# **Philanthropy for Systems Change**

**Post-Series Implementation Checklist***Turn insights into action from the CHKI Reimagining Philanthropy Series*

*May 2025*

This Implementation Checklist draws on key insights and practical takeaways shared throughout CHKI’s *Philanthropy Reimagined* webinar series. It’s not exhaustive - nor is it meant to be. Instead, it’s a springboard: a tool to inspire action, deepen reflection, and guide your next steps. We encourage you to bring your own lens to this series and adapt, reshape, and expand on these ideas in ways that make sense for your work. Use this checklist to spark internal conversations, shape new partnerships, or refine your approach to funding and reform.

Most importantly, choose at least one action you can take forward today - small steps can lead to big system shifts.

Thank you for participating.

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The Centre for Healthcare Knowledge & Innovation (CHKI) drives knowledge exchange and collaboration to strengthen primary healthcare, reduce inequities, and improve health system resilience in North Coast NSW and across Australia. A Healthy North Coast program, it's proudly supported by Social Futures, Southern Cross University, University Centre for Rural Health, NSW Agency for Clinical Innovation, North Coast Allied Health Association & Ability Options.

## **🔁 1. Rethink Your Funding Purpose**

*From short-term projects to long-term, people-centred transformation*

🔲 **Reframe your “why”**: Reflect on the ultimate purpose of your giving. Is it filling a gap, enabling systemic change, or building long-term resilience?

🔲 **Lead with love, not just logic**: Embed empathy and connection into how you make decisions. Let values - not just processes - guide your philanthropy.

🔲 **Adopt a strengths-based lens**: Focus on what communities already have - not what they lack. Ask: What’s working here? How can we amplify it?

🔲 **Use storytelling as evidence**: Let lived experience shape the questions you ask, what success looks like, and how progress is measured.

🔲 **Promote gifts in wills**: Create simple pathways for people to leave a lasting legacy. Educate supporters on the long-term impact of these contributions.

*“Philanthropy is not about power, or money, or wealth, or influence... it’s love of people.”* – **Nigel Harris AM**

Notes

## **🤝 2. Fund Like a Partner, Not a Funder**

*Co-design, co-fund, and co-own the work with communities*

🔲 **Flip the power dynamic**: Ask whose definition of success is being used. Create space for community-led goals and co-design - not just consultation.

🔲 **Build trust before impact**: Prioritise relationships. Show up early, listen deeply, and offer support that strengthens capability, not just cash flow.

🔲 **Respect different types of philanthropy**: Whether it’s grassroots giving or major gifts, tailor your expectations and accountability approaches accordingly.

🔲 **Support safe spaces for honesty**: Encourage delivery partners to share what's *not* working. Create conditions for openness, not fear of failure.

🔲 **Engage consistently**: Don’t wait for reports. Build communication into the rhythm of your work - phone calls, site visits, informal check-ins.

*“Partners need to feel empowered to share authentic experiences... and not feel like they're going to put their funding at risk.”* – **Dee Rudebeck**

Notes

## **🔃 3. Diversify & De-risk Funding Models**

*Ensure resilience through blended, place-based, and future-proofed approaches*

🔲 **Diversify income streams**: Don’t rely on one funding source. Explore partnerships with corporates, community donors, and matched government funds.

🔲 **Blend and braid funding**: Use philanthropy to de-risk or prove a concept, then bring in public or private dollars to scale it.

🔲 **Fund backbone infrastructure**: Invest in coordinators, data roles, and digital tools that hold partnerships and reforms together.

🔲 **Prepare for the volunteer shift**: Fund future-ready models for rural and community-based volunteer work that are sustainable and inclusive.

🔲 **Co-fund with purpose**: Join forces with other funders on shared challenges. Pooling resources increases reach, credibility, and systems influence.

*“Use philanthropy to fund what the system can’t do - not what government won’t.”* – **John McLeod**

Notes

## **📊 4. Use Data Differently**

*Elevate stories, local insights, and community ownership*

🔲 **Fund community-owned data**: Let communities decide what to measure, how, and why. Back data that reflects lived experience - not just compliance.

🔲 **Elevate qualitative insights**: Treat interviews, stories, and reflections as legitimate evidence in your evaluations and case for support.

🔲 **Invest in local data skills**: Build capacity so communities can gather and use their own data to shape decisions and advocate for themselves.

🔲 **Design trauma-informed metrics**: For Indigenous and marginalised communities, allow space and time for healing and complexity in reporting expectations.

🔲 **Push for open access**: Advocate for shared data environments that reduce duplication and enable better health system planning.

*“Fund community-owned data: Let communities decide what to measure, how, and why.”* – **Natalie Egleton**

Notes

## **🛠️ 5. Redesign Accountability for Impact**

*Build frameworks that reflect context, care, and collaboration*

🔲 **Build trust-based accountability**: Replace rigid reporting with reflective practice, honest dialogue, and shared learning.

🔲 **Design for inclusion**: Ensure diverse voices - especially quiet or underrepresented ones - are at the table in decision-making and evaluation.

🔲 **Match scrutiny to scale**: Be fair in what you ask of small grantees vs. large institutions. Right-size your transparency expectations.

🔲 **Clean as you go**: Make transparency a habit, not a burden. Build simple, regular practices that keep things honest without being overwhelming.

🔲 **Frame challenges as collective, not personal**: When things go wrong, ask “what happened and what can we learn?” - not “who’s to blame?”

*“Don’t ask: who’s to blame? Ask: what happened and what can we learn?”* – **Deb Samuels**

Notes

## **Turn Insight into Action: What Our Experts Recommend**

As you take what you’ve learned into your work, here are simple actions and mindset shifts from some of our panellists to help spark change - whether you're applying for funding, collaborating with partners, or influencing policy.

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### **John McLeod**

**Simple Action:**Clearly define why you and this action should be supported. The *Case for Support* and the *Impact* it will have.

**Mindset Shift:**Think big and bold. So, not "I've got these $ what can I do" but rather "this is what I want to do, so how do I get these $". You’ll have a much better chance of exciting potential supporters.

### **Dee Rudebeck**

**Simple Action:**Start a conversation with a funder or organisation aligned to your work or mission and see where it goes.

**Mindset Shift:**Challenge your beliefs and try new perspectives.

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### **Deb Samuels**

**Simple Action:**

Invest in building authentic relationships. Pick up the phone. Grab a coffee. Send a quick note with a link to a shared interest. Not to make an 'ask' but to share and learn together.

**Mindset Shift:**

Philanthropy can take strategic risks on early stage ideas, which can build evidence and confidence that ripples out to other resources. Listen deeply to and partner with small community based organisations to unearth and support people and hidden gems of ideas that can create the step change towards lasting impact.

### **Nigel Harris AM**

**Simple Action:**If we think about philanthropy as love of people and frame it in the context of our response to each other, then we connect it purpose rather than money. And that can reframe the way we engage in giving and receiving gifts as a transformational experience rather than transactional.

**Mindset Shift:**What challenges your thinking and shapes your actions to influence different approaches to the way your organisation views and engages in philanthropy, and how does that change what you might accomplish over time?

### **📈 Tim Pullen**

**Simple Action:**Create or update your Theory of Change - in collaboration with key internal and external stakeholders, including a constructive critic.
As you do, explore these key questions:

* What assumptions are we making - and how strong is the evidence for the casual links those assumptions imply?
* Where is the uncertainty - and how might we address it through data, learning or feedback?
* Whose perspectives are missing - and how might including them reshape our understanding of the challenge or solution?
Co-developing and iterating your Theory of Change in this way strengthens its logic, builds credibility and produces a tool you can confidently use to guide decisions, secure funding and communicate your impact strategy.

**Mindset Shift:**Shift from asking "How do we fund what we're doing?" to asking "What would it take to transform the system we're working in - so it delivers better outcomes for people - and who needs to be at the table, with trust and shared purpose?"

### **Carolyn Vincent**

**Simple Action:**Connect with at least 1-2 people daily at an authentic level. Aim is to build on your already existing relationships both in your personal and professional life.

**Mindset Shift:**Listen like you know nothing. A beginner’s mindset.

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### **Dr Alexandra Williamson**

**Simple Action:**Whenever possible, pick up the phone and have a conversation rather than sending an email.

**Mindset Shift:**Think of transparency as one of very many forms of accountability, and one that’s often but not always appropriate.