



The Ross Trust Five-year Strategy

July 2019–June 2024



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Strategic intent

The Ross Trust has a 50-year history of responsive grantmaking with a strong, enduring legacy of supporting Victorians and their communities.

Between July 2018 and June 2019, the Ross Trust reviewed its purpose to ensure its core business of grantmaking was responsive to current community issues, with relevant, contemporary and evidence-based grantmaking practices.

Philanthropic practices or trends are widely written about in the philanthropic literature and at times, attract some controversy. Through conversation about these practices and trends, and their applicability, the Ross Trust has developed a five-year strategy that will not only adopt some of these best practices but explore some new trends and ideas.

Philanthropy is a vital part of the community with the privilege and freedom to operate with independence. It is not philanthropy's role to identify problems and create solutions, but it is philanthropy's responsibility to be responsive to the social sector and enable implementation of possible solutions. Reducing the number of funding areas and enabling impact to be discussed, measured and possibly achieved, was a focus of the Ross Trust's strategic discussions.

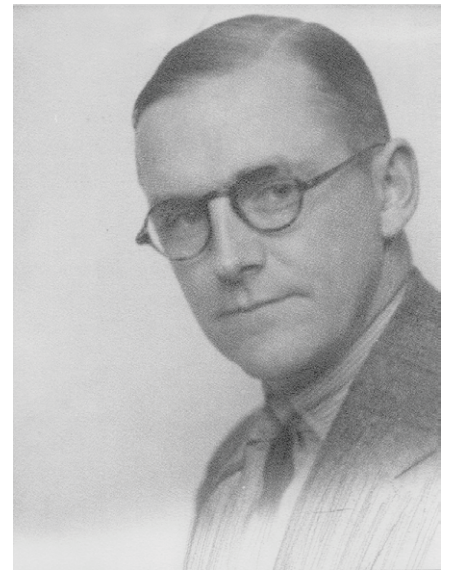
One of the other great privileges of philanthropy is its ability to take risks, both for the grantmaker and grantseeker. This great freedom provides

the breeding ground for many solutions to complex social problems to be invented, catalysed, experimented with and scaled. It also allows for rethinking about what we have learned and then adapting accordingly. Implementation of the Ross Trust's strategy will allow us to continue to take risks and learn along the way.

Solutions often involve changing attitudes, behaviours and policy, which is a slow process over a long period of time. The Ross Trust acknowledges that no one organisation can do this and we should seek to collaborate with many others, including government, community groups, like-minded organisations and philanthropic peers.

The intent of this new five-year strategy is to contribute to meaningful improvements and change in the areas of **educational equity** and **biodiversity conservation**: two refined focus areas that the Ross Trust has already supported in a variety of ways since inception. This strategy reflects refreshed practices, approaches and lessons from the past 50 years of grantmaking. It adopts contemporary and revised accountabilities for us, as a perpetual charitable Trust, and our grantees as service delivery leaders, to create opportunities for greater engagement and influence.

Remembering our benefactor **Roy Everard Ross**



Mr Ross was born in Mansfield, Victoria on 6 July 1899 and died in Melbourne on 1 November 1970.

In 1916 Mr Ross undertook training as a geologist, surveyor and engineer at the Working Men's College, Melbourne (now RMIT) and spent much of his working life as an engineer and surveyor in Gippsland, mostly in the Warragul, Buln Buln and Narracan Shires. His quarry interests started in 1946, ending with the purchase of Hillview Quarries in Dromana in 1968, two years before his death.

In 1959, Mr Ross started investing in shares, building a portfolio of stocks. As a successful businessman, Mr Ross's other interests were starting to emerge, notably technology and conservation. He was particularly passionate about trees and provided many people with tree planting advice.

Mr Ross was described as a man with entrepreneurial spirit with a strong interest in quarrying. His early quarrying business ventures started in 1942 with his first quarries being in Berwick, then Narre Warren and later, at Tullamarine. In 1959 Bayview Quarries became a public company, joining with Reid Quarries and Mr Ross was the major shareholder. Bayview Quarries purchased some 13 sites as potential quarry and sand pits, prior to its takeover by Boral Pty Ltd in 1966. In 1968 Hillview Quarries was formed after acquiring T.W Maws & Sons Quarries Pty Ltd, located at Arthurs Seat in Dromana.

Roy Everard Ross died on 1 November 1970, whilst playing golf at the Royal Melbourne Golf Club. He left \$8.9 million to charity. The media reports stated "He was a keen bushman and had extensive knowledge of native plants and trees..... he fought for the establishment of the quarry at Dromana with the intention of providing further funds for the charitable trust.... he then asked them (The Trustees) if they would administer the Trust and the distribution of the income from the investments". Hillview Quarries was described as the 'lifeblood of the Trust'.

In 1969 Mr Ross made his Will. Apart from two personal legacies upon the death of his wife Molly, all the income in perpetuity from his estate was to go to 'charities or charitable purposes'. In addition, he further wished that "in paying or applying the said income my Trustees shall have regard to the circumstances prevailing from time to time (to) give consideration to the desirability of the provision of funds for the education and maintenance of foreign students in Australia and for the acquisition preservation and maintenance of national or public parks and particularly the protection of flora and fauna."

For the next five years the Ross Trust has chosen to focus on "charitable purpose" and "the acquisition preservation and maintenance of national or public parks and particularly the protection of flora and fauna". This will be delivered through a grantmaking focus on educational equity and biodiversity conservation across Victoria.

Strategic framework



OUR VISION

To create positive social and environmental change so Victorians can thrive



OUR VALUES

Ethical, sustainable, innovative, adaptive, compassionate.

The Ross Trust is grateful for the foresight and philanthropy of our benefactor, the late Roy Everard Ross.



OUR MISSION

We address disadvantage and inequity, and facilitate change by:

- delivering educational opportunities for vulnerable young Victorians,
- enhancing biodiversity for the sustainability of Victoria's native flora, fauna and ecosystems,
- maintaining the flexibility to respond to Victorians in crisis and work collaboratively to build the capacity of the philanthropic and social sectors.



HOW WE WORK

The Ross Trust is a compassionate and responsive philanthropic leader. We act with integrity and work transparently to foster ideas and innovation, achieve long-term impact and systemic change.

Granting strategy

The original corpus of the Ross Trust comprised the whole Estate of Mr Roy Everard Ross who died in 1970. Mr Ross left a portfolio of assets for the Trust comprising shares, real property and a quarry, today operating as Hillview Quarries. All the profits from the Ross Trust's Hillview Quarries business are given to the Trust and make up around 70 per cent of the Trust's income.

The quarry is located on the Mornington Peninsula and as such the Trust considers its continued support for this region as one of its grantmaking priorities. Up to July 2019, approximately \$18.3 million in grants and product has been given to the Peninsula area by the Trust and Hillview Quarries. This represents nearly 14 per cent of the Ross Trust and Hillview Quarries combined giving to Victorians.

The two main focus areas for the next five years of grantmaking are:

1. Biodiversity Conservation
2. Educational Equity.

In addition, and in keeping with our history of grantmaking, the Ross Trust will fund other areas of need through the provision of responsive grants. This includes responding to Victorians in crisis and building a strong and robust for-purpose sector.

The Ross Trust responsive grants will support:

- emergency relief
- natural disasters
- human rights
- for-purpose sector leadership (philanthropic and not for profit sectors).



Ross Trust Five-year Strategic Framework

— A snapshot

Our vision

To create positive social and environmental change so Victorians can thrive

Our mission

We address disadvantage, inequity and facilitate change by: delivering educational opportunities for vulnerable young Victorians, enhancing biodiversity for the sustainability of Victoria's native flora, fauna and ecosystems, and maintaining the flexibility to respond to Victorians in crisis and work collaboratively to build the capacity of the philanthropic and social sector.

Agreed alignment with key aspects of Mr Ross' Will

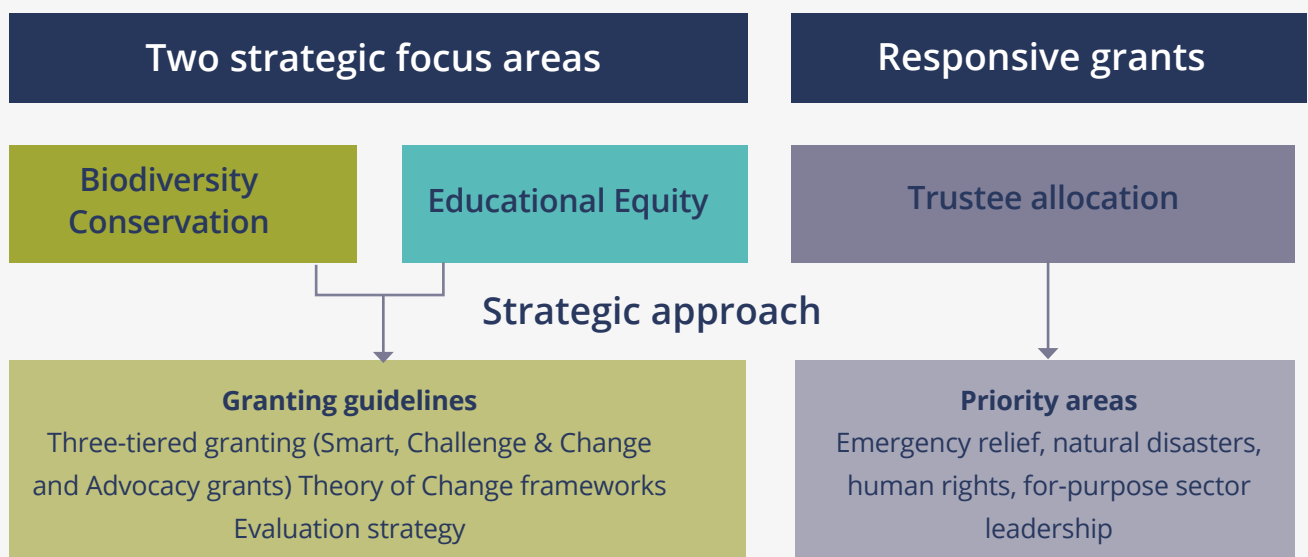
Desirability of the provision of funds to and maintenance of national or public parks and particularly the protection and preservation of flora and fauna.



Apply the income therefrom in perpetuity to or for such charities or charitable purposes as my trustees may in their absolute discretion from time to time determine.

Our values

Ethical, sustainable, innovative, adaptive, compassionate



Biodiversity conservation

Conserving and managing our natural environment has intrinsic, social, economic and cultural value, such as providing health and well-being through cultural connection and recreation, clean air and water, productive landscapes and carbon sequestration. However, Victoria's biodiversity is generally poor and native species continue to face major challenges including habitat loss, from urban development, invasive species and climate change.

The Ross Trust recognises the challenges to conserving Victoria's biodiversity and protecting our unique native species. To contribute to addressing this issue, the Trust will work towards a desired change that is focused on conserving and building resilience in Victoria's land and marine environments. This desired change will assist with guiding the Trust's work and that of those seeking funding, to target and focus our work together towards common outcomes.

The Ross Trust's Biodiversity Conservation funding priority supports increased and coordinated biodiversity conservation actions and increased community support for conservation. It is informed by the United Nations' Sustainable Development Goals 14 and 15, knowledge from our grantees, published research and sector expertise.

Biodiversity Conservation Desired Change

Victoria's biodiversity is conserved, protected and valued by all as part of a healthy and resilient environment.

Levers for change

Through a comprehensive approach of reviewing research and expert consultations, the Ross Trust identified three 'levers for change' that support and contribute to achieving the Biodiversity Conservation Desired Change:

- **Build collaborations and partnerships** – coordinate planning and action to conserve Victoria's biodiversity.
- **Build organisational capacity** – support organisational sustainability and equip organisations and communities to advocate for the protection and preservation of Victoria's biodiversity.
- **Improve public awareness and education** – so that Victorians understand the value of biodiversity and act to conserve and protect it.

The Biodiversity Conservation granting strategy is underpinned and informed by:

1. The Biodiversity Conservation Knowledge Paper: written with reference to the latest evidence and data.
2. The Biodiversity Conservation Granting Guidelines: informed by the Knowledge Paper, sector expertise and philanthropy colleagues.
3. The Biodiversity Conservation Theory of Change Framework: developed in partnership with experienced evaluators and changemakers.

Educational equity

School retention and secondary school impact an individual's ability to gain secure employment, adequate income across a lifetime, and a flexible career path. They also have implications for Australia's economic growth, productivity, creativity, innovation, social progress and wealth.

There are many factors in a child's background which can play a significant part in their ability to succeed at school. Some of the known direct and indirect barriers that impede access to education include; poverty, experiences of violence and bullying, remoteness, lack of cultural safety for Aboriginal and Torres Strait Islander children and coming from a refugee or migrant background.

Through a review of published research, sector expertise and intelligence from our grantees, it is clear certain cohorts of children and young people experience barriers to educational opportunity and attainment, particularly in early education and at school transition points.

The Ross Trust recognises that the challenges to achieving educational equity and enabling young people to complete secondary schooling are particularly complex and multi-faceted. To contribute to addressing this issue, the Trust will work towards a desired change to support the improvement of educational outcomes for vulnerable students. We will support evidence-based practices which engage and partner with students, not only in the classroom, but in the home and community. This desired change will assist with guiding the Trust's work and those seeking funding, to target and focus our work together towards common outcomes.

The Ross Trust's Educational Equity funding priority is focused on improving educational attainment of Victorian children. It is informed by the United Nations' Sustainable Development Goal 4, knowledge from our grantees, published research and sector expertise.

Educational Equity Desired Change

Young people in Victoria have equitable access to educational opportunities so they complete secondary school.

Levers for change

Through a comprehensive approach of reviewing research and expert consultations, the Ross Trust identified three 'levers for change' that support and contribute to achieving the Educational Equity Desired Change:

- **Increase early learning participation** – support engagement in early learning (ages 0-5) and improve readiness to commence primary school.
- **Support at education transition points** – support students, schools and communities to reduce educational disengagement at critical transition points
- **Strengthen school and community connections** – enhance school effectiveness and capability to establish and maintain engagement.

Transition points in a child's education present a set of opportunities and challenges as they grow and progress in their learning. The three critical transition points in education are:

- from early childhood education and care into formal schooling
- from primary school into secondary school
- from secondary school into senior secondary, further education, training or employment.

The Educational Equity granting strategy is underpinned and informed by:

1. The Educational Equity Knowledge Paper: written with reference to the latest evidence and data.
2. The Educational Equity Granting Guidelines: Informed by the Knowledge Paper, sector expertise and philanthropy colleagues.
3. The Educational Equity Theory of Change Framework: developed in partnership with experienced evaluators and changemakers.

Trustee responsive grants

From time to time, the Ross Trust Trustees will provide responsive grants to support:

- emergency relief
- natural disasters

- human rights
- for-purpose sector leadership (philanthropic and not for profit sectors).

Grants will be made based on funds available. Their impact may be broader than Victoria.

Granting structure

Generally, the focus on granting in Victoria and to Victorian-based organisations will remain but Australia-wide impact and operations can be considered on a case-by-case basis.

Focus area grants

Three type of grants are available within the two focus areas: **Biodiversity Conservation** and **Educational Equity**.

1. Smart Grants: up to \$40,000 per year for up to three years. Maximum request \$120,000. These grants are unsolicited and can be applied for all year round, pending eligibility.

2. Advocacy grants: up to \$50,000 per year for up to three years. Maximum request \$150,000.

These multiyear grants are by invitation only. This is a new type of grant for the Ross Trust. Supporting advocacy is a growing area of interest for the social sector and the recent published material informed our decision making and crafting of this future grantmaking opportunity. Supporting advocates of systems change in not-for-profit organisations and social change movements is another way for philanthropy to support the root causes of many social problems.

3. Challenge and Change Grants: between \$40,000–\$100,000 per year for up to three years. Maximum request \$300,000. These multiyear grants are by invitation only. The Ross Trust will actively seek opportunities and encourages organisations to make contact with the Trust.

Trustee responsive grants

Trustee responsive grants up to \$50,000 per year for up to three years. Maximum request \$150,000. These multiyear grants are by invitation only. The Ross Trust will actively seek opportunities and encourages organisations to make contact with the Trust.

Exclusions

There are a range of grant exclusions which mean an organisation will not qualify for funding by the Ross Trust. They are:

- organisations or projects operating, or seeking to operate, under auspicing arrangements
- capital fundraising and general fundraising appeals
- organisations that receive direct income from entities whose principal purpose is to promote gambling, alcohol, tobacco or armaments
- organisations whose funded activity may seek to proselytise a particular faith or religion to its beneficiaries
- universities and other institutions seeking funding for academic research projects or research positions with no or minimal research translation activity or no community-based partners (please note, the Ross Trust will only accept one funding request for biodiversity conservation and/or educational equity, per university in each funding round)
- retrospective funding.