




BARLOW

FOUNDATION

THE FIRST FIVE YEARS

2014 - 2019

A photograph of a woman and a young girl sitting together, looking at a smartphone. The woman is on the right, wearing a dark top and a patterned scarf, holding the phone. The girl is on the left, wearing a light blue shirt. They are in a room with a patterned bedspread and a doorway in the background. The text is overlaid on the right side of the image.

**"Study after study
has taught us that
there is no tool for
development more
effective than the
education of girls."**

*- KOFI
ANNAN*

TABLE OF CONTENTS

01

EXECUTIVE SUMMARY

04

ABOUT US

05

CEO REMARKS

07

OUR BOARD

09

THE BEGINNING

11

GRANTS OVERVIEW

15

AUSTRALIA

21

ASIA PACIFIC

29

NEXTGEN

31

IMPACT INVESTMENT

33

LOOKING FORWARD

35

ACKNOWLEDGEMENTS



Drawn by **Sana**, 7 Years Old.

Supported by the Barlow Foundation, she received a scholarship through *The Smith Family* to attend school.

She wrote to us;

"You have saved a lot of lives."

EXECUTIVE SUMMARY

Since our inception in 2014, the Barlow Foundation has demonstrated a steadfast commitment to our vision of a better world, providing opportunities for all to thrive. However, this has been no simple feat. *Looking back to Look Forward* highlights the dedication that has been integral to our success over the last 5 years.

In that short time, by the completion of this present financial year, we will have granted over \$4.3 million to more than 30 not-for-profit organisations.

This report covers the full scope of the Foundation's 5-year journey, from funding the paving of a small catch up school in Cambodia to becoming leaders in the field of impact investing.

With words from our passionate board, overviews of where, what, and how we give, and visual representations of growth, *Looking Back to Look Forward* seeks to provide a holistic understanding of how our young but strong foundation has risen to the position it holds today.



BANGLADESH



FIJI



AUSTRALIA



ABOUT US

Established in 2014, the Barlow Foundation is inspired by founder Bev Barlow, whose beginnings as a teacher in Papua New Guinea in 1961 and a lifetime of giving underpins our guiding principle of self-improvement through self-empowerment.

The Barlow Foundation is a grant provider and impact investor that seeks to help people improve their lives through economic empowerment and education programs.

We deliver grants to organisations that work towards balancing inequality in Australia and the Asia-Pacific, with a particular focus on women and children. We believe this to be the key to addressing social inequality. In order to achieve this, we utilise impact investing alongside grant giving to ensure our impact is 100% socially beneficial.

Ultimately, our priority is to allow others the opportunity to thrive, finding their way out of disadvantage and towards self determination, happiness and success.



**DEBORAH
BARLOW**
CEO & CO-
FOUNDER

"Asking 'how can we have the greatest possible impact?' has always been my driving question."

CEO REMARKS

It started as conversations between mum, (Bev Barlow) and I. She had been very generous throughout her life, but wanted to do more, she wanted to be more formalized and thoughtful with her giving. So we set up a Private Ancillary Fund and Bev committed to seed fund it with 20 million dollars. I then established the governance structure with my siblings and our financial advisor, Greg Neave to be our board. We then began the work of who we would benefit through our giving.

I had read 'Half The Sky' by Nicholas D Kristof and Sheryl Wudunn and knew that women, through a hand up, not a hand out can change the course of their lives, their children's lives and their communities lives. I also came to appreciate the philosophy of helping them to help themselves through my own children's Montessori education. The path seemed clear.

The board met and debated. There was much to decide, who, how, where...but working together, backed by extensive research and a lot of conferences we did decide and in our first year proudly gave \$300 000 away to education and economic empowerment programs that benefited women and children in Australia and overseas. As the CEO with support from the family head office, I administered this from my kitchen table. I travelled with my husband Martin throughout Australia and Asia, meeting people, learning about programs, seeing what works and what doesn't. All the while determining where we can have the greatest possible impact .

Asking 'how can we have the greatest possible impact?' has always been my driving question. How can we do more, be better and truly effect real change in the lives of others?

A trusted advisor, Kate Kennedy, who was CEO of Hagar at the time helped me to fine tune the application process and how to assess the programs we supported. In 2018, she became our first outside hire and joined us on the board. Martin McKenna, my husband, joined the board after Chris Barlow resigned his position in 2017 as it is a guiding principle that we have strong family representation on the board at all times.

In 2017 we got an office, and I even had an assistant. We now had a strong passionate board with diverse views, an office in which to meet, and a very clear strategy for growth and improvement for the next 5 years.

I could not be prouder of what we have done in the first 5 years of The Barlow Foundation, giving away more than 4 million dollars and investing 4 times that in to social change-makers. As we continue to grow in size, we also grow in maturity, we now know how to have an impact, but we will continue to ask the question - how can we have the greatest possible impact?

And then do that.

OUR BOARD

Lisa Blundell
(since 2014)



Lisa is a company director. She is fluent in French, a published author and lives in Melbourne with her four teenage children.

"The foundation after five years is evolving into a fund with more focus on social impact investing as well as grant-making. It is also putting emphasis on supporting change-makers, supporting positive legislation, and affecting ethical strategists in our community."

Kate Kennedy
(since 2018)



Kate is a leader in the private, government and non-profit sectors. Having worked all around the world, she is now settled in Melbourne with her two children.

"Most global investment funds look for financial return on investment. Then the goodhearted ones give philanthropically later. Similarly most foundations do their philanthropic giving but do not include the investment of their funds in their creation of social value or impact funding. But why not do both? This is how this fund is breaking new ground."

Martin McKenna
(since 2018)



Martin's position on the board is supplemented by his job as a writer/director of film & television and as a father of two grown kids.

"After five years of work Deb Barlow has guided the Foundation from a relatively orthodox grant-making organisation into a very sophisticated utility for social improvement across multiple frontiers. The Foundation is now a significant investor in sustainable and ethical businesses. It is moving towards becoming a powerful supporter for advocacy, while also maintaining a firm commitment to traditional philanthropy."

Greg has worked with the Family for many years as a financial manager, and lives in Melbourne with his wife and two daughters.

"The foundation has been fortunate to be the product of two generations of determined, visionary women whom, through a combination of considered thought and decisive actions, have shown brave leadership to shape an organisation that is at the forefront of impact investing and strategic grant making in this country."

Greg Neave
(since 2014)





We funded the paving of the courtyard so that heavy rains which often flooded the entrance no longer prevented children from attending school

Phnom Penh, Cambodia

THE BEGINNING

Our journey of giving started with the funding of a 'Catch-up School' (pictured left) with partner *Hagar* in Phnom Penh, Cambodia in 2014.

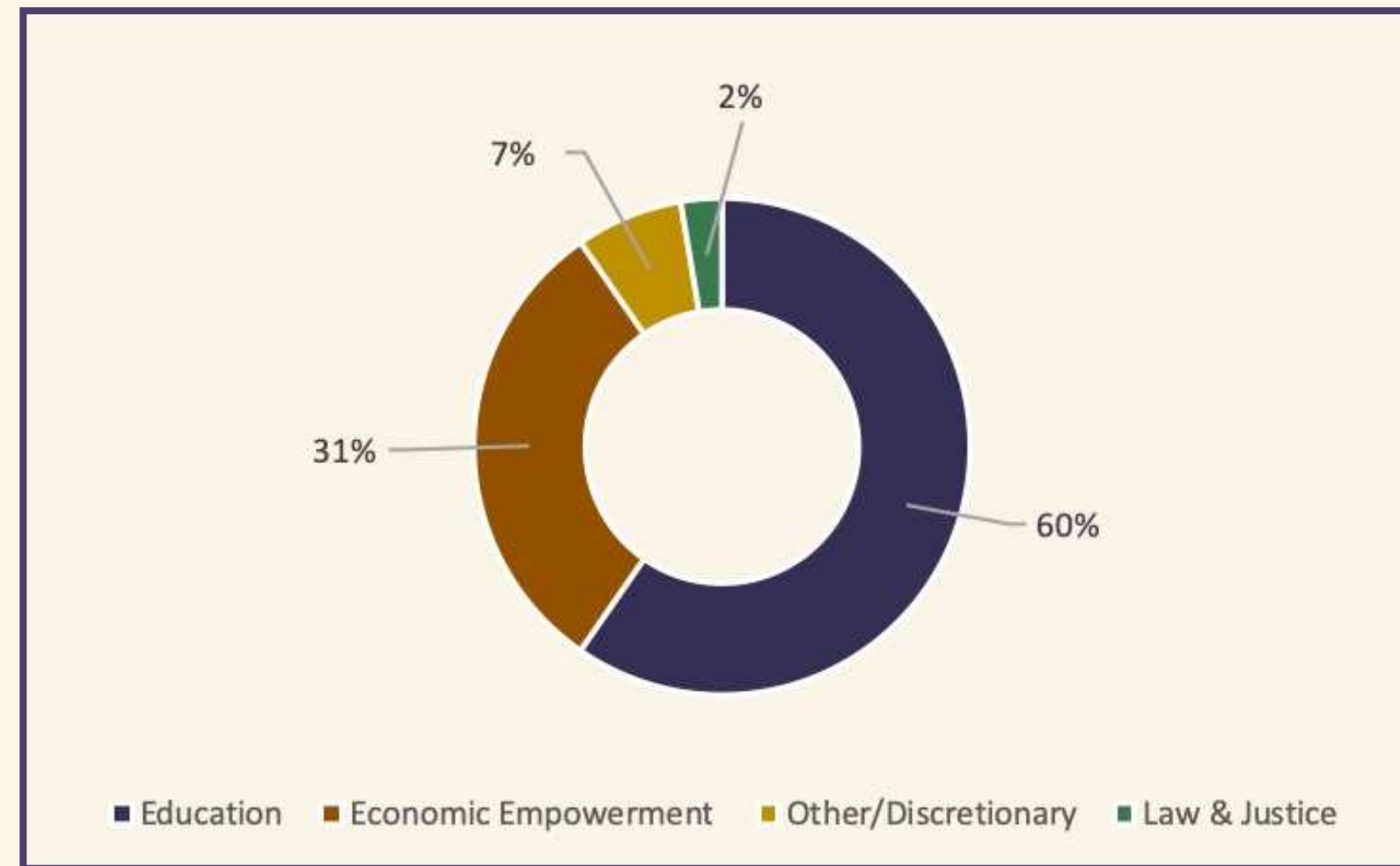
This grant enables primary-aged children who have had their lives and education interrupted by slavery to reach the academic and social levels of their peers. This is achieved through intensive schooling tailored to young boys and girls affected by the trauma of bonded labour.

The building of *Hagar's* 'Catch up School' acted as a launchpad, establishing the Barlow Foundation's core values of self-empowerment through the basic human right of education, regardless of an individual's background.

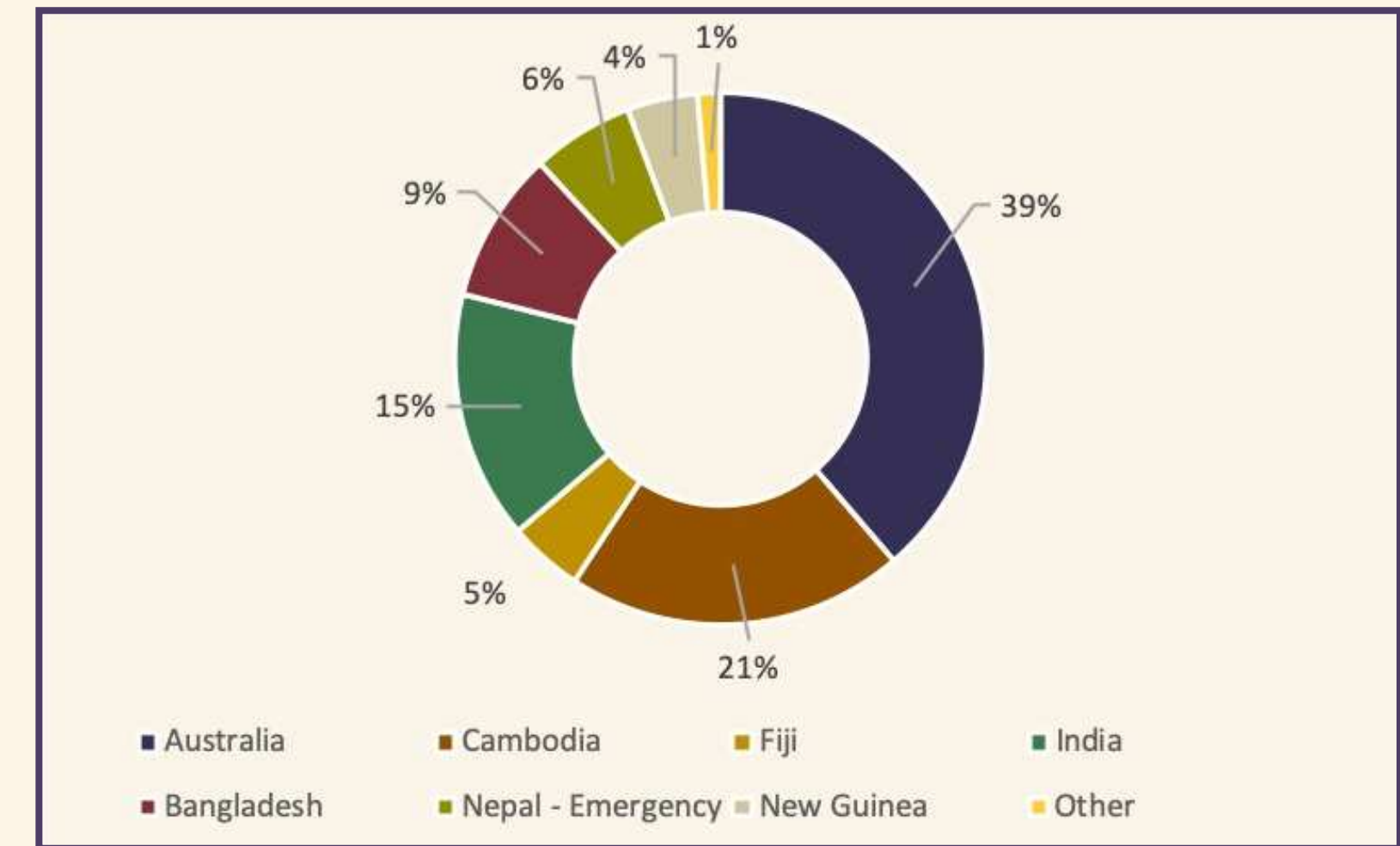
GRANTS OVERVIEW

2015 - 2019

BY THEME



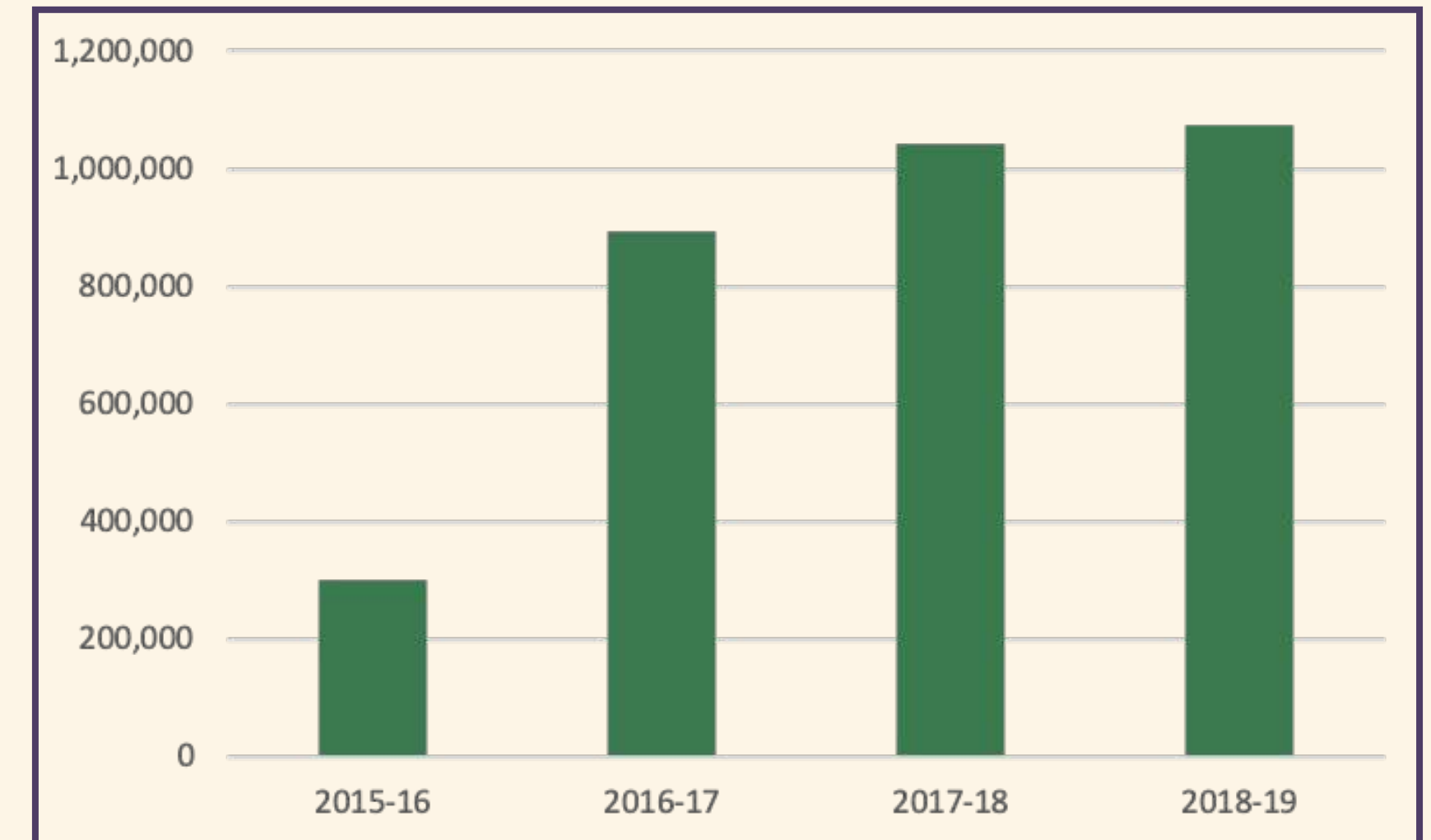
BY COUNTRY



WHERE



HOW MUCH



AUSTRALIA

Following our policy of giving where we see need, it is difficult to ignore the lack of equal opportunity in our own backyard, chiefly in respect to the oldest and newest Australians. The divides that exist in Australia based on class and social treatment disproportionately affect refugees, indigenous Australians, and those living in disadvantaged areas. The Barlow Foundation supports education and economic empowerment programs that are tailored to each of these unique groups, with a particular focus on women and children, to reduce these appalling disparities and assist individuals and communities in lifting themselves out of disadvantage.



EDUCATION

We have assisted *Stars* in delivering full-time mentoring to help indigenous girls in the Northern Territory stay in school until the completion of year twelve.



In our short history, we have granted over **\$1.2 million** to education programs in Australia.

In partnership with *Ardoch*, we have assisted in building language and literacy in playgroups and disadvantaged communities in Victoria.



Partnering with *Western Chances*, school children in Victoria's western suburbs have been granted merit-based scholarships to reach their academic goals.



We gave our support to *Reading Out of Poverty* to teach migrant mothers in Dandenong of the importance of literacy for their children.



We have partnered with *The Cathy Freeman Foundation* to deliver the 'Hippy' program on Palm Island, an initiative which prepares indigenous pre-schoolers for school.



With *The Smith Family*, we have delivered needs-based scholarships for hundreds of school children, predominately girls.



We have facilitated personal development programs through our relationship with *Reach*, assisting students from the suburbs of Melbourne find self empowerment with the guidance of youth mentors.





ECONOMIC EMPOWERMENT

In Partnership with the *Asylum Seekers Resource Centre*, we delivered womens empowerment programs and gender based legal advice for asylum seekers.



We have given over **\$52,000** to projects focusing on economic empowerment in Australia.



We supported *Carringbush* to empower adult learners to pursue their educational and vocational goals.



ASIA - PACIFIC

The Asia-Pacific region continues to suffer from deep socio-economic divides, necessitating fundamental, systemic change. Our work in the Asia-Pacific focuses on economic empowerment, particularly of women who represent two-thirds of the region's impoverished population. By working in our region, we're able to visit and monitor our programs and foster strong relationships with partners. Our efforts in the Asia-Pacific seek to offer micro-enterprise support, to keep children in high-quality schools, to offer support to children in the legal process and more.



EDUCATION



Our support of *Opportunity International* saw the introduction of education loans, school improvement loans and education quality programs in India.



In partnership with *Plan*, we have supported the education of sexual, reproductive, and maternal health for women living in Papua New Guinea.



Overall, we have given over **\$550,000** to education programs in the Asia-Pacific region.

ECONOMIC EMPOWERMENT



We have supported *Oxfam's* financial literacy and agricultural training and their support for women victim to domestic violence in Fiji.



We have funded micro-finance loans for women in India with *Opportunity International*.

So far, we have contributed over **\$760,000** to economic empowerment programs in the Asia-Pacific region.

We have supported Social Entrepreneurs in Bangladesh through the *Y-Gap Spark* program.





LAW & JUSTICE



Over \$360,000 of our funding has gone toward supporting Law and Justice in the Asia-Pacific region.



From 2016, our partnership with *Hagar* focuses on providing support to children in the Cambodian legal process. For example, the publication of educational “who will be in court books” in both Khmer and English to familiarise children with the details of their trials.

We have helped educate judges and courts in Cambodia to assist children to be more at ease when reporting abuse.

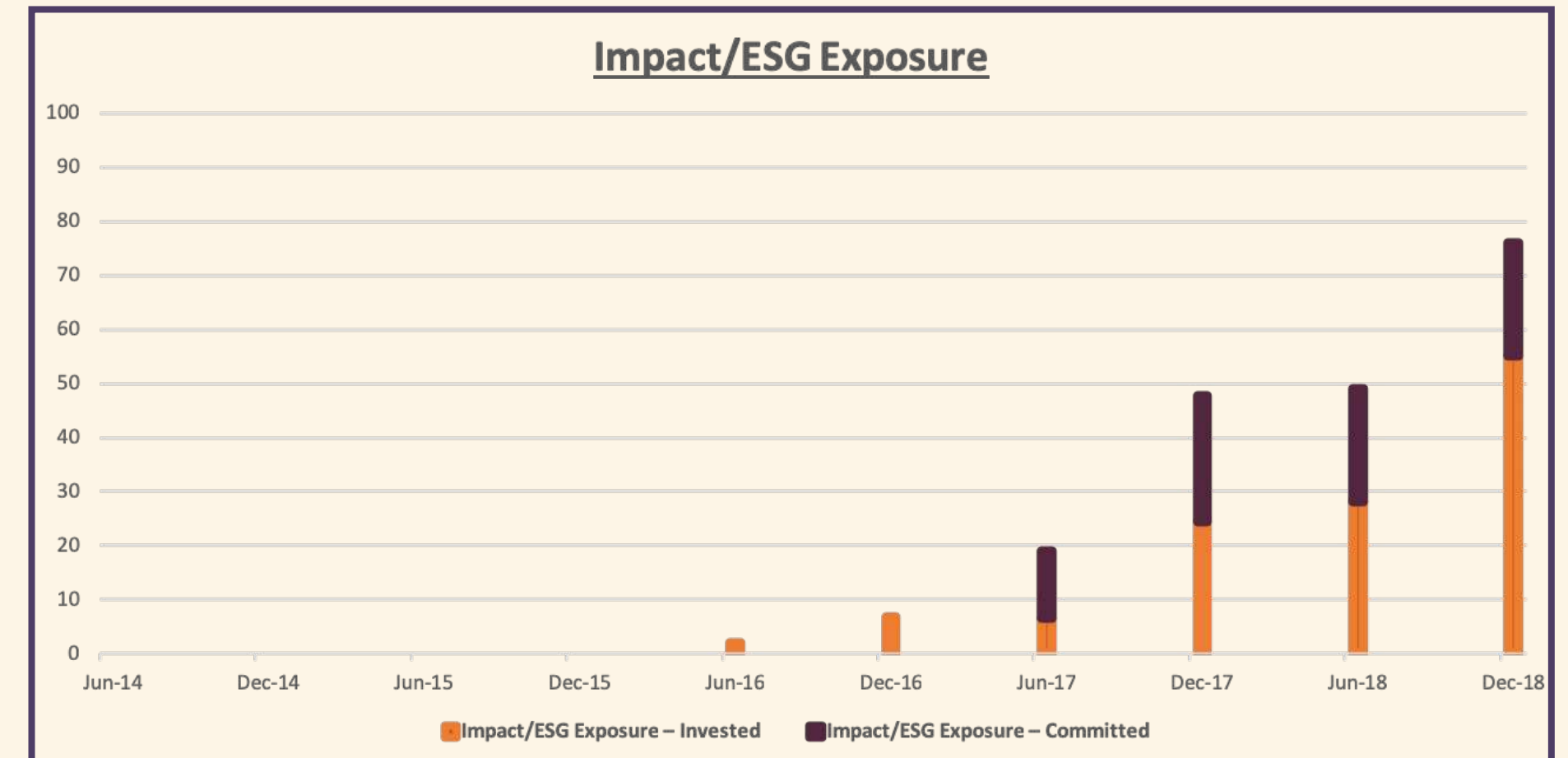


IMPACT INVESTING

Impact investing is the investment of capital with the goal of generating a positive social or environmental impact alongside a financial return.

In 2016, we made the decision to commit ourselves to the goal of 100% impact/ESG exposure, in order to leverage the overall power of our capital.

The Barlow Foundation's use of impact investing is crucial in answering our fundamental question; *how can we have the greatest possible impact?* By considering the outcomes of everything what we do, we ensure our impact on the world is only beneficial.



In 2014, the Barlow Foundation discovered the power of impact investing as a way to increase our impact, by June 2016 we had made our first impact investment, and in two and a half short years we went from 2% to 76% invested in ESG and impact.

NEXTGEN

Inherent in the values of our now multi-generational foundation is the involvement of the youngest members of our family of 16-25 year-olds. Our founders' altruistic desires to share our good fortune by helping others to achieve their own personal goals has been passed on to our *NextGen* group, whose role in giving is fundamental in ensuring the preservation of our core values into the future.

United by an interest in the potential positive impact of capital, particularly in the areas of education, gender equality and sustainability, the group promotes the importance of the younger perspective as we achieve our goal of being a progressive leader in the philanthropic field.

"Involvement with NextGen has facilitated the really exciting opportunity to learn more about how we can engage with today's pressing issues and contribute toward empowering people to improve as many lives as possible."

- Fergus McKenna
2018-19 NextGen
Chair



Offering one-on-one support to disadvantaged school kids in Victoria



Awarding scholarships to indigenous students to attend top schools.



Running tailored classes for indigenous girls to improve literacy.



Assisting minorities to integrate into the Geelong community.



Spreading the importance of women's education to empower young African girls.



Promoting health for kids in Indigenous communities.



Teaching sexual and reproductive health to girls in Africa.



One-on-one mentoring to help disadvantaged youth reach their potential.



Our Office

LOOKING FORWARD

We are very proud of our contribution in the philanthropic sector over the last five years. However, in order to operate at the vanguard of social impact, we recognise the need for continuous reflection and adaptation to the changes in our ever-growing field.

Therefore, in mid 2019, after a year long strategic review we are reinventing and re-launching.

Our revised strategy remains true to our vision of equality of opportunity. We will still be focusing on the education and economic empowerment of women and girls in the Asia-Pacific region, but increasing focus on our oldest and newest members of our community within Australia, that is Indigenous Australians and Asylum seekers/refugees.

We will utilise the UN Sustainable Development Goals as a means to measure our impact through both our grant giving and our impact investing.

We are no longer a traditional grant giver, but looking at all the ways we can have the greatest possible impact. We are activating all our available capital to invest in innovators and change-makers to achieve true equality. We want to capacity build organisations so that they can be in a stronger position to achieve their missions and we seek to invest in organisations that are tackling important issues to bring about social change.

We are now therefore an impact group and as we embark on our future we are thinking BIG.

'B.I.G.' (Barlow Impact Group)

ACKNOWLEDGEMENTS

THANK-YOU TO CONTENT CONTRIBUTORS

Barlow, Deborah; CEO

Blundell, Lisa; Board member

Colgan, Jade; *Cathy Freeman Foundation* (images)

De Almeida, Ursula; *Asylum Seekers Resource Centre* (images)

Dorrington, Rhyl; *Western Chances* (images)

Kennedy, Kate; Board member

McKenna, Fergus; 'NextGen'

McKenna, Martin; Board member

McKenna, Téa; Author

McMillan, Joe; *Stars* (images)

Neave, Greg; Board member

