Measday

CSI conducts a large number of discussions and seminars. We do this to enable participants to debate current and emerging issues and to share views with visitors from Australia and overseas. Some are large public events. Many are offered to a small audience by invitation. Our extensive range of executive courses is designed to provide the opportunity for learning in the field of social impact. They are led by the best Australian presenters and a number of top international visitors. In 2009 our events and executive courses were offered in Brisbane, Canberra, Melbourne, Perth and Sydney.

### ii) Forming Partnerships

#### Qantas Foundation Social Impact Lecture

The Qantas Foundation lecture, 'Making a Business Case for Biodiversity' was presented by Mark Rose, Global CEO of Fauna and Flora International. The annual lecture is a joint initiative between the Qantas Foundation and CSI. Rose's lecture was designed to promote greater understanding of ways in which the third sector and business can work together to address the threats to our environment. He argued that a healthy planet is not just a human right, but is essential to our survival. Rose emphasised the economic value of the support services to the planet such as those provided by biodiversity and the ecosystem and the need to assign an economic cost and value to them.

### iii) Learning from Action

#### Professional Development Workshops



Senator the Hon Ursula Stephens addressing a CSI event

CSI partnered with the Centre for Corporate Affairs to conduct a professional development workshop run by Professor Jennifer Griffin from the George Washington University School of Business. The seminar focused on corporate responsibility in a global economy and examined international trends in stakeholder engagement. Griffin shared research she has been conducting with corporations internationally including important new research about best practice stakeholder relations. The interactive sessions involved participants from companies and third sector organisations.

In North Parramatta, CSI staff presented a workshop on emerging trends in the social economy. It was sponsored by Coleman and Greig Solicitors. There was robust debate about what the new regulatory landscape holds for the social sector in Australia and on how the relationship between governments, businesses and social enterprises will change in the future. Discussion also involved the manner in which the third sector can help to promote corporate social responsibility more effectively.

## 3. Transferring Knowledge

### i) Keeping Up to Date

#### Knowledge Connect



Knowledge Connect is a quarterly literature review of the latest thinking on social impact. Edited by Barbara Merz, it provides succinct summaries of publications of interest to social sector leaders and innovators. Garnered from a broad and eclectic range of international sources, Knowledge Connect's articles seek to keep

people up-to-date with global trends. In 2009, a series of luncheons was held with representatives from all sectors, to discuss the topics covered in each edition. These vigorous sessions were instrumental in fostering a deeper understanding of new issues and sharing knowledge of best practice. In particular, our Summer 2009 edition on 'Measuring Social Impact' provided the impetus for lively debate and discussion on the merits of different forms of measurement, and the challenges and opportunities they present. Goldman Sachs JBWere hosted these luncheon sessions. They have been very successful and will be continued in 2010.

To read Knowledge Connect editions visit [www.csi.edu.au/knowledge-connect](http://www.csi.edu.au/knowledge-connect)

#### LOOKING TOWARDS 2010

CSI is developing the architecture for a third sector Knowledge Exchange which will facilitate the development of a comprehensive information base for the sector. The initiative reflects a recommendation of the Productivity Commission in its report on the Contribution of the Not-for-Profit Sector. CSI is also an active participant in the Australian School of Business' knowledge sharing initiative with The Wharton School at the University of Pennsylvania.

### ii) Bringing International Perspectives to Australia

#### International Speakers

**Dr Speciosa Wandira** spoke at a jointly hosted session with CSI and AGSM Executive Programs. Wandira is on the Global Board of Directors for The Hunger Project and served as Uganda's Vice President from 1994 to 2003. She drew on her experiences with the Hunger Project and her political experience to discuss the difference leadership makes in driving innovation and entrepreneurship.

**Thomas Schillemans** spent five months with CSI as a visiting research fellow. He conducted comparative research on the relevance of media for public and third sector organisations that deliver public services. Schillemans is Assistant Professor in Public Administration at Utrecht University in the Netherlands.

CSI together with Vision Australia and the Australia and New Zealand School of Government (ANZSOG) hosted **David Blunkett** who spoke on 'Mutual Action, Common Purpose: Empowering the Third Sector'. Blunkett is a British Labour MP and was Education Secretary from 1997–2001. He has worked on anti-poverty, affordable credit and social mobility, and conducted a review of the future role of the community and voluntary sector.

To view videos of addresses by these speakers visit [www.csi.edu.au/videos](http://www.csi.edu.au/videos)



Dr Speciosa Wandira with sponsors

### iii) Sharing Experiences

#### Yakety Yak

Our 'Yakety Yak' dinner and conversation series was launched in 2009.

The evenings involve discussion around issues of public and social innovation, corporate responsibility, social entrepreneurship and the role played by third sector organisations in building a sustainable Australia. In these intimate events, broadcaster Peter Thompson interviews distinguished individuals who have shown exceptional leadership in their field. This is then followed by a facilitated discussion with the audience. The series was conducted in Brisbane, Sydney and Melbourne.

Our diverse range of speakers this year included:

- **Linda Burney**, NSW Minister for Community Services;
- **Kylie Charlton**, Managing Director of Unitus Capital & 2009 Heloise Waislitz Fellow, Asia Pacific Centre for Social Investment and Philanthropy at Swinburne University;
- **Dick Estens**, Chairman of the Aboriginal Employment Strategy;
- **David Gonski**, leading philanthropist, UNSW Chancellor and Chairman of Investec Bank (Australia) Limited;
- **Sue Gordon**, former WA Children's Court magistrate and former head of the Northern Territory Intervention;
- **Ken Henry**, Secretary to the Australian Treasury;
- **Eve Mahlab**, Convenor of the Women Donors' Network;
- **Arthur Sinodinos**, Regional General Manager of the Business and Private Bank at NAB and chief of staff to the former Prime Minister John Howard.



Arthur Sinodinos – NAB, Tamara Murray and Dick Estens – Aboriginal Employment Strategy

These events were hosted by our corporate partners: AMP, Macquarie Group Foundation, NAB and PricewaterhouseCoopers.

Due to its huge success, we will be continuing this series in 2010 in Sydney, Melbourne, Canberra and Perth, under Peter Thompson's continued direction.

To view our 2009 Yakety Yak videos visit [www.csi.edu.au/yakety-yak](http://www.csi.edu.au/yakety-yak)

### iv) Building Best Practice

#### The Transparency Awards

CSI joined PricewaterhouseCoopers and the Institute of Chartered Accountants to organise and sponsor the 2009 Transparency Awards, designed to recognise the quality and transparency of reporting in the third sector. The Transparency Awards give third sector organisations a valuable opportunity to prove that they take seriously the issue of accountability for financial and organisational management.

The 2009 winner was Oxfam, with World Vision the runner-up. They received \$20,000 and \$10,000 respectively for training and development. All award entrants also received scholarships to the CSI advanced executive course on financial management and reporting in the third sector, presented by Kevin Clarke.

Winning the Transparency Award was both a wonderful recognition of Oxfam's commitment to accountability and transparency, and also a great spur to even further improve our performance. Being transparent about our successes and our failings is an essential step to enhancing our accountability to our multiple stakeholders, especially the people we exist to serve.

**Andrew Hewett, Executive Director, Oxfam Australia**



Andrew Hewett, Senator the Hon Ursula Stephens and sponsors

Participation rates in the 2009 Awards grew by 22%, reinforcing the commitment of the sector to transparency in reporting. The practical benefits of the feedback received through participation in the award process was demonstrated by a 9% improvement in overall scores.

#### SROI Course

The measurement of social impact is an area of increasing importance and CSI is leading teaching initiatives in this field. We brought Jeremy Nicholls from the UK to teach a course based on the SROI framework for measuring and accounting for value, rather than money. The SROI framework places the emphasis on stakeholder involvement and on mapping social, economic or environmental outcomes. Kevin Robbie from SVA also taught an introductory SROI course.

We always found it difficult to value what we do with families and children for funding by potential corporate partners and the community. Now we have the tools to start the real value work.

**SROI Course Participant**



## The Common Cause Report

The 'Common Cause' study aimed to identify the key issues of social disadvantage in Greater Sydney. It sought to create a more inclusive community by making freely available an improved information framework to those interested in the current and emerging social challenges of the city. The report mapped the current needs of individuals, social groups and the community to allow better planning and resourcing of community initiatives and services on the basis of evidence.

This project was a collaborative effort between CSI, United Way Sydney, Perpetual and the NSW Community Relations Commission. It is the first stage in understanding the social issues faced by Sydney. A community consultation phase is now underway to determine what Sydneysiders think is the best way to tackle these complex issues.

Following the release of this report, CSI completed a research project with United Way to identify best practice principles in each of three focus areas: improving infant readiness to achieve in school, developing productive and engaged youth, and tackling youth mental health problems. The purpose of the research was to enable United Way to assess potential programs for funding and subsequent evaluation.

For the full report visit [www.csi.edu.au/our-research-projects](http://www.csi.edu.au/our-research-projects)



Our partnership with CSI has been critical in our transformation to becoming an organisation focused on Community Impact. A depth of sectoral understanding, academic rigour and flexibility have been hallmarks of their work as they have assisted us to understand priority community needs and best practice interventions. CSI play a unique and increasingly vital role in strengthening the not-for-profit sector's capacity.

**Doug Taylor, CEO, United Way Sydney**

### LOOKING TOWARDS 2010

Building on the success of the Common Cause report, CSI is undertaking research for Parramatta City Council (PCC) to identify the key social issues for the Parramatta Local Government Area. The research and report will provide the basis for awareness-raising and encouraging collaboration and collective action to bring about positive social change.

In partnership with PCC, we will also develop an Australian Social Enterprise Stories book to document narratives of Australian social enterprises through a series of interviews. The publication will assist with increasing awareness and understanding of social enterprise activity in Australia and aims to act as a catalyst for change. It is expected to be available in late 2010.

Social Enterprise has been part of Australia for almost as long as we have been a nation, however there is little known about it, little research on it, little training in it and experts in the field are few and far between. Renewed interest in the last two years in the potential of this field is very exciting. It gives CSI a great opportunity to help build skills into this fledgling sector that can help it succeed, to lead research into the sector so we know "what works" as opposed to what looks good and sounds good. CSI is perhaps uniquely placed to fill the knowledge gap in this sector.

**Toby Hall, CEO, Mission Australia**

## 4. Teaching for the Future

### i) Indigenous Community Engagement

#### Walama Muru Reconciliation Program



UNSW students at  
Nanima Reserve

CSI contributed to the UNSW Walama Muru program with the Aboriginal community of Nanima reserve in Wellington, NSW. The program brings together Indigenous and non-Indigenous people in a practical performance of Reconciliation, with UNSW students giving a week of their time in the Community. CSI's involvement enabled the projects this year to be carried out on a larger scale, including the construction of playground equipment, a fenced barbecue area, a shelter and new fencing. Our thanks to the Nanima Community, the volunteers, Nura Gili and the UNSW Student Organisation ARC for including us on this journey together.

Thanks to the CSI donation we could buy more new equipment for the playground and the kids were trying to climb all over it even before we finished.

**Michael Cox, Student Volunteer Coordinator**





**Cheryl Kernot**

2009 has been an exciting year of teaching for CSI. The Graduate Certificate in Social Impact which will commence in 2010 has been piloted with MBA students from AGSM and we are confident it will provide a valuable learning and networking opportunity for individuals working within, or with, the sector. This program has been developed in conjunction with all four CSI partner universities and we look forward to its commencement in 2010.

In our endeavours to foster the next generation of leaders, CSI has also supported The Emerging Leaders for Social Change group, and assisted with their Collaboratory forums. Find out more about the Emerging Leaders group at [www.elsc.com.au](http://www.elsc.com.au)

CSI has also been focused on a number of social enterprise initiatives in 2009. We have kick-started a social procurement research initiative. The Social Entrepreneurs' Salons have been an opportunity for me to support individuals working on social purpose business projects, where they can apply the learning to their own projects in a supportive environment of like-minded peers.

## ii) Supporting the Next Generation

### PRIA Scholarship

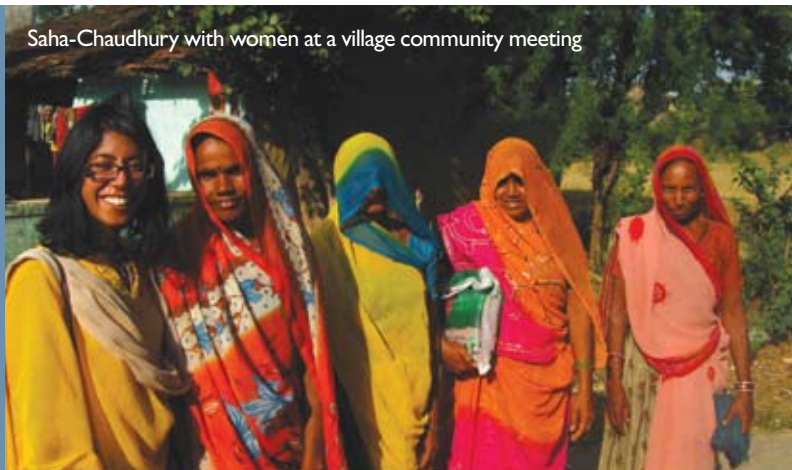
Following the success of the 2008 PRIA Scholarship, CSI and the Chain Reaction Foundation again provided financial support for a participant to attend the International Internship Program of PRIA, the Society for Participatory Research in Asia. Our 2009 winner was Keya Saha-Chaudhury, an Arts/Law honours graduate from ANU. The Internship was held over eight weeks and comprised time spent at the PRIA head office in Delhi and two field placements.

For Saha-Chaudhury's full story visit [www.csi.edu.au/latest-csi-news/pria-scholarship-winner-s-story](http://www.csi.edu.au/latest-csi-news/pria-scholarship-winner-s-story)

“ The internship taught me a lot about rural life and local self governance structures in India but it was the stories from the communities that taught me the most. Both the organisations I worked with were focused on empowering communities to take responsibility for their own development, by building their capacity to participate in public processes and assert their rights. ”

**Keya Saha-Chaudhury, 2009 PRIA Scholarship winner**

Saha-Chaudhury with women at a village community meeting



### LOOKING TOWARDS 2010

CSI will be running a competition for a prize in the area of social business and social innovation.

## iii) Building Student Support

### Net Impact Conference

In October, CSI sponsored the Net Impact Conference in Melbourne, organised by the Net Impact Clubs of Melbourne Business School and the AGSM at UNSW.

'Leading Business Innovation for Social Change' was the theme for the event, which included a series of keynotes and panels discussing the latest trends in carbon emissions trading, green technology, social capital markets and social enterprise as tools for social change. The Co-Founder and Chairman of Net Impact, Professor Jim Schorr from Vanderbilt University, was a keynote speaker.

## iv) Teaching Socially Responsible Business Management

### Graduate Certificate



The Graduate Certificate in Social Impact focuses on building the professional capacity of social managers and entrepreneurs of the future, across the corporate, government and third sectors. This enhances their capacity to lead organisations creating social and environmental value and their ability to operate in a changed cross-sector social landscape.

The Graduate Certificate program teaches students how to weigh the effects of their actions on society and develop critical thinking on leadership. They will be equipped to re-imagine markets which generate additional social and environmental benefits. Students will gain a well-rounded understanding of the issues surrounding the creation of measurement of social impact, develop an appreciation of the important role that each sector has to play in the delivery of community benefit, and an understanding of the social innovation that can occur at the intersection of the sectors.

For further details on the Graduate Certificate visit [www.csi.edu.au/graduate-certificate](http://www.csi.edu.au/graduate-certificate)

### LOOKING TOWARDS 2010

The Graduate Certificate in Social Impact will be offered through CSI's three founding partner business schools: the Australian School of Business at UNSW, Melbourne Business School and Swinburne University of Technology's Faculty of Business and Enterprise. UWA will be offering the program in 2011. It is likely that many MBA, MBT or MCom students will undertake individual certificate courses as electives.

“ We are living in an exciting new world which is changing around us. We need to understand how to operate in it. ”  
**Cheryl Kernot, Director of Social Enterprise, and Program Director**

## v) Providing Greater Access to Learning

### Scholarships

CSI has been overwhelmed by the generosity of those who want to give financial aid to students to undertake the Graduate Certificate. Already a total of 50 scholarships over the next five years have been secured from CSI partners. The scholarships offer part payment of fees. AMP, Chief Executive Women, Clayton Utz, Mrs Louise Gourlay, Macquarie Group Foundation, MBS Alumni Fund, NAB, PricewaterhouseCoopers and Shark Island Foundation have provided scholarships in 2009. The focus for selection will be on those who work for third sector organisations or social enterprises or serve the community as volunteers.

In addition, AMP provided 49 scholarships for the CSI executive courses.

For further information on scholarships please visit [www.csi.edu.au/scholarships](http://www.csi.edu.au/scholarships)

“ Chief Executive Women is delighted to partner with the Centre for Social Impact to offer scholarships to four women, already proven leaders, to develop their skills in social enterprise through the Graduate Certificate in Social Impact, which we see as a new and innovative approach to developing capability in this critical community sector. ”

**Kathryn Fagg, Chair, Scholarship Committee, Chief Executive Women**

“ The Macquarie Group Foundation is very proud to be supporting the Centre for Social Impact. The Centre is key in developing business leaders to ensure that they have a strong understanding of the importance of the not-for-profit sector. ”

**Julie White, Head, Macquarie Group Foundation**



# Walking the Talk

From CSI's perspective, values are important. It is a matter of pride that most of our staff have experience in working within the third sector. This year for example:

**Sarah Adams** has been involved with several local Sydney charities, including Oxfam UNSW, the NSW Oxfam State Committee and OzHarvest. She has undertaken several internships in Australia and overseas. Sarah is also a current member of the Emerging Leaders for Social Change.

**Jan Cochrane-Harry** chairs the Margaret Lawrence Bequest and is a director of the Melbourne Lord Mayor's Charitable Foundation.

**Elena Douglas** is a pro bono consultant to the "Alliance for Children at Risk".

**Debbie Haski-Leventhal** serves on the Research Advisory Group for Volunteering Australia. She was a researcher for the Israeli Centre for Third Sector Research in Israel (ICTR).

**Les Hems** was Chairman of Coventry Sports Trust from November 2006 to January 2010. Les took over the chairmanship when the Trust was facing insolvency, and working closely with fellow board members and senior managers over a three year period, navigated the Trust to stability and then to a secure long term future with a seven year funding agreement with Coventry City Council.

**Mei-Ling Ho** is a member of Clean Energy for Eternity which promotes and enables change towards environmental sustainability at a grassroots level. She is on the project team assessing the viability of Australia's first community solar farm. The Department of Environment, Water, Heritage and the Arts have provided \$100,000 for a feasibility study to be undertaken. This initiative is an urban/rural partnership between Bega and Mosman communities.

**Cheryl Kernet** is chair of the Fair Trade Association Australia and New Zealand and serves on the board of Foresters Community Finance which is pioneering social investment in social enterprises. She is also on the founding committee of a UK charity providing shelter and education for street children in Kampala, Uganda. In addition, Cheryl is a member of the panel judging the 'Most Socially Responsible Bank' awards and of the international panel judging the Oikos Case Study (Social Entrepreneurship) awards. She is working to foster the writing of Australian case studies for inclusion in this prestigious competition.

**Michael Liffman** is on the council of the Victorian Department of Education's School for Student Leadership, a board member of Southport Community Residential Home, and a director of two social-purpose companies, Community Capital and Benefic.

**Lisa Lusthaus** provides her time pro bono to work for CSI. We thank her for her substantial contribution.

**Anne Measday** mentors a number of young people in matters such as career goals and progression, work-life balance and support with significant life and career events. She does this through informal networks and thoroughly enjoys the two-way interaction and learning that mentoring involves.

**Barbara Merz** is co-founder of Emerging Leaders for Social Change. This group was established in August 2009 as a network of representatives from all sectors – the third, government, and business – who want to create positive social change in Australia. The goal is to support emerging leaders to be part of transforming Australia's social sector.

**Nikita Nagesh** co-founded the student society Education Without Borders (UNSW), based on the belief that giving children access to education is one of the most powerful ways to assist them in escaping from the cycle of poverty. The society was awarded Best New Club of the Year by UNSW in 2009, and hopes to build a bilingual children's library in Asia by partnering with Room to Read.

**Andreas Ortmann** provides pro bono support and advice to the International Committee on Fundraising Organizations.

**Peter Shergold** is extremely active in third sector organisations. He is Chairperson of the Australian Rural Leadership Foundation, serves on the board of the Sir John Monash Foundation and the National Centre for Indigenous Excellence and is the Chair of the Ethics Committee of the Fundraising Institute Australia.

**Gianni Zappalà** is a board member of the Connect Australia Foundation, which aims to increase the level of success for refugees and migrants on arrival, settlement and longer term community integration.



Photo courtesy of Mission Australia. Learning begins long before school starts at Mission Australia

# CSI Survey of Stakeholders

CSI conducted our first annual survey of stakeholders in December 2009. We were very pleased to receive 562 responses. This was a short, confidential, online survey sent out to CSI contacts and posted on the homepage of our website. We warmly thank everyone who took the time to participate. The information provided is of enormous value and we will continue to use it to underpin our strategy and develop initiatives.

This survey was developed with the support of Bain & Company and asked people to rate how likely they are to recommend CSI to colleagues or friends. It used the Net Promoter Score® tool\*.

The following results are only a snapshot of what we have learned. We are continuing to analyse findings and follow up with selected respondents.

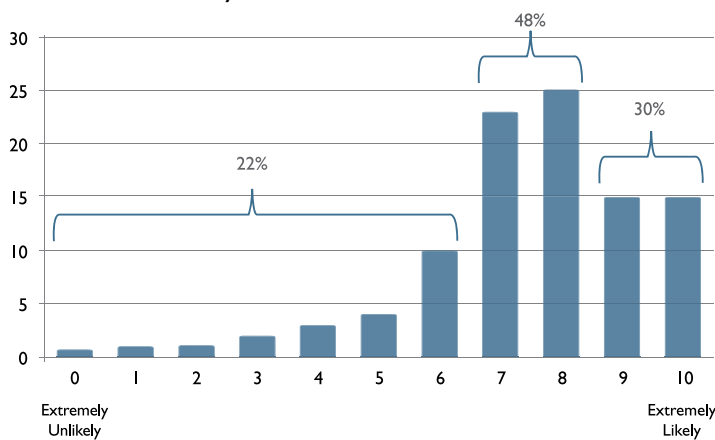
\*For more information on the Net Promoter Score visit [www.netpromoter.com](http://www.netpromoter.com)

## Here's what you told us:

Overall, feedback for our first 18 months has been overwhelmingly positive. Almost one-third of people who have worked with CSI are promoters of what we are doing, saying they would be highly likely to recommend CSI to a colleague or friend.

### Likelihood of recommending CSI to a colleague or friend

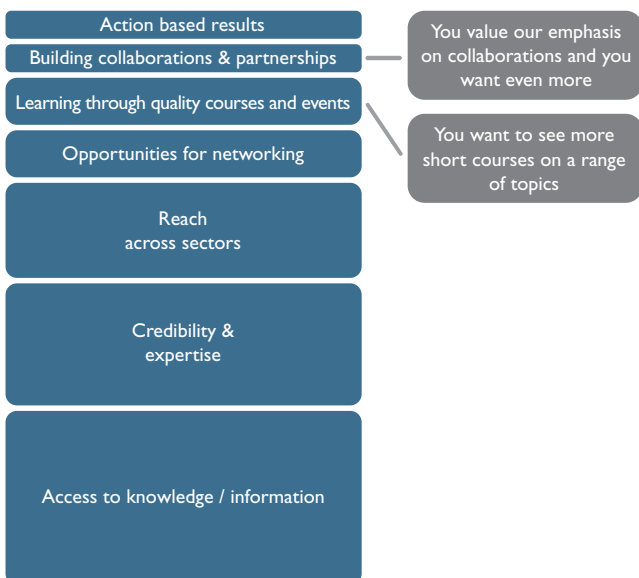
% CSI Annual Survey 2009



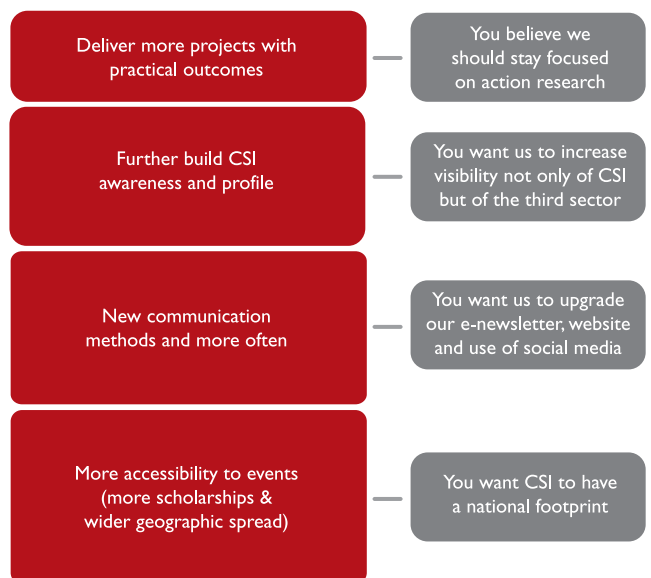
### Here's what some of our respondents said:

- "CSI provides a highly professional knowledge base."
- "CSI is committed to participation and collaboration."
- "A good way to network and meet other people in my field."
- "CSI is central in enabling effective cross-sectoral processes from both an academic and delivery stance."
- "The CSI website is an excellent resource for staying informed on social issues and keeping up to date with latest thinking, developments and events."

## What we are doing well



## What we could do better



## LOOKING TOWARDS 2010

CSI will be conducting phone conversations and focus groups with a number of respondents who have agreed to provide further input. This will allow us to delve deeper into these insights. Learnings will be used to shape our strategy and programs going forward. If you would be willing to be part of these conversations please contact Mei-Ling Ho at [meiling.ho@unsw.edu.au](mailto:meiling.ho@unsw.edu.au)

More detailed survey results will be available on our website at [www.csi.edu.au](http://www.csi.edu.au) later in 2010.



# Performance against Key Measures

The following section highlights our performance against key measures for each of our six goals. CSI commenced operations in February 2008 and substantial business activities commenced in the second half of the year. In order to improve transparency we have compared operations not only for the full year but also for the second half of each year.

## Goal 1: International Recognition

**Goal – To gain international recognition for responsible and ethical management education by being the centre of excellence in the areas of philanthropy, third sector, corporate social responsibility and social finance and investment**

### Measure 1.1 – Rankings against business schools in terms of commitment to socially responsible management and education

The Graduate Certificate was in development in 2009 and the official commencement date is February 2010. No ranking is possible for 2009.

### Measure 1.2 – Relationship with institutions and groups

CSI is affiliated with seven international organisations (see list on page 10).

We hosted visits by thirteen international academics and other experts in third sector issues. The visitors were:

- **David Blunkett**, British Labour MP and Education Secretary from 1997–2001
- **John Casey**, Associate Professor, Baruch College, City University of New York
- **Jennifer Griffin**, Associate Professor of Strategic Management and Public Policy at The George Washington University School of Business
- **Pamela Hartigan**, Director of the Skoll Centre for Social Entrepreneurship in the Saïd Business School, University of Oxford
- **Les Hems**, School of Public Policy, University College London, and Guidestar UK
- **Peter Hero**, Senior Fellow at The Center for Social Innovation at Stanford Graduate Business School
- **Jon Huggett**, advisor and ex-partner at the Bridgespan Group and at Bain & Company
- **Richard Locke**, Professor of Entrepreneurship at Massachusetts Institute of Technology
- **Jeremy Nicholls**, Chief Executive of the SROI Network
- **Mark Rose**, Global CEO, Fauna and Flora International
- **Thomas Schillemans**, Assistant Professor in Public Administration at Utrecht University
- **Rajesh Tandon**, President of the Participatory Research Institute of Asia (PRIA)
- **Speciosa Wandira**, Director for the Hunger Project and Uganda's Vice President from 1994–2003.

## Goal 2: Learning

**Goal – To have a beneficial social impact through the influence of our opportunities for graduate teaching and executive development**

### Measure 2.1 – People attending academic and executive courses

#### Events

CSI held 86 events in 2009. These events provided opportunities for in-depth discussion of new ideas, facilitated collaborative approaches and helped build networks of social capital.

The number of events held in July – December 2009 increased by more than two and a half times the same period in 2008.

Over the course of the year, 2175 people attended our events. For the July – December 2009 period, the number of participants was almost double that of 2008.

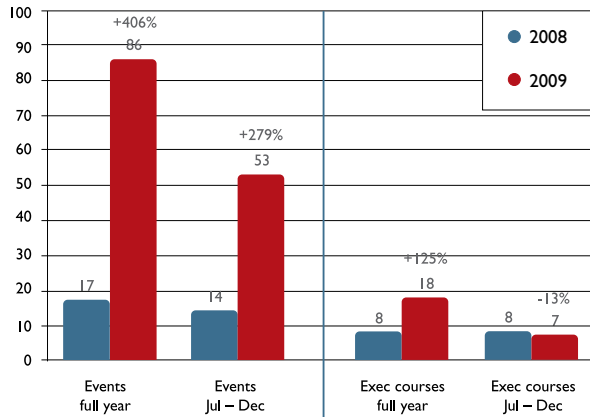


## Executive courses

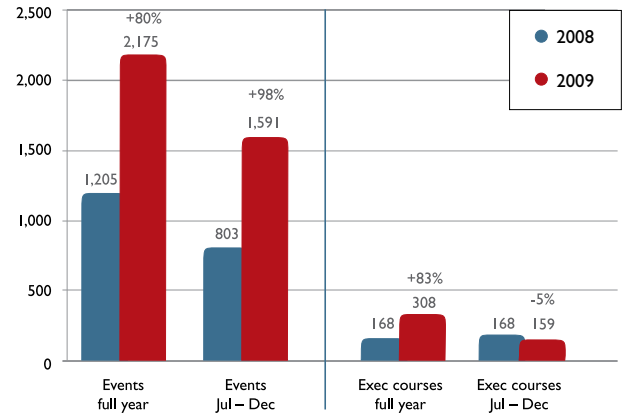
18 executive courses were held in 2009, more than double the number held in 2008. For the July – December 2009 period, the number of executive courses was down 13% on the same period in 2008, with an emphasis on delivering a larger number in the first half of the year. Courses were held in Sydney and Melbourne.

308 people attended our executive courses in 2009.

**Number of events & executive courses  
2009 vs 2008**



**Participant numbers at events & executive courses  
2009 vs 2008**



## Measure 2.2 – Participant Assessment of Executive Courses

Feedback on quality is important.

Each executive course was evaluated by participants, with data being used to inform improvements in future courses and offerings. Ratings were measured on a five point Likert scale, where a score of 4.0 and above is considered highly satisfactory.

- Participants' average response to the question **“How would you rate the program overall?”** was 4.2. This is slightly above the 2008 average response rating of 4.1. Results from individual courses ranged from 3.4 to 4.7.
- Participants' average response to the question **“How would you rate the presenters?”** was 4.3. This is in line with 2008 average response rating. Results from individual courses ranged from 3.7 to 4.8.

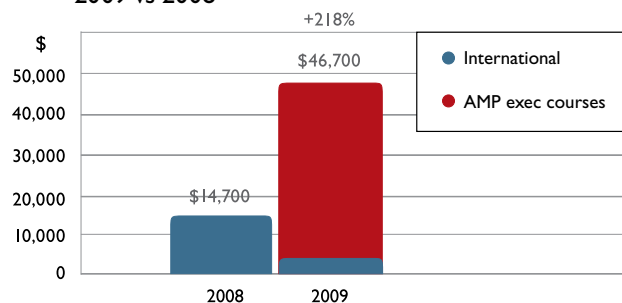
## Scholarships

The following scholarships were awarded in 2009:

- One PRIA scholarship to India
- 49 AMP scholarships for executive education courses

The value of CSI's scholarships increased by more than double compared to 2008.

**Scholarships  
2009 vs 2008**



## Postgraduate courses

14 students participated in the *‘Social Impact: Entrepreneurs and Social Innovation’* pilot course in 2009. The Graduate Certificate in Social Impact commenced in 2010 and will be fully reported in the 2010 annual report.

## Goal 3: Practical research

Goal – To undertake and publish practical research that informs public debate and where necessary provokes and challenges the status quo

### Measure 3.1 – Research projects under way and case studies developed

We published five reports in 2009:

- The Giving Business (February 2009)
- Common Cause (July 2009)
- Managing in a Downturn (July 2009)
- Social Enterprise World Forum Research Roundtable (October 2009)
- Cutting to the Heart of Workplace Giving (November 2009)

Visit [www.csi.edu.au/our-research-projects](http://www.csi.edu.au/our-research-projects) for full reports.

#### Academic publications:

**Debbie Haski-Leventhal**, NAB Research Fellow, continued to build her prolific academic record in 2009. She had many articles published including on enhancing volunteering in the *Journal of Social Policy*, altruism and volunteerism in the *Journal for the Theory of Social Behaviour* and a comparative study of service learning in the *Journal of Nonprofit & Public Sector Marketing*.

**Cheryl Kernot** and **Peter Shergold** were published in the Winter 2009 *Griffith Review*.

The total number of academic papers published in 2009 was 13.

For the full list of CSI academic papers refer to our 2009 Annual Report appendix at [www.csi.edu.au](http://www.csi.edu.au)

### Measure 3.2 – Ability to attract research funding

During 2009 CSI received \$259,500 in funds to conduct research projects and prepare papers.

## Goal 4: Communication

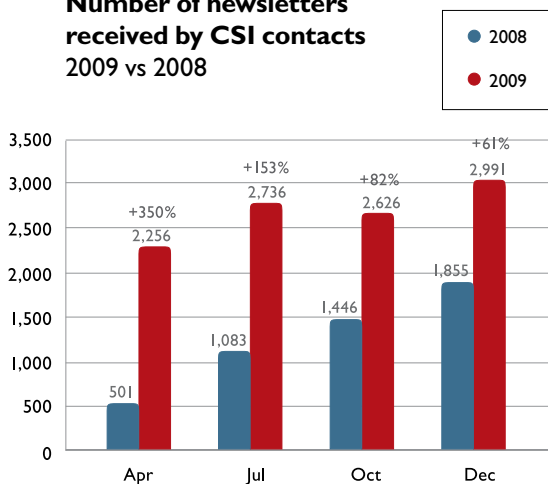
Goal – To create effective channels of communication between CSI and our diverse stakeholders

### Measure 4.1 – Newsletter distribution, website access, periodic publications and responses

#### Newsletter

CSI's monthly electronic newsletter was sent out to almost 3,000 subscribers. The newsletter provides news and developments about CSI's latest initiatives. It also contains information on social impact issues of interest to our partners, collaborators and readers.

**Number of newsletters received by CSI contacts 2009 vs 2008**



#### Number of newsletters received by contacts

In 2009, the number of newsletters received by CSI contacts averaged 2,160 per mail out, compared to an average of 1,116 per mail out in 2008.

#### Number of newsletters opened

Of newsletters received in 2009, approximately 31% were opened per month. Very few readers unsubscribed. Many readers then used the links to access further information from the CSI website.

Note: The CSI newsletter was published 6 times in 2008 and monthly in 2009

## Website

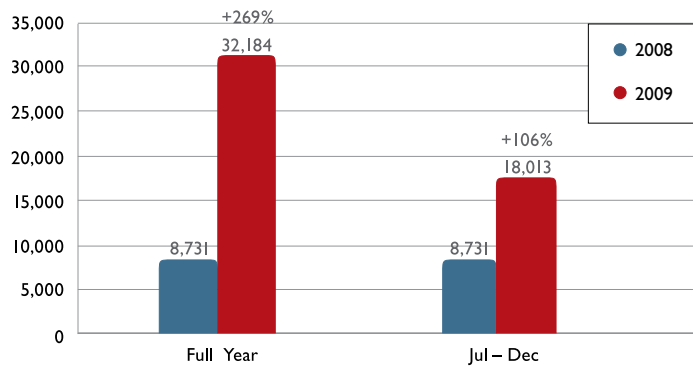
The CSI website aims to provide users with access to resources and latest news, and to keep people informed of initiatives undertaken by CSI. One of the upgrades to the website in December 2009 was a new home page announcing the latest developments.

In 2009, the website received over 32,000 visits in total (including multiple visits by an individual). For the July – December 2009 period this was more than double the number of 2008 visits over the same time frame.

The total number of new visitors to the CSI website in 2009 was 12,509. For the July – December 2009 period this was more than double the 2008 figures for the same time frame.

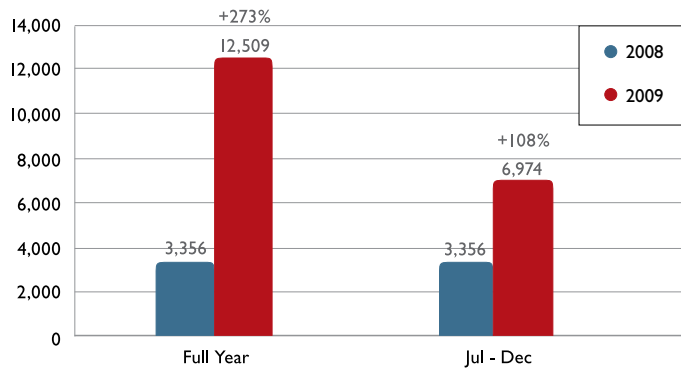
The monthly average number of individuals who visited the website in 2009 was 1,880 compared with 973 in 2008.

### Total number of visits to website (inc. multiple visits by an individual) 2009 vs 2008

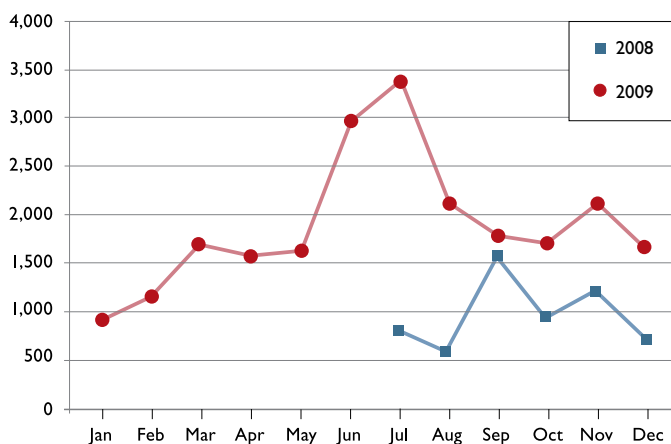


Note: The CSI website was launched in July 2008

### Total number of new visitors to website 2009 vs 2008



### Number of individuals who visited the site (monthly) 2009 vs 2008

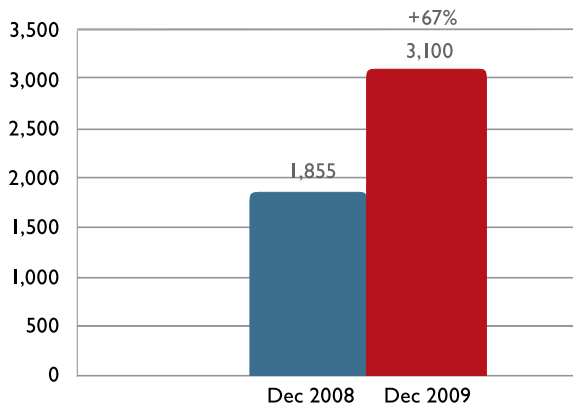


Traffic to the website is variable. It is influenced by the initiatives conducted by CSI each month. For example in September 2008 the PRIA scholarships were advertised and in July 2009 the 'Managing in a Downturn' report was launched. Both of these initiatives resulted in a significantly increased level of traffic to the site in these months.

## CSI database

CSI's database of contacts grew to 3,100 by December 2009. This database contains contact information for people who wish to stay informed about CSI initiatives, either through the CSI electronic newsletter or other communication methods.

### Number of people sent regular communications 2009 vs 2008



## Knowledge Connect

In 2009, our Knowledge Connect quarterly literature reviews discussed the following themes:

- Issue 1: Leadership – distributed to 2,256 contacts
- Issue 2: Innovation – distributed to 2,620 contacts
- Issue 3: Social investment – distributed to 2,280 contacts
- Issue 4: Measuring Social Impact – distributed to 2,991 contacts

Visit [www.csi.edu.au/knowledge-connect](http://www.csi.edu.au/knowledge-connect) for Knowledge Connect articles.

In an effort to disseminate learnings more broadly from our many speakers throughout the year, we produced 15 podcasts and 20 videos which were made available to the public on our website.

Visit [www.csi.edu.au/videos](http://www.csi.edu.au/videos) to access these broadcasts.

## Other publications

### CSI papers

CSI staff wrote five briefing papers, seven issues papers, five background papers and four lecture series papers in 2009.

Among the range of CSI publications, **Gianni Zappalà** wrote papers on 'Approaches to Measuring Social Impact in the Third Sector' (in collaboration with Mark Lyons), and 'Spirituality is the New Black'.

Visit [www.csi.edu.au/publications](http://www.csi.edu.au/publications) to access the full range of publications.

### Government submissions

Eight government submissions were made, four to the Productivity Commission on the Contribution of the Not-for-Profit Sector, and four to the Department of the Prime Minister and Cabinet. **Peter Shergold** contributed to the WA Economic Audit.

## Public profile

### Conferences

CSI staff spoke at 22 conferences during 2009. **Peter Shergold** spoke about corporate responsibility at the DAVOS Future Summit, and at the Adelaide Festival of Ideas he discussed whether corporate responsibility has reached its limits.

**Cheryl Kernot** discussed 'Social Value Creation' at the Crunch Time Policy Conference in Sydney and presented on 'Social Enterprise Models for Local Communities' at the Partners in Employment Forum in Campbelltown.

**Kylie Charlton** was a panellist at the Social Enterprise World Forum.

### Speeches

CSI staff made 113 speeches in 2009, with **Peter Shergold** and **Cheryl Kernot** delivering the vast majority of these. Peter made several presentations at the Singapore Civil Service College on a range of topics including leadership and the implications for public policy of social innovation. He also addressed the New Zealand State Services Commission conference on new ways of delivering services to citizens.

**Cheryl Kernot** spoke about the changing social landscape at the Women on Boards forum and also was one of the FaHCSIA Eminent Speakers presenting on 'Over the Horizon: The New Social Landscape and How Government Can Respond'.

For a full list of speeches and conferences made by CSI staff in 2009, refer to our 2009 Annual Report appendix at [www.csi.edu.au](http://www.csi.edu.au)

## Articles

**Peter Shergold** had opinion pieces printed in The Australian, The Australian Financial Review, The Sydney Morning Herald and The Canberra Times. He was also published in Social Space, Ethos and Australian Philanthropy.

He contributed a chapter to: *'Supping with the Devil? Government Contracts and the Non-Profit Sector'*, edited by P Saunders and M Stewart-Weeks.

**Cheryl Kernot** had articles printed in the Brisbane Times, The Age, The Centre for Policy Development and Social Traders Magazine.

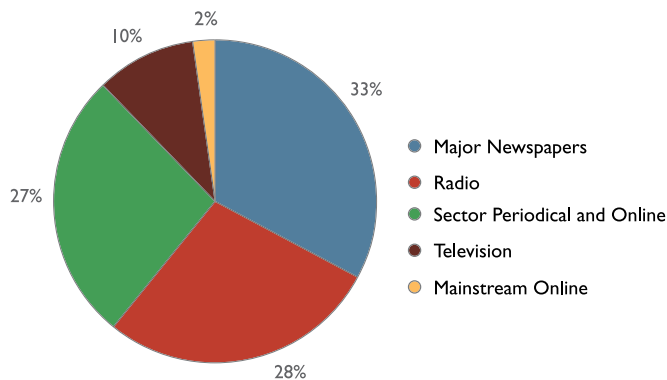
For the full list of CSI articles refer to our 2009 Annual Report appendix at [www.csi.edu.au](http://www.csi.edu.au)

## Media

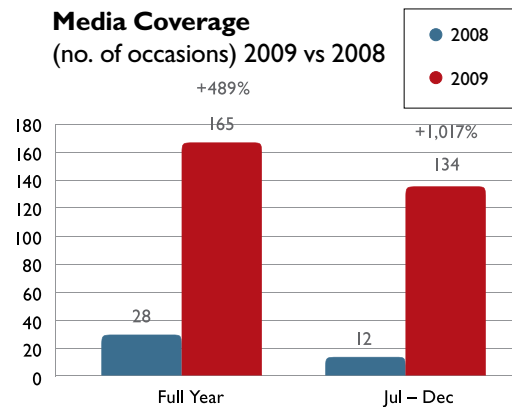
In 2009 CSI received media coverage on 165 occasions. These ranged from mentions of CSI to views expressed by CSI staff to substantial opinion pieces by CSI staff. **Peter Shergold** and **Cheryl Kernot** were both profiled on a number of occasions. Both also undertook radio and TV interviews and commentary.

One-third of all media coverage appeared in newspapers, with radio and sector periodicals at almost 30% each, and TV at 10%. Media coverage for CSI increased almost five-fold in 2009 compared with 2008, when we received coverage on 28 occasions.

### Media Coverage by Type 2009



### Media Coverage (no. of occasions) 2009 vs 2008



## Goal 5: Collaboration

**Goal – To facilitate successful collaboration between the business, government and third sectors in the proactive pursuit and advocacy of beneficial social outcomes**

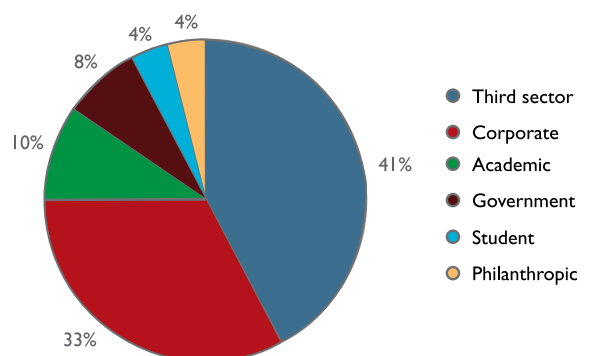
### Measure 5.1 – Annual impact survey of stakeholders

Refer to page 17 for a summary of findings for our first annual impact survey.

### Collaborations & Partnerships

In 2009 CSI engaged in 48 collaborations with corporate partners, foundations, third sector organisations and local government. Collaborations included the delivery of action-based research projects, events, executive courses and the provision of scholarships.

### Collaborations by sector type 2009





## Goal 6: Sustainability

Goal – To build a sustainable base of expertise and funding to achieve our purpose over the long term

### Measure 6.1 – Retention of intellectual expertise

By the end of 2009 17 staff worked for CSI. The effective full-time equivalent was 9.9.

Only one staff member left during 2009: Danielle Begg left us to undertake graduate study in social policy at Oxford University.

### Measure 6.2 – Ability to attract funding to match the Commonwealth Government endowment

CSI was established in 2008 with funding from the Commonwealth Government and financial support from philanthropists and corporate supporters. The Commonwealth Government set a goal of \$12.5 million in matching funding to be received before 30 June 2012.

Matching funding includes donations, in-kind contributions and project income from non-Commonwealth Government sources. Matching funding to the end of 2009 is over \$8 million. Together with pledges already made for the future, a total of \$12.7 million will be received by the end of 2011. This exceeds the goal set by the Commonwealth.

Further fundraising continues to achieve a capital base to build the long-term sustainability of CSI. We are a typical not-for-profit organisation: our ambitions are always significantly greater than our level of resources.

### Measure 6.3 – Interest on capital endowment

As reported in 2008, the Commonwealth endowment is invested for a period of five years in Australian government bonds and a government-guaranteed term deposit. The proportion of core costs covered by the interest is 46%.

### Measure 6.4 – Financial Statements

#### Centre for Social Impact Financial Statements for the year ended 31 December 2009

PROFIT & LOSS		BALANCE SHEET	
<b>Income</b>		<b>Assets</b>	
Commonwealth grant matching funding	6,835,864	Petty Cash	400
Donations & Sponsorships	2,900,000	Accounts Receivable	575,343
Executive Courses	75,722	UNSW Trading Account	2,142,066
In Kind Contributions	1,706,736	Investment - Bond	10,220,930
Interest	1,189,620	Investment - Term Deposit	2,155,805
Projects	259,545	<b>Total assets</b>	<b>15,094,544</b>
Other	4,444		
<b>Total Income</b>	<b>12,971,931</b>		
<b>Expenses</b>		<b>Liabilities</b>	
Consumables	20,104	Prepaid Income - Grant	(4,104,136)
Contract & Consulting Services	455,979	Sundry Creditors	(17,116)
Equipment	9,155	<b>Total liabilities</b>	<b>(4,121,252)</b>
In Kind Contributions	1,706,736		
Marketing	48,201	<b>Net Assets</b>	<b>10,973,291</b>
Partnership Payments	10,000		
Postage & Courier	7,094	<b>Equity</b>	
Room Hire & Catering	98,869	Retained Earnings	0
Salaries & Oncosts	1,562,272	Commonwealth matching funding preserved	8,395,864
Scholarships, Grants & Donations	157,135	Donations & sponsorships preserved	2,577,427
Telephone & Utilities	9,197	Unrestricted Surplus / Deficit for the year	0
Travel & Accommodation	129,644	<b>Total equity</b>	<b>10,973,291</b>
Other	12,722		
Interest expense	0		
<b>Total Expenses</b>	<b>4,227,107</b>		
Surplus / (Deficit)	8,744,824		
Less: Commonwealth matching funding preserved	(6,835,864)		
Less: Donations & sponsorships preserved	(1,908,960)		
Unrestricted Surplus / (Deficit)	(0)		

# Our People



## Peter Shergold

Peter Shergold is the Macquarie Group Foundation Professor. In 2008 he took up the challenge of establishing CSI because it provided a chance to promote greater acknowledgement of the importance of the third sector.

Peter was a CEO in the Australian Public Service for two decades. For five years from February 2003, he was Australia's most senior public administrator serving as Secretary of the Department of the Prime Minister and Cabinet. He served four Prime Ministers and eight Ministers in both Coalition and Labor governments.

Peter received a first-class Honours BA in Politics and American Studies from the University of Hull; an MA in History at the University of Illinois; and a PhD in Economics from London School of Economics. In 1985 he became Head of the Department of Economic History at UNSW, working closely with non-government organisations in the area of ethnic affairs. He has taught at the University of Illinois, Southampton University, London School of Economics and Pennsylvania State University.

Peter has twice been awarded a Fulbright Scholarship. He was elected a Fellow of The Academy of Social Sciences in Australia in 2005. He is also a Senior Visiting Fellow of the Singapore Civil Service College, a Fellow of the Australia and New Zealand School of Government and of the Institute of Public Administration Australia.

Peter was made a Member in the Order of Australia (AM) for public service on Australia Day 1996. In 2007, he was elevated to Australia's highest award, the Companion in the Order of Australia (AC). He remains actively involved in the third sector. In late 2009, he was recognised by *The Sydney Magazine* as one of Sydney's hundred most influential leaders for his community activities.

## Mark Lyons in Memoriam

Professor Mark Lyons, the Director of Research at CSI, died in November 2009.

Mark was known among those who worked with him as an extraordinary person: generous with his time, his ideas and his encouragement. Mark was a pioneer in the study of the third sector and devoted himself unstintingly to the development of third sector studies in Australia and abroad. Australian third sector study has been deeply enriched by Mark's work. Although he will be greatly missed, his outstanding contribution will live on.

Mark produced the definitive text on the sector, *The Third Sector: The Contribution of Nonprofit and Cooperative Enterprises in Australia* published in 2001. His extensive series of articles explored most aspects of not-for-profit organisations, and for most Australian researchers he was the first and last person to talk to about the sector.

Mark was diagnosed with cancer soon after he joined CSI. He was extraordinarily brave as he fought his illness and continued to work productively at CSI until he was forced to retire in October. At CSI we remember Mark with great warmth and affection. We learned a great deal from Mark's willingness to share openly his experience and deep understanding of third sector organisations. Mark is survived by his wife, Carolyn Pettigrew, and sons Bede and Benedict.



CSI continues to impress us with the way it has speedily established a position as a thought leader in the Australian social economy.

**Matthew Percival,  
General Manager  
Public Affairs, AMP**

In its short life the Centre has proven to be a highly effective, even dynamic catalyst for connecting and enhancing the performance of the not-for-profit sector; and facilitating the engagement of business in social enterprise.

**Geoff Allen, Director,  
The Allen Consulting Group**

# New staff



## Kylie Charlton

Kylie holds the part-time position of Social Investment Fellow where she is actively involved

in examining the development of a system of social finance in Australia. Previously she was the Heloise Waislitz Fellowship for Swinburne's Asia Pacific Centre for Social Investment and Philanthropy. Kylie is also a Managing Director and founding team member of Unitus Capital. Kylie was Vice President in the Project and Structured Finance Group at Citigroup with 11 years experience in commercial and investment banking in Sydney and New York prior to transitioning her career into social finance. Kylie holds a BA in Commerce (Banking and Finance) from the University of Canberra and an MBA from the Saïd Business School at Oxford University.



## Elena Douglas

Elena works for CSI (WA). She has a deep interest in public policy, community development,

philanthropy and social enterprise. Elena has a track record of creating and leading new initiatives in a range of for-profit and third sector settings and is an advocate of increasing the role of the community benefit sector. She has a strong interest in international affairs. In 2009, Elena was a steering committee member and international affairs adviser for In the Zone, a biennial public policy conference in the Asian time zone. Elena is the convenor of the Religion & Globalisation initiative at UWA, a partnership with the Tony Blair Faith Foundation. From 2002–2007 Elena was the founding CEO of Advance Global Australians headquartered in New York. She led the creation of a network of over 15,000 Australians overseas. During her time in New York she observed first hand the power of philanthropy in creating a vibrant civil society and innovative social enterprises. One of her aims is to share this experience and expertise in Australia. Elena started her working life in the public service in Canberra and developed an expertise in program evaluation and performance measurement. She has worked closely with Australian State and Commonwealth Governments on both sides of politics, designing and launching

initiatives and contributing to policy debates. In April 2008 she attended the Prime Minister's 2020 Summit in the Economics stream.



## Les Hems

Les is Director of Research and is responsible for implementing and refining CSI's research

strategy. Les is at the forefront of research to develop an evidence base to support third sector policy and practice, and specifically the development of databases, web based knowledge resources, and innovative research methodologies. Over recent years Les has performed a range of roles with GuideStar UK including being the architect of the free public website [www.guidestar.org.uk](http://www.guidestar.org.uk) and its underlying database of information on 160,000 registered charities. Most recently Les headed up the social enterprise GuideStar Data Services CIC to monetise the value inherent in the database and to transform GuideStar into a self-sustaining enterprise.

In 2000 Les established a research centre at University College London (UCL) focusing on Voluntary Sector Policy and Research. In 2002 he established a program of research focusing on the incentives and barriers to philanthropy. Les taught a Voluntary Sector Policy module on the UCL MSc in Public Policy between 2000 and 2009. Between 1998 and 2000 he was the Principal Researcher on the John Hopkins University Comparative Nonprofit Sector Project and led on the impact measurement component of the project.

Les's interest in the third sector started at Aston Business School in the early 1990s through undertaking baseline surveys of charities for the Office for National Statistics and a range of policy and applied research. In 1998 Les developed a number of key initiatives including the Almanac publication which remains the basic reference source for the voluntary sector in the UK. He instigated an annual conference for voluntary sector academic and sector researchers which is now in its 15<sup>th</sup> year.



## Mei-Ling Ho

Mei-Ling has been appointed to the new role of Marketing and Communications Manager where

she is responsible for managing communications, media liaison and promoting the Centre's activities. Mei-Ling brings a unique blend of experience

to the team having worked in marketing for blue chip corporate companies. More recently, she has been a marketing specialist in the third sector over the last five years. During her time in the corporate sector with companies such as Diageo, Nestle and Unilever, Mei-Ling observed and became passionate about the role major corporations could play in helping deliver community outcomes. This resulted in her transitioning to the third sector in 2005 to take up the role of National Corporate Partnerships Manager with United Way. During this time Mei-Ling led the development of the 'Local Eyes' campaign which raised awareness of key social issues, and launched the major-cause related marketing program with The Good Guys electrical retailer, which involved 70 retail stores and United Way chapters nationally. In 2007, Mei-Ling joined The Australian Charities Fund as Marketing Manager. In this role she led two major industry research projects into workplace giving. The studies have resulted in a new set of recommendations and initiatives being undertaken across corporates and third sector organisations to increase funds raised through workplace giving. Mei-Ling has a Bachelor of Commerce (UNSW) majoring in Marketing and Business Japanese. She completed the Sydney Leadership Program at the Benevolent Society in 2007.



## Patrick McClure

Patrick McClure is the newly appointed Ethics Fellow of CSI and The St James Ethics Centre. He

is a leader in the third sector with experience in running successful state and national enterprises. He was CEO of the Society of St Vincent de Paul (NSW/ACT) for four years and CEO of Mission Australia for nine years. During that period the organisation was transformed from a small state-based entity to a highly successful international enterprise with 3,000 staff providing employment, training, housing, youth and family services for disadvantaged Australians. Patrick was Chairperson of the Commonwealth Government's Reference Group on Welfare Reform, Deputy Chairperson of the Welfare to Work Consultative Forum and a member of the Prime Minister's Community Business Partnership. He was Chairperson of the OECD-LEED Forum on Social Innovation, based in Paris. He has been involved in the issues of welfare reform, social innovation and community capacity building for many years. He was awarded an Order of Australia (AO) in 2003 and an

Australian Centennial Medal in 2001. He was selected as an AFR-BOSS True Leader in Australia in 2005, and was winner of the Equity Trustee's EQT CEO Award for 'Lifetime Achievement' in 2002.



**Ian Williamson**

Ian Williamson holds the Helen Macpherson Smith Chair of Leadership for Social Impact, a joint appointment with CSI. He heads the Asia-Pacific Centre for Leadership for Social Impact at Melbourne Business School, Ian has had a longstanding personal and professional interest in the third sector and his extensive work within the business community provides him with a strong platform to broker and develop cross-sector partnerships and collaborations. Ian joined MBS in July 2006 as Associate Professor, and has since been active in teaching, researching and consulting on the international stage. He teaches human resources management and organisational behaviour. His research examines how organisations recruit, retain and derive value from human resources. His work has been published in several leading academic journals and he has served on the editorial board of the journal *Academy of Management Review* and also as a Research Fellow of the Intellectual Property Research Institute of Australia (IPRIA). Prior to joining MBS, Ian was on the faculty of the Robert H. Smith School of Business at the University of Maryland, where in 2004 he received the Robert H. Smith School of Business Krowe Teaching Award. Ian completed his PhD in Organisational Behaviour at Kenan-Flagler Business School, University of North Carolina.

## Current staff



**Sarah Adams**

Sarah has recently joined CSI as a research assistant following the completion of her undergraduate studies at UNSW, after working as a volunteer with CSI on several research reports. Sarah holds a BCom/BA with First Class Honours from UNSW. Her final year thesis examined sustainability reporting and assurance practices and the cost of equity capital.



**Catherine Armitage**

Catherine Armitage is a well-known writer and researcher who works part-time for CSI. She has had a distinguished career as a senior newspaper journalist and editor, winning national prizes and government scholarships for her writing on a range of subjects. She was a business and science writer for the *Sydney Morning Herald*. She became the Australian newspaper's first Higher Education Correspondent, its China Correspondent based in Beijing for four years from 2002 to 2005, and its Higher Education Editor from 2006 to 2008.



**Danielle Begg**

Danielle worked as the Centre's Projects Manager until September 2009. With a Bachelor of Psychological Science (Honours) from the University of Queensland, Danielle joined the Department of the Prime Minister and Cabinet graduate program in 2006. She was the Young Queenslander of the Year in 2002 for her work establishing the youth advocacy group Australian Teens Advocating Change. She was a recipient of the Centenary Medal of Federation for her contributions to social justice. Danielle has now left CSI to undertake a Masters of Science in Social Policy at Oxford University. We miss her.



**Jan Cochrane-Harry**

Jan was, during 2009, the Director of Strategic Marketing and Partnerships, and Director of the Asia Pacific Centre for Leadership for Social Impact at Melbourne Business School, where she has worked since 2005. Jan's prior experience has included ten years in government (Housing, Community Services and Tourism), ten years in the community sector, and ten years in the private sector, the final five as Head of Philanthropic Foundations at Perpetual. She has an MBA from the University of Melbourne.

**Janette Corcoran**

Janette is Executive Director of the Asia Pacific Centre for Social Investment and Philanthropy at Swinburne University. Previously, Janette worked in Johannesburg as Program Director of Research with Ashoka Southern Africa and partnered with GIBS (University of Pretoria) to investigate social

entrepreneurship and its contribution to community development. Prior to this, Janette was an academic in the Faculty of Business and Economics at Monash University where she investigated the merging worlds of the 'corporate and the social', specialising in the commercial exchange of knowledge.



**Meiko Georgouras**

Meiko started work at CSI in 2008, in the position of Student Administrative Assistant. She is in her final year of the Bachelors in Design at UNSW. Meiko has an interest in the role designers can play in helping to identify cohesive and widely applicable solutions to the complicated social and environmental issues faced by communities today. She strongly believes in cross-faculty studies and utilising the variety of knowledge sources available at academic institutions to inform the design and application of service systems.



**Debbie Haski-Leventhal**

Debbie is the post-doctoral NAB Research Fellow. She gained her MA and PhD in the management of third sector organisations from the Hebrew University in Jerusalem and completed her doctoral dissertation on organisational socialisation of volunteers. She has since published widely on different aspects of volunteerism. Debbie's post-doctoral year was spent at Penn University in Philadelphia. She has twice gained the Emerging Scholar Award from the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA). Debbie was appointed a member of the committee on the Israeli President's Volunteer Award in 2008 and was part of the establishing committee of third sector scholars in Israel.



**Cheryl Kernot**

Cheryl Kernot is Director of Social Enterprise. In this role, her focus is on coordinating CSI's teaching programs, specifically the new Graduate Certificate in Social Impact across the four partner universities. Cheryl teaches the foundation course 'Social Impact: Entrepreneurs and Social Innovation'. From 1993-1997, she enjoyed a distinguished political career as Leader of the Australian Democrats and from 1998-2001 as Labor Shadow Minister.



Cheryl spent five years working in the UK as a Program Director at the Skoll Centre for Social Entrepreneurs at the Saïd Business School at Oxford University and as the Director of Learning at the School for Social Entrepreneurs, London.



#### **Esther Lefas**

Esther is the Events Manager. Esther has a background in events management and administration

supporting the Cyprus Studies Centre at London Metropolitan University (LMU), which aimed to promote general, tourist, political, cultural as well as academic issues. Esther also has experience in the travel and tourism industry, as well as teaching ESL for business purposes. She gained her BA in Business and Events management from the LMU.



#### **Michael Liffman**

Michael is the founding Director of Swinburne University's Asia-Pacific Centre for Social Investment and

Philanthropy. Michael has a background in philanthropy, social policy, research, and community work. He was the CEO of one of Australia's leading private foundations, The Myer Foundation, and President of the Australian Association of Philanthropy. Michael's publications include 'A Tradition of Giving: Seventy-five Years of Myer Family Philanthropy', (Melbourne University Publishing, 2004).



#### **Lisa Lusthaus**

Lisa works as the Centre's Secretariat Officer. She has a Bachelor of Science, Applied Psychology

(Honours) from UNSW. She began her career as a research psychologist at The Royal Alexandra Hospital for Children, working in the Child Safety Centre on child accident prevention. She was a member of the Child Accident Prevention Foundation of Australia (CAPFA). She also worked with the 'David and the Helping Hand' Child Safety health program and has published articles on child safety. Lisa founded MicroPress, a news bulletin specially written for primary school children to encourage them to read about current affairs. Micropress was a finalist in the NSW Awards for Small Business as well as the WG Walkeley Awards for journalism.



#### **Penny Mack**

Penny Mack is the part-time Accountant for the Centre. She has a wealth of prior experience at UNSW,

including as Senior Management Accountant in Accounting Services and as Finance Manager at the Australian School of Business. Penny is a member of CPA Australia. She holds a Bachelor of Business (Accounting) from Curtin University of Technology and a Postgraduate Diploma in IT for Business from the City Polytechnic of Hong Kong.



#### **Anne Measday**

Anne is CSI's General Manager, managing the business and program activities of the Centre. Her focus

in 2009 was on building the partnership and the collaborations, and working with the many supporters of CSI. Anne was previously General Manager at the Australia and New Zealand School of Government. Prior to that she was Director of the MBA (Executive) program at AGSM and Manager of the Centre for Continuing Legal Education at UNSW. Anne has an LL.M from Harvard University, an LL.B from the University of Adelaide and a ML.MEd from the University of Newcastle.



#### **Barbara Merz**

Barbara is the editor of Knowledge Connect, CSI's quarterly review of social impact ideas. Barbara holds a Juris

Doctorate from Stanford Law School. Barbara worked as business analyst at McKinsey & Company before joining the William and Flora Hewlett Foundation. She directed the Philanthropy Program at Harvard University's Global Equity Initiative. She is a Fulbright scholar, holds an MA in Politics from Victoria University, and earned her BA from Princeton University.



#### **Nikita Nagesh**

Nikita works as a student administrative assistant and is a third year Commerce (Finance)/Law student

at the University of New South Wales. She has a strong interest in the third sector, particularly in development. Nikita has been involved with the Yellow Shirts O-week program, Capital Women's business club, and Law Society moot competition.



#### **Chris Norgrove**

Chris is the Executive Assistant to Peter. She brings extensive experience from the corporate sector,

previously working as an Executive Assistant with KBR, Sydney IVF Limited, HRM Consulting Pty Ltd and Brisbane City Travelodge. Chris has completed an advanced Certificate in Travel and is a qualified International Travel Consultant.



#### **Andreas Ortman**

Andreas is a CSI Research Associate. He took up his current position of Professor of Experimental and

Behavioural Economics in the School of Economics at UNSW in 2009. Prior to this he was the Boston Consulting Group Professor of Economics at CERGE-EI, a joint workplace of Charles University and the Academy of Sciences, Prague in the Czech Republic. He was also a visiting scholar of the Program on Non-Profit Organizations at Yale University and the Harvard Business School. His work has been published in many leading journals in economics and other behavioral sciences. His interests are wide-ranging and include game theory, experimental economics, the history of economic thought and quality assurance in markets for experience and credence goods. He has a particular interest in governance in for-profits and third sector firms.



#### **Gianni Zappalà**

Associate Professor Gianni Zappalà works part time with CSI. He developed and taught CSI's

new Corporate Responsibility and Accountability course, participated in several CSI in-house training programs, and published several papers on corporate responsibility and social impact assessment. Gianni also consults to the Westpac Foundation. Prior to joining CSI, Gianni held appointments at the Universities of Sydney, Cambridge, Wollongong, the ANU, and also worked at The Smith Family. Gianni has a First Class Honours Degree in Economics from the University of Sydney, a Masters (with Distinction) in Political Science from the University of London and a Doctorate from the University of Cambridge.



# Our Board



**Frederick Hilmer AO (Chair)**  
President and Vice-Chancellor,  
The University of New South Wales



**Geoff Allen AM**  
Director and Founder, The Allen  
Consulting Group



**Sally Capp**  
CEO, Committee for Melbourne  
*Sally resigned in late 2009 in order to  
take up the position of Victorian Agent-  
General in London.*



**David Clarke AO**  
Chairman, Macquarie Group Ltd  
*David stood down from the board for reasons  
of ill-health.*



**Robin Crawford**  
Director, Macquarie Capital  
Alliance Management Ltd.



**Glyn Davis AC**  
Vice-Chancellor, The University  
of Melbourne



**David Gonski AC**  
Chairman, Investec Bank (Australia) Limited  
Chairman, Coca-Cola Amatil (Australia) Pty Ltd  
Chancellor, UNSW



**Greg Hutchinson**  
Senior Advisor, Bain & Company



**Fergus Ryan**  
Director, The Commonwealth Bank  
of Australia



**Peter Shergold AC**  
The Macquarie Group Foundation  
Professor, CSI



**Michael Ullmer**  
Deputy CEO, National Australia Bank



**Ian Young**  
Vice-Chancellor, Swinburne University  
of Technology

# CSI Advisory Councils

CSI has three Advisory Councils in Melbourne, Sydney and Western Australia. With the opening of CSI at UWA in September 2009, a new Advisory Council was established, chaired by Michael Chaney, Chancellor of UWA. The Councils, representing the philanthropic, corporate, government and third sectors, provide advice to CSI on its teaching and research priorities, stakeholder relationships and public policy issues. The Councils met three times during the 2009 year, with particular interest in the provocation issues. These included: *'Are not-for-profit organisations forsaking their mission?'*, *'Have business schools failed the test of social responsibility?'* and *'Is measuring social impact a waste of time?'* The Councils are very valuable to CSI in assessing priorities, and the support of their members throughout the year is vital to our success.

## Sydney members

**CHAIR: David Gonski, Chancellor, UNSW**

**John Azarias** – Senior Partner, Deloitte Touche Tohmatsu

**David Baffsky** – Chair, ACCOR

**Mark Bagshaw** – MD, INNOV8 Consulting Group

**Tony Berg** – Director, Gresham Partners

**Catherine Brenner** – Non-Executive Director, Coca-Cola Amatil

**Mary-Jo Capps** – CEO, Musica Viva

**John Colvin** – CEO, Australian Institute of Company Directors

**Robin Crawford** – Director, Macquarie Capital Alliance Group

**Ian Darling** – Chairman, The Caledonia Foundation

**Jon Dobell** – Partner, Ernst and Young

**Tracey Fellows** – MD, Microsoft Australia

**Patrick Forth** – Managing Partner, Boston Consulting Group

**Toby Hall** – CEO, Mission Australia

**Jack Heath** – Founder and Executive Director, Inspire Foundation

**Elaine Henry** – CEO, Smith Family, Chair, Nonprofit Australia

**Frederick Hilmer** – President and Vice-Chancellor, UNSW

**Narelle Hooper** – Editor, Australian Financial Review Boss Magazine

**Peter Hunt** – Executive Chairman, Caliburn

**Greg Hutchinson** – Senior Advisor, Bain & Co.

**Mark Johnson** – CEO, PricewaterhouseCoopers

**Sue Lennox** – CEO/Co-Founder, OzGreen

**Danny Lester** – Head of Placement, Australian Employment Covenant

**Helen Liondos** – Foundation Manager, AMP Foundation

**Sam Meers** – Executive Director, Nelson Meers Foundation

**Rick Millen** – Australian Foundation/Global Communities Partner, PricewaterhouseCoopers Australia

**Allan Moss** – Principal, Allan Moss Investments

**Pip Murphy** – CEO, Australian Charities

**Sue Murray** – CEO, National Breast Cancer Foundation

**Warwick Negus** – CEO, Colonial First Global Asset Management

**Dawn O'Neil** – CEO, Lifeline Australia

**Andrew Penfold** – CEO, Australian Indigenous Education Foundation and Director of the ANZ Stadium Club

**Richard Peters** – Head of Community Finance & Development, National Australia Bank

**Daniel Petre** – Trustee, Petre Foundation, Executive Chairman, Netus

**John Picot** – CEO, St Vincent de Paul Society

**Maxine Rich** – Executive, Investec

**Jillian Segal** – Director, NAB and ASX

**Doug Snedden** – MD, Accenture

**Richard Spencer** – CEO, Benevolent Society

**Fred Street** – Patron of the Arts and Opera

**Doug Taylor** – CEO, United Way

**Michael Traill** – CEO, Social Ventures Australia (SVA)

**Jayne Meyer Tucker** – National Director, Good Beginnings Australia

**Sue-Anne Wallace** – Fairfax Foundation

**Dick Warburton** – CEO, Board of Taxation

**Joanna White** – Group Manager, Corporate Responsibility, National Australia Bank

**Julie White** – Head Macquarie Group Foundation

## Melbourne members

**CHAIR: Geoff Allen – Director and founder Allen Consulting**

**Gina Anderson** – CEO, Philanthropy Australia

**Yehudi Blacher** – Secretary, Victorian Dept of Planning and Community Development

**Jo Cavanagh** – CEO, Family Life

**Robyn Charwood** – Consultant, Philanthropy Partners ANZ Trustees Ltd

**Patricia Cross** – Director, Qantas / NAB / Wesfarmers

**John Dahlsen** – Former ANZ board, Director Nonprofit Australia

**Sarah Davies** – CEO, Melbourne Community Foundation

**Glyn Davis** – Vice-Chancellor, University of Melbourne

**John WH Denton** – Partner and CEO, Corrs Chambers Westgarth

**Julie Edwards** – CEO, Jesuit Social Services

**Michael Henry** – Chair, Oxfam Australia

**Janet Hirst** – CEO, Ian Potter Foundation

**Rebecca James** – CEO, Research Australia

**Graeme John** – CEO, Australia Post

**Graham Kraehe** – Chairman, Bluescope Steel

**Paul Linossier** – CEO McKillop Family Services

**Sam Lipski** – CEO, Pratt Foundation

**Eve Mahlab** – Founder Mahlab Group, former Westpac Director, Convenor Women Donor's Network

**Gerard Menses** – MD, Vision Australia

**Naomi Milgrom** – CEO Sussan Group

**Tony Peake** – Partner, PricewaterhouseCoopers

**Cary Pedicini** – CEO, Volunteering Australia

**Matt Rockman** – Co-founder, SEEK

**Sue Renkin** – CEO, Open Family

**Fergus Ryan** – Director, Clayton Utz, CBA

**Kate Spargo** – Director, Pacific Hydro Ltd, Investec Bank

**Robert Tickner** – CEO, Red Cross

**David Thompson** – CEO, Jobs Australia

**Christopher Thorn** – Exec Director, Philanthropy Services, Goldman Sachs JB Were

**Natalie Toohey** – Board Member, Australian Wine & Brandy Corporation

**Michael Ullmer** – Deputy Group, CEO, NAB

**Alison Watkins** – CEO, Bannellong Group

**Ian Young** – Vice-Chancellor, Swinburne University of Technology

## Western Australia members

**CHAIR: Michael Chaney – Chancellor, UWA, Chairman of NAB**

**Sue Ash** – CEO, WACOSS

**Wayne Bergmann** – CEO, Kimberley Land Council

**Carl Binning** – Vice-President Sustainability, BHP Billiton

**Joe Calleja** – CEO, Richmond Fellowship

**Ron Chalmers** – Director General, Disabilities Services Commission

**Peter Conran** – Director General, Dept of Premier and Cabinet WA

**Jeff Dowling** – Managing Partner, Ernst & Young

**Annie Fogarty** – Executive Director, The Fogarty Foundation

**Vanessa Guthrie** – VP Sustainability, Woodside

**Chris Hall** – CEO, Uniting Care West

**Stan Perron** – Chairman, Perron Group of Companies

**Anne Russell-Brown** – Group Director Social Outreach & Advocacy, St John of God Healthcare

**Chris Ryder** – Partner, Corrs Chambers Westgarth

**Jan Stewart** – CEO, Lotterywest

**Deidre Willmott** – Chief of Staff and Cabinet Secretary, Department of Premier and Cabinet WA

**Peter Shergold is the CSI representative at all Advisory Council meetings**

## We Need Your Help

The capacity of CSI to create beneficial social impact depends on the support we receive from our investors. Part of that is financial.

Every dollar helps. Here are just a few ways in which your investment in CSI could make a difference:

<b>\$500 - \$1,000</b>	would provide scholarships for not-for-profit attendance at a CSI executive course
<b>\$3,000</b>	would provide a scholarship to assist a CSI student to travel overseas
<b>\$5,000</b>	would provide a partial scholarship for a student to undertake the Graduate Certificate in Social Impact
<b>\$5,000</b>	would fund a CSI lunchtime or dinner event
<b>\$7,500</b>	would fund a CSI one-day event
<b>\$10,000</b>	would fund a visit to Australia by a leading overseas expert

Of course, we would be happy to talk to you about the focus of the event you would prefer to sponsor or the type of student you would wish to support. Scholarships or events can be named. Just let us know how you would like to help us grow.

Please contact us at [csi@unsw.edu.au](mailto:csi@unsw.edu.au) or phone Anne Measday on (02) 9385 9897 if you would like to talk to us as a partner.

*“The Australian School of Business is very proud to be associated with the Centre for Social Impact. CSI is providing much-needed business education for people working in the not-for-profit sector. It has conducted valuable research in the third sector, which has shed light on important issues such as the impact of the global financial crisis on NFP’s. CSI has raised awareness of social enterprises and social entrepreneurship and is inspiring a new generation of social entrepreneurs in Australia.”*

**Alec Cameron, Dean, Australian School of Business, UNSW**



*“2009 was a year of much thinking and activity around ‘social impact’ matters at Melbourne Business School and we were delighted with developments and collaboration with our Centre for Social Impact partners. The appointment of Professor Ian Williamson as the Helen Macpherson Chair of Leadership for Social Impact at MBS, has added significant capacity and strength to our ability to undertake research, teaching and community service through both the MBS centre and the CSI partnership.”*

**Jennifer George, Dean, Melbourne Business School**



*“The Asia-Pacific Centre for Social Investment and Philanthropy regards its participation in the CSI partnership as an outstanding way of extending both the content and the reach of our work in promoting the many and growing ways private resources can contribute to public good.”*

**Mike Donnelly, Dean, Faculty of Business and Enterprise, Swinburne University of Technology**

Mike commenced his role as Dean in February 2010.



*“We are delighted to be establishing the Centre for Social Impact here at UWA and look forward to creating the forum for meaningful engagement between the corporate, community and government sectors which will strengthen Western Australia’s capacity to share the benefits of prosperity.”*

**Tracey Horton, Dean, UWA Business School**



## the Centre for Social Impact

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