



OUR
STRATEGY

2018 - 2024



MESSAGE FROM THE CHAIRMAN



HAND HEART POCKET IS AN INDEPENDENT CHARITY FOUNDED BY THE FREEMASONS OF QUEENSLAND. WHEN OUR ORGANISATION WAS FIRST ESTABLISHED IN QUEENSLAND IN 1907 OUR FOREFATHERS HAD THE FORESIGHT AND COURAGE TO FULFIL A REAL, UNMET NEED IN SOCIETY.

Since then societal norms have changed significantly, so to ensure we can continue our benevolence work for the next 110 years and beyond, we have undertaken extensive research to identify the current and emerging contemporary issues impacting Queenslanders.

We have also consulted with members on how to best support their charity work, which has informed our strategy for the future.

Over the decades since starting in aged care, much has changed to affect individuals, families and the community. The sector has become more complex and reforms and regulations more demanding. Our problems and concerns changed too, as have the areas of social need and social support, with mental health, homelessness and domestic violence representing recent disturbing growth trends. The idea of a 'typical family' is also now quite different to what it was all those years ago. To ensure support is provided in the areas of greatest need into the future, the Board will utilise the best information, networks and technology available to it.

We intend to be one of Queensland's top charities that provides support to the communities of Queensland and Papua New Guinea. We will provide three levels of support: grass-roots, significant and flagship. These will ensure that we can assist as many people as possible. And, we will work with vibrant, creative partners, other service providers, philanthropists and benefactors to ensure that our brand remains associated with our values.

In 2016, as we transitioned away from aged care and retirement living, the Board launched its Interim Strategic Plan which identified the immediate priorities for the organisation while a longer-term strategy was

established. During this time, feedback was sought from Members – both via a survey and through face-to-face visits – to understand how to best support their charity work and the needs in their communities. Concurrently, to inform this strategy, we completed thorough literature reviews into societal changes over time, the current charitable space as well as current and emerging health and social needs within Queensland and Papua New Guinea.

Our strategic plan, which will commence in March 2018, seeks to guide the organisation to address emerging, contemporary needs by giving a hand up – not a handout – to individuals, communities, Masonic connections and other charities that have limited access to alternative funding. Hand Heart Pocket will create a ripple effect with its impact, through various layers of contemporary clans and communities, to ensure the charitable work of Freemasons in Queensland can continue in perpetuity.

A handwritten signature in blue ink that reads "J. P. Wiltshire".

Tom Wiltshire
Board Chairman

OUR IDENTITY, PURPOSE AND VALUES

IDENTITY

Building on the legacy of Freemasonry, we empower, support and enable humanity in an ever-changing world.

PURPOSE

Through engagement with Members and communities, we identify opportunities to provide sustainable support that delivers positive outcomes.

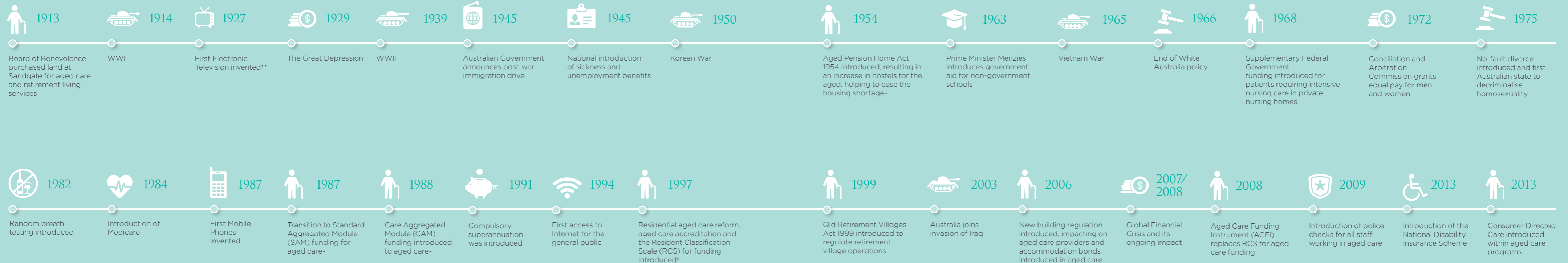
VALUES

Our values bind us together as an organisation and are reflected in everything we do.

- **Compassion:** Alleviate suffering and misfortune
- **Integrity:** Moral and ethical
- **Empowerment:** Equip people directly or through others to lead better lives.

'YOU ARE IMPORTANT TO US'

100 YEARS OF CHANGE



Source: National Museum Australia. (24 August 2017). Defining Moments in Australian History. Retrieved from: http://www.nma.gov.au/online_features/defining_moments

**Source: BeBusinessed.com. (23 August 2017). History of the Television. Retrieved from: <https://bebusinessed.com/history/history-of-the-television/>

^Source: RobotWorx. (24 August 2017). Industrial Robot History. Retrieved from: <https://www.robots.com/education/industrial-robot-history>

-Source: Parliament of the Commonwealth of Australia. (1993). Residential Care for the Aged: An overview of Government policy from 1962 to 1993. Retrieved from: <https://www.aph.gov.au/binaries/library/pubs/bp/1993/93bp32.pdf>

National Aged Care Alliance. (2001). Residential Aged Care Funding: Second Report. Retrieved from http://www.naca.asn.au/pdf/report_02.pdf

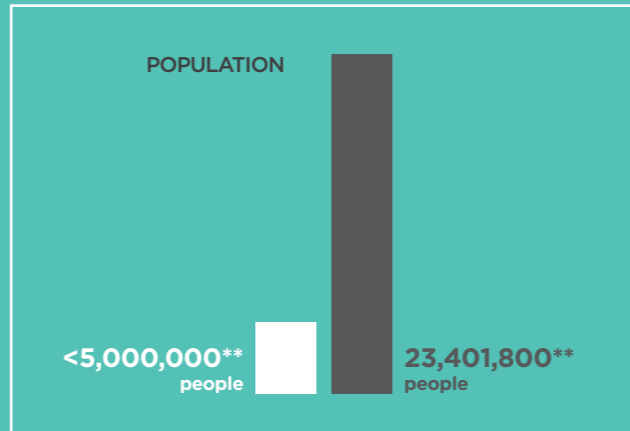
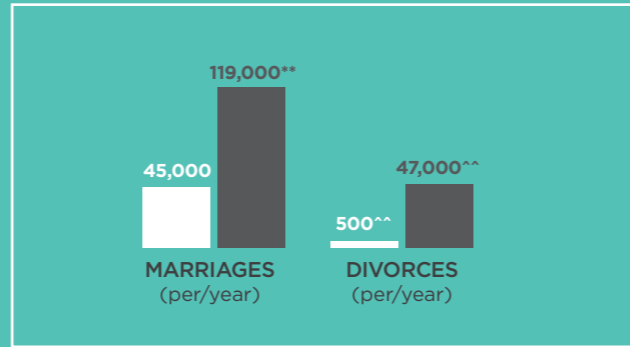
AUSTRALIAN CHANGES IN KEY SOCIAL AND HEALTH STATISTICS

AVERAGE HOUSEHOLD	DWELLINGS	SINGLE PARENT HOUSEHOLDS	HOMELESSNESS
4.5 PEOPLE /household ^{&a}	927,295^{***}	6.4% (1976) ^{&a}	NOT AVAILABLE
2.6 PEOPLE /household ^{##}	9,901,496^{##}	22% (2017) ^{**}	105,237 PEOPLE^{^^^}

MEDIAN AGE	FERTILITY RATE	POPULATION GROWTH	LIFE EXPECTANCY
22^{**}	3.1 CHILDREN per woman ^{**}	2/5THS immigration 3/5THS births ^{^^}	59.2 (men) 63.3 (women) ^{**}
37^{**}	1.8 CHILDREN per woman ^{**}	3/5THS immigration 2/5THS births ^{^^}	80.4 (men) 84.5 (women) ^{**}

^{**}Source: The Australian Bureau of Statistics 2017, The Australian Bureau of Statistics, viewed 30 August 2017, <http://www.abs.gov.au>
^{^^}Source: McCrindle 2017, McCrindle, viewed 31 August 2017, <http://mccrindle.com.au>
^{##}Source: The Australian Bureau of Statistics 2017, Census, viewed 31 August 2017, <http://www.censusdata.abs.gov.au>
^{&&}Source: Australian Institute of Family Studies 2017, Australian Institute of Family Studies, viewed 31 August 2017, <https://aifs.gov.au>
^{***}Source: The Australian Bureau of Statistics 2017, The Australian Bureau of Statistics, viewed 30 August 2017, <http://www.ausstats.abs.gov.au>
^{^^^}Source: Homelessness Australia n.d., Homelessness Australia, viewed 30 August 2017, <http://www.homelessnessaustralia.org.au>
^{###}Source: Department of Social Services n.d., Department of Social Services, viewed 31 August 2017, <http://www.dss.gov.au>
^{&&&}Source: State Library of Victoria n.d., Research Guides, viewed 30 August 2017, <http://guides.slv.vic.gov.au>
⁻⁻Source: Fairfax Media 2017, The Sydney Morning Herald, viewed 30 August 2017, <http://www.smh.com.au>
⁻⁻⁻Source: Lifeline Australia n.d., Lifeline, viewed 31 August 2017, <https://www.lifeline.org.au>
⁺Source: Conservation Volunteers Australia and the Australian Government Your Community Heritage Program 2014, ANZAC Living Memorial Project, viewed 31 August 2017, <http://www.livingmemorials.com.au>
⁺⁺Source: Australian Council of Social Service n.d., Australian Council of Social Service, viewed 30 August 2017, <http://www.acoss.org.au>

KEY ● 100 years ago ● Today



NO OF AGE PENSIONERS	LARGEST AREA OF EMPLOYMENT	% OF 14 TO 15-YEAR OLD'S STILL AT SCHOOL	LABOUR FORCE PARTICIPATION (women aged 25 - 34)
~73,000^{^^}	FARM LABOUR^{**}	31%^{**}	22.9%^{**}
~2,300,000^{^^}	HEALTH CARE^{**}	97.4%^{**}	67.8%^{**}

AVERAGE WEEKLY EARNINGS	NUMBER OF PEOPLE AGED 65 AND OVER	INFANT MORTALITY	SUICIDE RATE
£113.5/WEEK^{&&&}	1 IN 20 (5%) ^{&&}	70 INFANT DEATHS per 1,000 live births ^{**}	9.93 SUICIDES per 100,000 ⁻⁻
\$1,608.40/WEEK^{**}	ALMOST 1 IN 5 (20%)	3.2 INFANT DEATHS per 1,000 live births	12.6 SUICIDES per 100,000 ⁻⁻⁻

WAR PARTICIPATION
OVER 1.5 MILLION
 Australian men and women have served in eight major wars or conflicts during the twentieth century.
 More than **100,000** people died in action, more than **200,000** were wounded and more than **30,000** were taken as prisoners of war.^{**}

DEATH BY INFECTIOUS DISEASE (e.g., whooping cough, diphtheria and tuberculosis)	WAR VETERAN PENSIONERS	POVERTY
185 PER 100,000^{**}	13,000+	NOT AVAILABLE
1 PER 100,000	3,700 (06-07)^{**}	2.99 MILLION (13.3%) live below the poverty line ^{**}

MULTICULTURALISM AND POPULATION GROWTH ^{^^}

● 3/5 occurred due to natural increase from births and deaths
 ● 2/5 came from overseas migrants.

● 2/5 comes from natural increase from births and deaths
 ● 3/5 comes from immigration.

OUR RESEARCH

TO INFORM OUR STRATEGY, WE SOUGHT FEEDBACK FROM MEMBERS TO UNDERSTAND HOW TO BEST SUPPORT THEIR CHARITY WORK AND THE NEEDS IN THEIR COMMUNITIES.

We also investigated historical changes over time, the current charitable landscape as well as current and emerging health and social needs within Queensland and Papua New Guinea to identify key themes of need. Through this review, we identified key areas of need:



Research report

- Men's mental and physical health
- Women's financial and physical security
- Adolescents and young adults with mental health issues gaining employment
- The future challenges of funding social welfare with an ageing population.



Member survey

- Education
- Ageing population
- Promoting Masonic charity
- Funding and financial support
- Family support
- Members helping Members.



CEO roadshow

- Increased education and clarity around fundraising processes
- Increased clarity of governance reporting
- Fine tuning of promotions and communication.

OUR CHARITABLE INTENT

'Primarily, we will serve families, communities and Members across Queensland and Papua New Guinea'

Focusing on the needs of contemporary families, by 2024 we will:

- Continue to demonstrate measurable outcomes by providing a hand up – not a handout – at a grassroots level as well as through significant and flagship initiatives
- Establish the right relationships to provide greater outcomes in communities by linking community and individual needs to funding and charitable services
- Have stabilised our income to support key current and emergent social needs
- Be recognised as an organisation that champions and supports the legacy of Masonic charity within our communities
- Be robust and have processes that challenge existing paradigms to maintain relevance in an ever-changing world.

'100% of all donations will go to the designated purpose'*
*excluding legal fees where applicable

WE WILL SUPPORT



Education



Ageing population



Promotion of Masonic Charity



Funding and financial assistance



Members helping Members



Men's Mental and Physical Health



Women's Financial and Physical Security



Employment for youth with mental health issues



Funding for an ageing population.

OUR METHOD OF SUPPORT

We pledge:

- to work with creative partners and philanthropists to ensure our brand remains associated with our values;
- to foster new relationships that provide greater outcomes by linking community and individual needs to funding and charitable services
- to stabilise our income to provide continuity of support to current and emergent social needs;
- to champion and support the legacy of Masonic charity within our communities; and
- to constantly evaluate our approach to maintain relevance in an ever-changing world.

WE WILL FOCUS ON THREE KEY MECHANISMS:



Grassroots

We will work closely with Lodges at a grassroots level to identify areas of need and match Dollar-for-Dollar fundraising campaigns to directly help local community initiatives and those needing a small funding boost.

This will allow us to give to more recipients, with a higher level of Member involvement.



Significant

Our significant investments will provide large donations to organisations needing a hand up, to ensure they can deliver essential services for those who rely on them. Our previous significant donations include Youngcare and Camp Quality.

Our significant investments comprise of fewer recipients, but have a larger impact for organisations in need.



Flagship

Our flagship investments will provide substantial monetary gifts and donations to meet large and strategic areas of unmet need.

Our previous flagship donations include COUCH and the Queensland Brain Institute.

“We will be a contemporary, agile, and responsive organisation”

OUR APPROACH

GOALS	#1 Continue to make a positive difference by providing a hand up - not a handout - at a grassroots level, as well as through significant and flagship initiatives with measurable outcomes	#2 Build relationships to provide greater outcomes in communities that link community and individual needs with funding and charitable services	#3 Stabilise our income to support key current and emergent social needs	#4 Be a charity known for championing and supporting the legacy of Masonic charity within our communities	#5 Challenge existing paradigms to maintain relevance in an ever-changing world
STRATEGY	#1 Ensure enduring and positive impacts	#2 Build the right relationships	#3 Have a sustainable business model	#4 Honour our traditions and history	#5 A contemporary approach
HOW WE WILL ACHIEVE THIS	<ul style="list-style-type: none"> • Create a philanthropic committee to lead the organisation's philanthropic strategy • Ensure all philanthropic processes are transparent and equitable • Ensure the philanthropic strategy supports causes with limited access to other funding • Support and grow grassroots charity work through the Lodge network to meet local community needs • Identify significant and flagship initiatives that will make a substantial difference 	<ul style="list-style-type: none"> • Identify and build strategic and long-term relationships with suitable delivery partners • Identify and engage with strategic beneficiaries to achieve the greatest collaborative outcomes for the community • Ensure relationships support and enhance a positive brand • Focus on supporting reputable organisations that link essential services to people in need. 	<ul style="list-style-type: none"> • Generate a minimum budgeted return on the organisation's entire investment portfolio, to sustain its capital base • Work with other philanthropists and donors to increase our community impact • Grow our giving program to support our local charity and benevolent work • Maintain a risk management strategy that identifies and mitigates strategic and operational risks • Operate under a continuous improvement framework. 	<ul style="list-style-type: none"> • Provide regular updates to Members • Seek regular feedback from Members • Strengthen our programs to support Lodges' ability to deliver charitable support in their local communities • Establish and administer a separate Masonic Fund of Benevolence to broaden support for Members and their families • Keep Members informed of changing social needs so they may maximise outcomes in their local communities • Inform Members of current legislative and regulatory frameworks as they apply to Hand Heart Pocket • Develop a marketing and public relations strategy that promotes the charitable work of Freemasons and establishes a recognised brand. 	<ul style="list-style-type: none"> • Use fit-for-purpose technology to optimise delivery models • Identify and explore opportunities to support evidence-based social needs • Investigate social benefit bonds, in line with capital availability • Provide advocacy and leverage for existing services • Explore opportunities to contribute to the resolution of major social issues • Ensure work we do continues to support physical and mental wellbeing • Grow continuity funding and certainty of support to beneficiaries where appropriate.

The Board of Benevolence and of Aged
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