



JFM Fund

INVESTING IN INCLUSION



Strategic Plan 2024-27

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Foreword by Mark Priadko

JFM Fund Board Chair



Our commitment to the genuine inclusion of people with disability in the lives of all communities is central to the development of our 2024-27 strategy. In late 2023 we asked members of the disability community what was important to them, and what barriers they experience in building a life of their choosing.

People with disability spoke to us about community attitudes and the negative perceptions of disability that exclude them from full and equal participation in all aspects of community life. This lived experience of the disability community is reflected in research studies on disability philanthropy. Only 4% of Australian philanthropic funds go to disability, despite people with disability representing 20% of the Australian population.^[1]

The research identifies social exclusion as the key driver of social and economic inequality, but of the limited philanthropy going to the sector, the majority of it is directed to welfare services and medical research, not to including people with disability in communities of their choice.

The research recommends philanthropic organisations:

- Involve people with disability in grant program design and decision making.
- Fund disability inclusion and advocacy.
- Support innovation, systemic and sustainable change.

[1] *The case for philanthropy in disability*, Achieve Foundation and Deloitte Access Economics, Feb 2023.

Alongside their stories of exclusion, people with disability also gave us examples of good practice which had effectively supported them to fully access and actively participate in communities of their choosing. As a funder, we want to further the innovation and practice of genuine inclusion. We have a history of funding work for disability inclusion, including research; advocacy; and developing, testing and scaling new initiatives.

This strategy builds on this experience by strengthening our commitment to:

- Supporting innovative approaches to inclusion.
- Deepening our own practice of including and centring the voices of people with disability through our grant making.
- Supporting people with disability to build their capacity to contribute to organisations through governance roles.
- Recognising our experience in this space positions us to influence the policy and practice of others, including other funders.

It's over 40 years since the JFM Fund was established by the will of Murdoch McLeod. We still have a long way to go in achieving equity and inclusion for people with disability. By funding new and evolving approaches to inclusion, and sharing our learning and experience, we hope to achieve lasting positive change for the disability community.

Mark Priadko
JFM Fund Board Chair

Who we are

The JFM Fund is part of a group of social purpose organisations, known as the Julia Farr group. We share a common set of values with our sibling organisations, JFA Purple Orange and inhousing. These are:

- People with disability are able to exercise personal authority (Personhood).
- People with disability are active citizens in the life of the community (Citizenhood).
- The capacity of people with disability is enhanced, at the level of the individual, and the family and the community (Capacity Building).

The JFM Fund provides funding to projects to develop, test and scale innovations and new models in disability inclusion, to grow personhood, citizenhood and capacity.

- **Our vision:** People with disability are living ordinary valued lives, characterised by rich personhood, active citizenhood, and personal growth.
- **Our mission:** To influence social policy and practice that advances the life chances of people with disability and their families. To sustainably distribute funds in ways that maximise social impact where people with disability are finding voice and taking up active membership in mainstream community life.

The JFM Fund was originally established by a bequest from Murdoch Stanley McLeod to the Julia Farr Centre. Murdoch McLeod purchased a regional South Australian bicycle shop in 1916, which he grew into a thriving motor parts business, with branches across South Australia and interstate, becoming the largest independent tyre distributor in Australia by the mid-1970s. The Julia Farr MS McLeod Benevolent Fund was established following Murdoch McLeod's death in 1981 and now operates as the JFM Fund.

Today, we are governed by a board of trustees that includes people with disability.

How we work

Our values drive our work and our grant making practice. We live our values by:

- Committing to inclusion: our grant programs focus on practising and increasing inclusion.
 - We will fund projects that seek to increase the genuine inclusion of people with disability in communities.
 - People with disability are involved in the design of our grant programs and in decisions on grant awards.
 - We will only fund organisations who already include people with disability in their governance and/or workforce.
 - Our grants program for individuals is only available to people with disability.
 - Our website and grant making processes are designed to be accessible.
- Engaging in collaboration and co-design:
 - Our priority areas for funding are determined through direct conversations with people with disability.
 - We seek opportunities to co-fund projects in collaboration with other funders.
- Showing respect, trust and equity:
 - We run open access grant programs – so anyone can apply for a grant, at any time of the year.
 - We provide accessible information on our grant programs, and encourage applicants to contact us directly, so you can better understand your eligibility and fit with our programs, and our grant making processes.
 - We engage independent assessors to review your grant application against a defined set of criteria.
 - Our board of trustees maintains a register of their interests, and trustees declare any conflicts of interest in relation to grant applications and funded grants.



- Showing support:
 - We provide pre-application information and support to potential applicants, to build understanding of the potential fit between your project idea and our funding program.
 - We recognise projects don't always go to plan. We'll work with grant holders to consider changes to projects, within the agreed purpose and value of the grant.
- Building relationships: we build supportive working relationships with applicants, grant holders and stakeholders in the disability community and philanthropy sector.
- Communicating and sharing: we share our learning, and the work of our funded projects, via our website, digital content and networks.
- Engaging in continuous improvement and learning: we're eager to learn from our – and others' – experience and to strengthen our grant making practice in response to feedback and lessons learned.

Strategic focus areas

Supporting people with disability to be genuinely included in all communities, as valued contributors to community life.

FUNDING

Innovation and inclusion

\$1m pa grant program funding policy, systemic advocacy and innovation for inclusion.

Inclusion Impact Fund to support a step-change in disability inclusion.

All grant holders include people with disability in governance or workforce.



AMPLIFY IMPACT

Leadership and influence

Leading by example:
Inclusive grant making practice.

Sharing stories, learning and methodology to influence policy and practice beyond direct grants.

Partnering with others.

Growing governance capacity in the disability community.

Delivered through

Annual grants

- Funding policy and systemic advocacy for inclusion.
- Grants to organisations and individuals for innovation in disability inclusion.

Initiatives

- New JFM Fund website and brand.
- Continuously advancing inclusion in our grant practice.
- Growing our philanthropic network.
- Joint funding with other philanthropic funders.
- Governance development program: initiating, scoping and planning.
- Inclusion Impact Fund, additional to our annual grants program, to deliver a significant advancement in disability inclusion.

Funding innovation and inclusion

We will fund work that develops, tests and grows innovations in disability inclusion, including policy and advocacy work that advances the opportunities for people with disability to be included as valued, contributing members of all forms of community. We will fund work that creates new models of inclusion, where people with disability take up valued, contributing roles in communities of their choice.

We will fund great, new and disruptive ideas, from start-up stage through to scale up, and the customisation of proven models to new contexts.

Success looks like:

1. Funded projects are able to demonstrate people with disability are more included in mainstream communities.
2. Funded projects are able to demonstrate they have influenced the policy or practice of other organisations towards greater inclusion.
3. Increased representation of people with disability in governance and workforce of applicant organisations.

We seek to achieve this by:

1. **Annual grants:** We will commit \$1m for grant funding per year for the three years of the strategy. This will be allocated to:
 - Policy and systemic advocacy for inclusion.
 - Grants for innovation in disability inclusion: grants will be available to organisations and individuals, via an open application process.
 - Partnership funding with other funders to add value to grant programs and funded initiatives, with a focus on innovation in disability inclusion.

2. The Inclusion Impact Fund: We will award a grant to support an initiative that demonstrates the potential to deliver a significant step change in disability inclusion. This will be a larger grant that is consistent with our strategy and additional to our annual grant program. This will be a one-off grant during the period of the strategy and, funds permitting, we expect to award up to \$2m.

3. Our funding criteria:

- All grants must demonstrate an innovative approach to disability inclusion, with the potential to influence the policy and/or practice of other organisations.
- For organisational grants, we will only fund organisations who already demonstrate they are including people with disability in valued, contributing roles in organisational governance and workforce.
- For grants to individuals, we will only fund people with disability.

Amplifying impact: Leadership and influence

We will amplify our impact by sharing our learning and partnering with others to influence the policy and practice of other agencies, and supporting people with disability to advance into governance roles.

Success looks like:

1. Our grant programs are designed, and our grant decisions made, by people with disability.
2. A growing body of resources demonstrating the centring of people with disability in our grant making processes, and in awarded grants.
3. Examples of influencing the policy and practice of others, including other grant makers, for greater disability inclusion.
4. People with disability develop their understanding, skills, experience and opportunities in governance roles, in agencies across all areas of community and economic activity.

We seek to achieve this by:

1. **Centering the voice of people with disability:** People with disability will have a core role in determining funding priorities, making grant decisions and sharing stories of learning and impact, through codesign; governance and operational roles; and as grant holders and participants in funded projects.
2. **Capturing and sharing our learning:**
 - Sharing learning, stories and resources from our grant holders via our website and digital channels.
 - Reflecting on our practice, our funding outcomes and our experiences of inclusion, in order to record our learning and impact, and share this via our website, digital channels and networks.

3. **Partnering with others:** Building our relationships with other funders, and committing up to \$200,000 per year to joint funding disability inclusion initiatives with other funders.
4. **Governance development program** that supports people with disability to develop their governance skills and experience, so they can enter into governance roles and progress their governance careers.



By funding new and evolving approaches to inclusion, and sharing our learning and experience, we hope to achieve lasting positive change for the disability community.





JFM Fund
104 Greenhill Road
Unley SA 5061
AUSTRALIA



Telephone: + 61 (8) 8373 8388



Email: grants@juliafarr.org.au



Website: www.jfmfund.org.au