



## WHEN IS ENOUGH, ENOUGH?

From an introduction to tithing in his early years to making million-dollar annual donations, Paul Wheelton AM is clearly aware of his purpose in life. *Lise Taylor reports.*

**P**aul Wheelton AM is the Founder of Wheelton Philanthropy and devotes most of his time to philanthropy. As a businessman running the Wheelton Group, he has 40 years' experience in the vehicle rental industry, and has diversified its operations into resort and general property ownership and management. He is also a charitable trust account holder with the Lord Mayor's Charitable Foundation.

*F&P* spoke with him about his philanthropy.

### Who introduced you to philanthropy?

My parents were very generous in spirit. They were 10-pound poms and valued education

so I was lucky enough to have been given a very good education. This, in itself, was an act of generosity in their desire to give me more than what they had received.

My father was a great role model for me. His interest in the lives of others and improving them was his driving mission. He had been successful in business, however by the time of his passing his wealth had been distributed.

Being a practising Anglican, I was also exposed at an early age to the spirit of giving and would listen with intrigue to where a portion of the weekly collection would be going and who it would help. This also introduced me to the concept of tithing.

### What shaped your early views on philanthropy?

Having had a 45-year plus involvement with Indonesia, I experienced first-hand how a small amount of money could make a difference. Starting with very small projects in villages, I would return a year later and see the rub-off effect that project had had on surrounding households. A typical example would be rebuilding a home for a widowed villager with children. Those around would see the improvement and start to put some pride into their own dwellings.

### Tell us about your philanthropic work.

Our work centres around core pillars of education and health with an emphasis on children and women.

I learned early on in our journey that the difference between underdeveloped nations and those moving to developing and developed status was the opportunity given to women. This particularly applied in the education space where in all underdeveloped countries the male will be given preference in the areas of education and employment.

We typically give away \$1 million to \$1.5 million per year, and prefer to be a big fish in a small pond when we look at our projects. We also like to see what specific effect our support will give – being one of many contributing to larger causes has not really been attractive to me. Rebuilding some orphanages or a community centre in remote Bali has been inspirational in our work. Seeing results that have an immediate effect helps. You can build a whole new orphanage there in six months. In Australia, it is a minimum four-year timeframe.

We have also found enjoyment in being an initial funder in a capital project. For example, as the Capital Campaign Chair for Guide Dogs Victoria's \$18 million facility rebuild, it was important for me to show I had skin in the game by putting in \$500,000 as a start. I did not want to be asking others for donations when I wasn't committed myself.

Our approach is reactive, which is mainly due to scarceness of resources in terms of funds available, so we have no time available to look forward. In addition, we must have some emotional connection to the cause. Obviously, we get numerous requests and many in detail. I always wonder about the

charities that put so much time into a request for funding when there is no emotional connection between us. It doesn't matter how much they spend on their submission and how logical it is, if we don't have a connection it goes straight to the bin.

### Do you engage with charities in other ways?

I spend a lot of my time giving advice to different charities especially around board make-up and cross charity collaboration. I have a strong view we have too many charities and there can be a lot to be gained by collaboration and combining of administrative functions.

### Do you evaluate the impact of your gifts?

Choosing to be the big fish in the small pond allows us to see first-hand results. This area is, however, a weakness and we could be much more diligent in our approach.

I have been watching closely the likes of the Lord Mayor's Charitable Foundation and Gandel Philanthropy in their approaches to collaborate giving and project evaluation. Knowing the CEOs of both organisations quite well has provided me with a great mentoring experience.

### How could charities do better in engaging major donors?

Having been involved in the nonprofit sector over many years I am amazed at how poorly the sector looks after its donors. 'Get the money and run to look for the next donor' seems to be the norm, unfortunately. Also, the relationship between donor and charity is often kept at CEO/relationship manager to donor level – not organisation to donor. When there is a change of CEO/relationship manager, the relationship is lost.

### How important is it for a charity's CEO and board members to be involved in nurturing and engaging major donors?

It is essential for the CEO to be involved as it is for the board. My experience has been that as a charity grows and the donor relationship moves away from the CEO there seems to be a view of, "That is one more thing I don't have to worry about."

The board should be a major conduit for major donors. Its members are an essential part of maintaining significant donors and should also be major donors when possible.

### What have you learned about yourself since getting involved in philanthropy?

One of the important lessons I have learned is the need to ask yourself, *When is enough, enough?* Having been successful in business, I could have gone on giving all my energy to wealth creation. I believe in the living will and have a desire to be making the difference now. Providing housing for my children at the start of their working life made more sense to me than letting them struggle early and get a big payout when I eventually pass. That view has also meant there is little opposition to my approach to giving from the family. **F&P**



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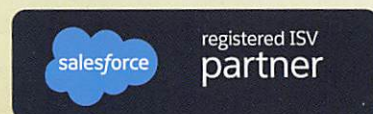
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