

philanthropy

Newsletter of the Australian Association of Philanthropy Inc.
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CONFERENCE ISSUE

Cover Story: THE GODMOTHERS,
Interview with Pat Feilman and Meriel Wilmot



Contents

PHILANTHROPY is the official newsletter of The Australian Association of Philanthropy. Published four times annually, it is mailed to all members of the Association and other selected individuals and organisations and is also available on request.

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Conference Organiser Anne Frost (left); Michael Liffman, Executive Officer, The Myer Foundation and Marion Webster, Executive Director of the Australian Association of Philanthropy.

Cover Note

Our cover photograph and those accompanying The Godmothers article were taken by Melbourne photographer Dale Mann.

Educated at Monash and La Trobe Universities, where he read geomorphology and history, one of his main photographic interests is politics.

A photojournalist, Dale established his agency, Retrospect, in 1984. He has since worked for Time International, Life Magazine, Australian Society, BRW, the Bulletin, among others.

His current major photographic project involves pregnancy, babies and the early stages of a child's life.

Editorial News

President's Christmas Message.....	1
Conference Editorial	1
Editor's Message	1

Philanthropy News

And Then What Happened?.....	2
AGM Notice	3
Lunchtime Discussion Group	3
The Council on Foundations Conference	3
Joint Venture for Philanthropy?	3
New Members.....	4
Photographic First for Small Change	4
A Cautionary Tale?	4

Report

International Symposium.....	5
Marion Webster	
Conference Agenda	7

Cover Story

The Godmothers	9
Jane Sandilands	

Report

Conference Report

Conference Objectives.....	13
An Historic Occasion.....	14
Day One: A Hive of Conference Activity	14
Day Two: Listening, Reviewing and Looking Ahead.....	17
Conference Evaluation Forms	20
Conference Speakers	20



Julian Disney, Director, Welfare Rights Centre, Sydney (centre); with Bill Hare from Australian Conservation Foundation (left); and Tim Jacobs, Ministry for the Arts (right).

President's Christmas Message

What has happened to 1989?

I am sure that is the thought of most of us in that it has been a very busy year for philanthropy and especially philanthropic trusts.

But 1989 has been a very productive year for our Association.

1. Our Conference, cohosted with the Myer Foundation, was a success and voted such by the attendees. There were several important questions raised and we shall address these through group luncheon discussions in 1990.

2. Our projects:

a. The Corporate Philanthropy is moving along very well and it is hoped to link in with the Business Council.

b. The private foundation project in conjunction with Stegley Foundation is formulating a kit to assist anyone wanting to set up a private foundation.

c. The Giving in Australia is proceeding various stages and even the information gained so far is extremely interesting and as it progresses it should be even more so.

The Secretariat under Marion Webster's direction has consolidated and is proving its worth in so many ways.

May I wish each and every member and their families the true joy and peace of the Christmas Season and may 1990 see us continue in our movement towards a better world for all of us.

Vincent Kiss
Chairman

Conference Editorial

This issue of PHILANTHROPY acknowledges not only the emerging role of the philanthropic sector, but more particularly, the growth of the Association from its voluntary origins in the mid 1870's to the permanent secretariat of today.

After nearly two years of its operation, the Association believes it most appropriate that this Conference issue pays tribute to the vision of both Meriel Wilmot and Pat Feilman. Their energy and dedication over many years has undoubtedly paved the way for the

development of the Association, its ability to stage the first national conference on philanthropy and its role into the future.

The issues raised by the Conference are not new. However, for the first time they have been brought publicly into focus in a forum of over one hundred national participants.

Legal and taxation law as it affects our sector, our future role with the corporate sector and our relationship with the grantseekers are all issues which must be tackled if the philanthropic community and the Association are to play an important and effective role in the melting pot of issues facing us over the next few years.

Marion Webster
Executive Director

Editor's Message

This is a bumper issue of PHILANTHROPY. As well as its coverage of the Conference, it features interviews with Pat Feilman and Meriel Wilmot, who have truly been the godmothers to this association. They first met in the early 1960's, when Sir Ian Potter and Mr.

Kenneth Myer were involved in a project to gather funds to build the Howard Florey Institute at the University of Melbourne.

Realising the benefits of a forum for the philanthropic sector, they organised the holding of two conferences, one in 1972, primarily to discuss the changes to the social structure being made by the Whitlam Government. The next conference, held in 1974, was the direct forerunner to the founding of the Association in 1975.

Association members may have noticed the interest generated about philanthropy in the media. Father Vince Kiss was interviewed on ABC Radio about the Conference and articles have appeared in The Sunday Age and the Financial Review. Graeme Johnstone, ("A Place in the Sun") mentioned the conference on its opening day.

"Philanthropy," he said. "Now there is a beautiful word. It rolls off the tongue. It has a beautiful meaning, too. It means to love all humanity, to provide practical benevolence. To dip into the kick and get things going..."

This issue is in in that spirit, showing philanthropy at work in Australia.

Jane Sandilands



*From Images of Youth Calendar.
Photograph by Marcus Bunyan, Brighton Technical School.*

Philanthropy News

And then what happened?

The granting of funds is often only the first step in a project, leading to sometimes unexpected, usually unplanned outcomes. PHILANTHROPY would like to hear about projects which, following funding, have taken on a life of their own.

"TINKERING WITH THE HERITAGE MODEL TO KEEP IT ON THE ROAD" ...Marjorie Oke

The Northcote Hydrotherapy and Massage Self Help Group swims in Melbourne's City Baths. When photographer Jan McDonald (at the Baths for a swim herself) saw them, her initial reaction was that they were "defying the normal image of older women".

The result of this chance meeting is a series of photographs to be published as a book, which will include anecdotes from the group.

Now recognised as a model for other groups in the use of hydrotherapy and massage, they were included in a recent film documentary made by the Commonwealth Health Department.

At the October Conference, a member told us "before being involved in this, I knew the name of everybody on TV, but nobody in my street!" Not so today.

Group contact: Marjorie Oke (03) 489 6757.

Photographer: Jan McDonald (03) 328 3357.

Initial Funding: Victorian Women's Trust

FINDING INSPIRATION IN THE WESTERN DISTRICT

The Potter Demonstration Farms have created enormous interest both in Australia and overseas, attracting four thousand visitors since their beginning in 1984. With the ever increasing interest in land care, a need has developed for tours of the farms to be co-ordinated.

Now, with funding from Greening Australia, Hamilton farmer and tour organiser Sue Marriott has been appointed co-ordinator for visits to the Potter Farms.

Experienced in organising specialised itineraries to the Hamilton district, she said that several tours have already been run successfully. Sometimes just one person takes a tour, such as Melbourne woman Jane Reid, well known as the Jane behind 'Jane's Succulent Sausages' and then Cafe Sweethearts in South Melbourne. With a family property of seven thousand



"In the water we can learn to swim, play games, dance, laugh. All wonderful medicine." Helen Lewis, 89. Photographer: Jan McDonald.



*From Images of Youth Calendar.
Photograph by Heather Campbell, Wanganui Park High School.*

acres at Tooma, New South Wales (closest centre Corryong) she intends to put the Whole Farm Plan into effect. The farm, on the Upper Murray, is heavily cleared and there is already some tree planting under way. Since visiting two of the Potter farms, she has already arranged for aerial photos of the property to start "making it happen". Her next step is to make sure her "progressive farm manager" and her brother see the Potter farms. "I want the visit to inspire them in the way I was inspired," she said.

For group tours, a number of people organise to travel together, such as the farmers from Mittagong who hired a bus and stayed in shearers' quarters, or the American environmental science students based in Cairns, here to study land care in Australia.

The Potter Farms have been "written into" courses at Marcus Oldham College, making them a subject for study by students attending the College. Sue Marriott believes the project has enormous potential as it caters to specific needs: "Every visit caters to the particular interests of each visitor," she said. "And as well they have interaction with the farmers involved in the project."

Tours are run under the banner of H.E.A.L. (Hamilton Environment Awareness Learning).

Contact Person: Sue Marriott. Ph: (055) 786223

Initial funding: The Ian Potter Foundation.

General Notices

ANNUAL GENERAL MEETING ADVANCE NOTICE

Date: 20th March, 1990

Venue: John Landy Room, Melbourne Cricket Ground

LUNCHTIME DISCUSSION GROUPS

Yoshiko Wakayama of The Toyota Foundation, Japan, is our final speaker for the year. A report will be in our next edition.

THE COUNCIL ON FOUNDATIONS CONFERENCE

The Council on Foundations 41st Annual Conference will be held from April 2 - 4, 1990 in Boston, Massachusetts. The theme is "The Struggle for Community" and a preliminary agenda will be available in January, 1990. Further information from the Council on Foundations, 1828 L Street, NW Washington, DC 20036.5168.

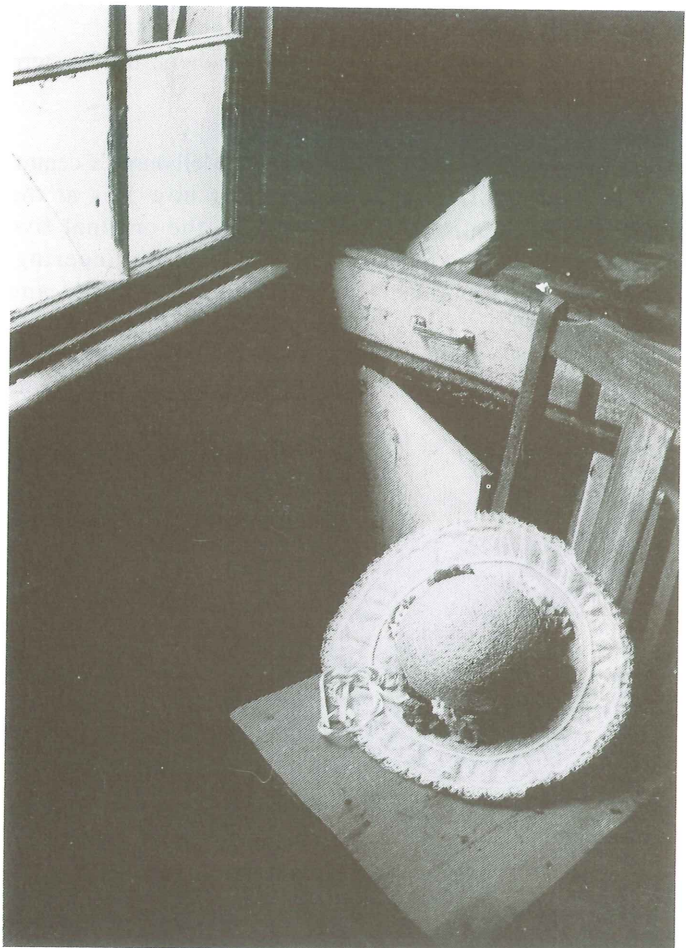
Ph. (202) 466.6512. Fax 202 785.3926.

JOINT VENTURE FOR PHILANTHROPY?

The last edition of PHILANTHROPY included a report on the International Conference on the Ozone Layer and Health sponsored by the Menzies Foundation in May this year. The Conference found that the position was more serious than expected since, in December 1987/January 1988, there had been a 20% increase in ultraviolet radiation over Melbourne. Several scientists suggested that this phenomenon was likely to recur each two years with the next in December 1989/January 1990. Increased exposure to ultraviolet radiation of course carries consequent increased risk of skin cancer.

Following the Conference, the Foundation took the recommendations to Federal Government. One major recommendation (the creation of a national network to monitor ultraviolet radiation at the surface) has already been taken up by the Bureau of Meteorology in its role as the appropriate statutory authority. Ways and means of implementation were discussed at a two-day meeting in November.

In other areas it is not so easy for Government to make a speedy response since the necessary participants are the Departments of Health (medical scientists); Science (physicists and atmospheric researchers); and Environment (ozone depletion). Consequently, the Foundation is still awaiting a response to the other recommendations and, in the interim, preliminary measurements in October this year strongly supported the suggestion of extensive ozone



*From Images of Youth Calendar.
Photograph by Sarah Carr, Wanganui Park High School.*

depletion in December 1989/January 1990. The threat to the health of Australians increases.

Also in the last edition of PHILANTHROPY, Ms Robin Reiter suggested that it was more important than ever that foundations "develop coalitions to ensure maximum opportunities for intelligent spending".

Taken together, these two contributions suggest an opportunity for a joint venture in the area of environmental health for Members of the Australian Association of Philanthropy. Briefly, the suggestion is the creation of two or three AAP Fellowships for the triennium 1990-1992 working at a scientific research centre on certain health consequences of ozone depletion. There is no commitment after that time.

The AAP Fellows would be expected to carry out innovative research in their field and to report their findings in the normal way through publication in scientific journals and also to take part in relevant Conferences.

The cost of each Fellowship will depend on the research topic but a figure of \$60-100,000 per annum is a guide. To explore this suggestion, the Menzies Foundation is hosting a half-day meeting on the afternoon of Monday, December 18th and warmly invites interested Members of the AAP to attend. Further details are available from the Foundation on (03) 419 5699.

**Dr Eric Wigglesworth
Executive Director
The Menzies Foundation.**

NEW MEMBERS

The Association welcomes two new members: the Western Institute and Monash University.

Monash University

Established in 1960, 20km southeast of Melbourne's central business district, Monash University now lies at the demographic centre of Melbourne. To the original five faculties: Arts, Economics and Politics, Engineering, Medicine and Science - were added Law (1964) and Education (1965).

The University's academic endeavours are now characterised by a multi-disciplinary approach through centres of learning

and research. These include the National Centre for Australian Studies, the Centre for European Studies, the Centre for Southeast Asian Studies, and the Centre for Early Human development. Others are the Centre for Molecular Biology and Medicine, The Krongold Centre, the Centre for Human Bioethics, and the Centre for Migrant and Intercultural Studies. In 1990, the University implements joint arrangements with Chisholm Institute of Technology and the Gippsland Institute for Advanced Education.

Note: There will be a profile of Western Institute in our next issue.



*From Images of Youth Calendar.
Photograph by Christopher Howlett, Brighton Technical School.*

A PHOTOGRAPHIC FIRST FOR SMALL CHANGE

Established to support state schools in Victoria, one of Small Change's first projects was the Images of Youth Calendar, put together from work submitted by young photographers all over Victoria.

The Executive Officer of the Foundation, Margaret McCaffrey, said the response to the calendar has been overwhelming. Proceeds from its sales will support the future work of Small Change.

The Images of Youth Calendar is on sale at bookshops (including the ABC bookshop) for \$12.00.

Enquiries: Margaret McCaffrey (03) 650 4277.

A CAUTIONARY TALE?

"'Money is a feeble offering without the study behind it which will make its expenditure effective.' This is a sentence which Mr. Rockefeller wrote nearly fifty years ago, after a lifetime of experience in what he called 'the difficult art of giving'. The sentence is profoundly true, in relation both to individuals and institutions. Dr. Henry S. Pritchett of the Carnegie Foundation expressed the idea in even more vigorous terms: 'Somebody must sweat blood with gift money, if its effect is not to do more harm than good.'"

From The Story of the Rockefeller Foundation by Raymond Fosdick (p. 292, Harper & Bros, New York, 1952).



*From Images of Youth Calendar.
Photograph by June Orford, Brighton Technical School.*

International Symposium

Organized Private Philanthropy in East and Southeast Asia, Bangkok.

August 7th-9th, 1989. Sponsored by the East Asian Institute, Columbia University

BACKGROUND

The symposium was funded by the Ford Foundation, Rockefeller Brothers Fund and the Rockefeller Fund. It included 35 participants representing seven countries in the region, Japan, Korea, Taiwan, Philippines, Thailand, Indonesia and Singapore. These countries had all participated in a collaborative study of the emergence and prospective role of organized private philanthropy in their countries. The symposium was organized around the presentation of these research findings. 15 authors prepared papers for the symposium.

Australia, the Ford Foundation and the Rockefeller Brothers Fund attended as observers, but participated in the panel on the final day. The panel consisted of:

T.K. Adhyatman, The Adam Malik Foundation, Indonesia
David Arnold, Ford Foundation, New York
Ernesto Garilao, Philippine Business for Social Progress, Manila

Russell Phillips, Rockefeller Brothers Fund, New York
Yoshiko Wakayama, Toyota Foundation, Tokyo
Marion Webster, The Australian Association of Philanthropy

The aims of the symposium were twofold:

1. to explore the emergence and role of private Asian philanthropy within the rapidly changing economic, social and political context of East and Southeast Asia; and
2. to encourage the growth and professionalization of private philanthropy in East and Southeast Asia by exploring possible modes of collaboration within the region and between interested American, Australian and Asian foundations.

The symposium focused mainly on grantmaking foundations and other organizations which provide administrative, technical and other support to them, such as the Japan Centre for International Exchange, the Philippine Business Council for Social Progress and The Australian Association of Philanthropy.

The symposium went a long way towards achieving its aims.

THE STUDY

The research findings presented by each of the seven countries outlined:

- the nature of traditional philanthropy and its practices in each country;
- the impact of those practices on the rapid economic and social change that is taking place in the region;
- the structure of new wealth and perceptions of economic insecurity;
- government-business relationships;
- decision making within corporate foundations;
- the regulatory context of charitable giving; and
- government-NGO relationships.

FINDINGS OF THE STUDY

Despite the traditionally held view that organized philanthropy is a Western concept, it was clearly established that there are strong historic traditions of philanthropy in all the countries participating in the study.

While these all had different historic origins, most are clearly based on either religious or cultural traditions.

These traditions of philanthropy have all been greatly affected by the extensive economic social and political changes that have taken place in the region over the past three decades, including increased social and political pluralism and the emergence of larger middle classes and economic elites.

Such changes have led to intensifying debates about the social responsibility of these emerging groups towards the less advantaged and of the role of non government organizations in addressing social issues.

These shifts are seen also to have implications for the relationship between private citizens and the state and thus for the potential growth, role and influence of private philanthropy. In addition, there has been an increase in the activity of internationally oriented Asian corporations and a rapid increase in the number of corporate foundations.

It was evident however that, with the exception of the Japanese, most of the countries represented feel insecure about their new economic status. This insecurity, they believe, does have negative implications for the growth of philanthropy as it was seen that philanthropy is best encouraged in a stable economic environment.

It emerged from all the papers that the nature of government-business relationships has enormous implications for philanthropy. The level of government involvement or guidance of the private sector can influence the nature particularly of corporate philanthropy, either through taxation or through 'quasi taxes'. In Japan, for example, the taxation law makes no distinction between corporate contributions to political parties or government sponsored projects and donations to philanthropic causes. In 1986, an election year, 67% of corporate donations went primarily to political parties or individual politicians.

In both Taiwan and Korea economic development has taken place under close government guidance which has included numerous instances of government-initiated 'philanthropy' in which corporations donated funds to government-designated activities.

Similar instances of 'quasi taxes' imposed by government or national leaders can be seen in Southeast Asia as well.

There was a great deal of variation between countries regarding the regulatory context in which foundations in the

region operate. In some countries such as Singapore, the government allows generous tax deductions for contributions to government approved organizations whereas there are no tax deductions for charitable donations in Indonesia.

Most countries indicated that corporate foundations, rather than private, family foundations, formed the bulk of philanthropic giving.

Corporate foundations in East and Southeast Asia are frequently managed as part of the parent corporation's operations, seldom have independent policy-making authority and are usually staffed by corporate employees assigned to manage the foundation for relatively short periods of time, often just prior to retirement.

The role of philanthropy is further influenced by the relationship between government and non government organizations. The extent to which governments wish to exercise control over the activities of non government organizations and the extent to which foundations are influenced by this become important issues.

CONCLUSIONS FROM THE PRESENTATION OF PAPERS

The major themes that continually came up during the presentation of the papers were the lack of infrastructure in philanthropy in this region and the diversity of starting points.

Specifically, these included:

- The general lack of professionalism in all aspects of philanthropic work.
- The lack of training opportunities within the region.
- The lack of a sense of community both within countries and internationally in East and Southeast Asia.
- The lack of formal structures to support philanthropic work within countries.
- The dominance of corporate over private philanthropy. All countries, with the exception of Singapore, had much higher levels of corporate giving.
- The difficulty of bringing corporations into any philanthropic network. Despite extensive efforts in most countries, no corporate foundations were represented at the symposium.
- The variety of regulatory procedures within each country.
- The difficulty most countries experienced trying to attract foreign money to support non government sector activities.
- The lack of international funding. Japan was the only country which identified any real capacity to support international projects. In spite of this capacity however, it was clear that Japan was not highly regarded in the region as a result of its economic dominance and failure to look sensitively to the needs of the region.
- The heavy weighting of funding in most countries towards educational scholarships in the sciences and technology probably at the expense of social change and social policy needs. In these countries, philanthropic organizations tended to adopt a traditional model of charity, seeing it simply as the relief of poverty.
- The greater emphasis by philanthropic organizations on the encouragement of pluralism within some countries such as

Taiwan and Thailand. These organizations encouraged diversity of approaches and a greater commitment to social policy development.

- The more stable the political and economic structure in a country, the higher the level of philanthropic spending appeared to be.

OUTCOMES OF THE SYMPOSIUM

Despite the diversity between the countries present, there was the view that we must not be immobilized by this but take account of it when looking to the future.

This diversity led to a plea from most countries to move slowly with any co-operative planning for the future, building on the common elements and needs across the group.

There was a strong commitment to continue to develop 'innovative, creative linkages' between countries in the region. The symposium was seen as the first and most important step. It was considered important to keep the constituency quite small at this stage of development, limiting the group to its present size. The development of these linkages was seen as particularly important for the future, given the greater role countries like Japan are going to play in the region. This will lead to greater interdependence at all levels of society, and potentially for a greater international role for philanthropy.

In addition, it was agreed that there are an increasing number of global issues, such as the environment and AIDS that we are all facing and should be working on collaboratively.

The growing role of Asian corporations in the international context was also seen as an important reason to maintain and develop linkages in the region.

Above all, it was agreed that the main reason to continue and develop a network was the shared commitment to private philanthropy.

Four levels were identified at which co-operation could occur. These were:

1. The micro level which would involve helping NGOs in their individual countries build and strengthen their fundraising capacities.
2. Establishment of an intermediary organization to aggregate small sums for distribution similar to community foundations in the US.
3. Encourage the development of umbrella associations, such as in the US and Australia. These would provide a convening, networking and information sharing role.
4. Development of an Asia Pacific philanthropic network. This would not necessarily be a formal or structured body, given the desire to move slowly.

Specifically, it was decided that the group would attempt to organize a further conference in a year's time, possibly in the Philippines.

In order to facilitate this, it was agreed a representative from the Philippines and Dr. Barnett Baron (the conference organizer) would appoint a steering committee to:

- clarify the aims of a future conference
- develop some strategies to encourage corporate involvement

- organize the mechanics of the conference

Australia indicated its readiness to be involved in any ongoing work.

IMPLICATIONS FOR PHILANTHROPY IN AUSTRALIA

The outcomes of the symposium have a number of implications for philanthropy in Australia, both at a regional (Asia/Pacific) level and at a broader international level.

Specifically, the symposium provides us with the opportunity to:

- become part of a loose regional network of people and organizations working in philanthropy in the Asia/Pacific region;
- develop a better understanding of regional needs in the various philanthropic sectors and non government organizations;
- provide some resources and assistance to those wishing to establish umbrella associations within countries in the region
- participate in other relevant regional activities;
- further develop our international networks and linkages with relevant bodies in the US; and
- explore opportunities for greater involvement with

international organizations such as Interphil, the network for philanthropic sector.

IMPLICATIONS FOR AAP

The symposium was the first real opportunity for the Association to present itself in an international forum.

Both formally, during the panel session, on the final day, and informally throughout the course of the symposium, the work of the AAP was discussed, as were issues surrounding its establishment, progress to date and plans for the future.

While we were able to provide valuable input to some of the countries wishing to establish an association, there was much opportunity for learning particularly from representatives of the Ford Foundation and the Rockefeller Brothers Fund. They showed great enthusiasm for the work of AAP, provided very useful feedback and suggestions for future work.

As a result, AAP is now part of the international philanthropic network, with some strong and very useful linkages, plus the opportunity to develop these further.

Marion Webster
Executive Director

Conference Agenda

Conference on Independent Funding in the Community Sector

DAY ONE

Sessions on Independently Funded Projects: Wednesday October 18, 1989

9:30 - 11:00 am

Societal and Organisational Development

- Management Support & Training Unit, Victorian Council of Social Service
- The Disability Resources Centre
- Ross House

Chair: Genevieve Timmons, Executive Officer, The Lance Reichstein Charitable Foundation.

Location: No 3 Lecture Theatre

Science and Technology

- Community Technology
- The Science Shop

Chair: Nevil Jackson, Administrator, R.E. Ross Trust

Location: Hall-side

Housing and Accommodation

- The Caravan Park Residents

Network

- WESTRAID: Western Region Accommodation for People with an Intellectual Disability
- Chair: Marg McCaffrey, Executive Officer, The Small Change Foundation
- Location: Hall-back

Personal Services

- The Victorian Foundation for Survivors of Torture
 - The Family Centre Program, Copelen Street Family Services
- Chair: Loula Rodopoulos, Honorary Director, The Victorian Women's Trust
- Location: No 2 Lecture Theatre

11:30 - 1:00 pm

Societal and Organisational Development

- Management Support and Training Unit, Victorian Council of Social Service
- The Disability Resources Centre
- Ross House

Chair: Genevieve Timmons, Executive

Officer, The Lance Reichstein Charitable Foundation

Location: No 3 Lecture Theatre

Health

- The Health Issues Centre
- The Northcote Hydrotherapy and Massage Self Help Group
- The Well Women's Community

Health Project

Chair: Lisa Trood, Community Development Officer, Victorian Health Promotion Foundation

Location: No 2 Lecture Theatre

Communication and Information

- The Mallee Information and Resource Centre
- The Aboriginal Women's Radio Training Project

Chair: Marg Leser, The Stegley Foundation

Location: Hall-back

Law and Justice

- Communications Law Centre (NSW)
- The Public Interest Advocacy Centre (NSW)

- The Mental Health Legal Centre
Chair: Mark Herron, Executive Officer,
Victoria Law Foundation
Location: Hall-side

2:00 - 3:15 pm

Conservation, Environment and Heritage

- The Ozone Project, Australian Conservation Foundation
- Development Studies for the Museum of Victoria and the State Library

Chair: Steve Mathews, Equasearch
Location: Hall-back

Employment

- Macaulay Community Enterprise Network
- Harrison Youth Services
- Koories and Work

Chair: Marg Leser, The Stegley Foundation
Location: No 2 Lecture Theatre

Cultural Development and the Arts

- The Restoration of the Memorial Theatre, Ballarat
- Brunswick Recordings

Chair: Marg McCaffrey, Executive Officer, The Small Change Foundation
Location: No 3 Lecture Theatre

Law and Justice

- Communications Law Centre (NSW)
- The Public Interest Advocacy Centre (NSW)
- The Mental Health Legal Centre

Chair: Mark Herron, Executive Officer, Victoria Law Foundation
Location: Hall-side

3:45 - 5:00 pm

Conservation, Environment and Heritage

- The Ozone Project, Australian Conservation Foundation
- Development Studies for the Museum of Victoria and the State Library

Chair: Steve Mathews, Equasearch
Location: Hall-back

Employment

- Macaulay Community Enterprise Network
- Harrison Youth Services
- Koories and Work

Chair: Marg Leser, The Stegley Foundation
Location: No 3 Lecture Theatre

Education and Training

- Sound House

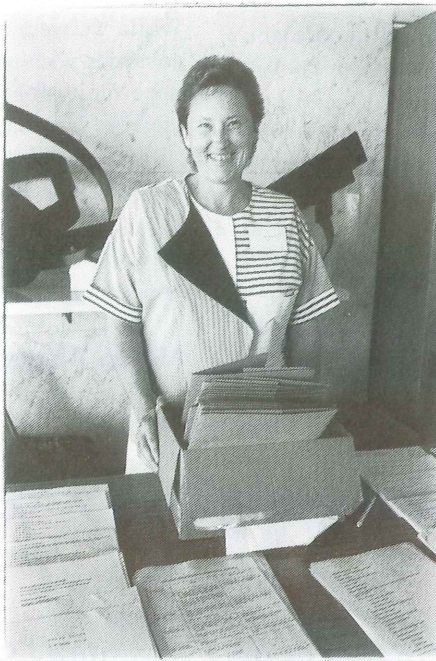
- The Images of Youth Calendar Project

Chair: Loula Rodopoulos, Honorary Director, The Victorian Women's Trust
Location: No 2 Lecture Theatre

Finance and Income Security

- The Social Security Enquiry System
- Policy Paper on Supporting Sole Parents

Chair: Robin Hunt, Chairman, The Sunshine Foundation
Location: Hall-side



*Iris Mason, Assistant/Secretary,
Australian Association of Philanthropy
All conference photos by Dale Mann.*

DAY TWO

Thursday October 19, 1989

9:00 - 9:15 am

The Broad Context

Philip Norman, Chairman,
The Howard Norman Trust

Session One

Patterns of Funding in the Community Sector

Chair: Michael Liffman, Executive Officer, The Myer Foundation
Addresses:
Human Services: Julian Disney, Director, Welfare Rights Centre, Sydney, NSW; Member, The Economic Planning Advisory Council.
The Arts: Tim Jacobs, Deputy Director, Victorian Ministry for the Arts.
The Environment: Director, Australian Conservation Foundation.

Session Two

The Legal and Financial Context

Chair: Darvell Hutchinson, Chairman of Trustees, Helen M. Schutt Trust
Addresses:
Taxation Issues: Rick Krever, Senior Lecturer in Taxation Law, Monash University.
The Report on the Law Relating to Charitable Trusts by the Legal and Constitutional Committee of the Victorian Parliament: Elizabeth Proust, Secretary, Attorney-General's Department, Victoria.
Investment Management: Denis Tricks, Chairman, The Hugh Williamson Foundation.

Session Three

The Mechanics of Independent Funding

Chair: Jill Reichstein, Chairman, The Lance Reichstein Charitable Foundation
Addresses:
The Grant Seeker Perspective: Rob Hudson, Executive Director, Victorian Council of Social Services.
The Executive Officer Perspective: John Sullivan, Charitable Trusts Officer, Perpetual Executors and Trustees Association of Australia Ltd; Genevieve Timmons, Executive Officer, The Lance Reichstein Charitable Foundation.
The Trustee Perspective: Martin Carlson, Trustee, The Brash Foundation and the Hugh Williamson Foundation.
Accountability: Sarah Stegley, Trustee, The Stegley Foundation; Terence Purcell, LL.B, Director, Law Foundation of New South Wales.

Session Four

Discussion, Summing Up and Issues for Follow up

Chair: Marion Webster, Executive Director, Australian Association of Philanthropy
Speaker: Hayden Raysmith, Chairman, Board of Directors, Australian Society.

Close

Father Vincent Kiss, President, Australian Association of Philanthropy.

The Godmothers



The strength of any association relies not only on those directly involved on a day-to-day basis but also on those who can be relied on for support 'behind the scenes'.

The two people most instrumental in the setting up of The Australian Association of Philanthropy were Meriel Wilmot and Pat Feilman. Their interest in its progress is maintained today.

Together, they contribute a wealth of knowledge and experience about philanthropy in Australia.

Pat Feilman has been Executive Officer of The Ian Potter Foundation for more than 25 years. Her interests cover a wide field, including being a member of the Zoological Board of Victoria, the Victorian Conservation Trust, the State Film Centre Council and The Tobacco Leaf Marketing Board.

She spoke in Melbourne to PHILANTHROPY Editor, Jane Sandilands.

How would you describe the state of philanthropy in Australia?

Philanthropy is a difficult idea to sell to people to get them interested. This country has a fairly poor track record in terms of private philanthropy, given the huge wealth that's been accumulated in the last twenty years. I find it very disappointing that there's been so few people that have come forward to set up private trusts, particularly given the tax benefits that can accrue to people.

Why do you think this is so?

It's difficult to say. I suppose we don't have the same sort of culture they had in the early part of the century in the United States where the tremendous blossoming of philanthropy took place. Perhaps there aren't the same needs for it - that's the other point. We think we have a lot of needs but we're a pretty affluent society really and the welfare system does give a fair bit, so I suppose it's a question of perceived needs.

You didn't have the large corporations working in the education field that are around now.

"Philanthropy is a difficult idea to sell to people to get them interested."

Is there more interest in corporate philanthropy now?

The corporate sector certainly has in the last ten years become much more aware of its role, moving into sport, into the very obvious sections of the arts. I see that as a mixture of philanthropy and sponsorship.

What was the motivation for the Potter Foundation to become involved in the Farmland Project?

I guess in a way, I was the motivator of it. I've always had a strong feel for the environment for a variety of personal and family reasons. One started to see, at a fairly dramatic level,

particularly through television documentaries and so forth what was happening. It seemed to me it was a field in which we'd done little - in fact nothing. I thought it was an area we should have a go at. We wanted something that made not only aesthetic sense but something that made business sense as well and we tackled it on that basis.

"Not only were some of the farmers having problems on their property, but the town of Hamilton would also be in trouble if something weren't done."

The energy of that particular project hasn't finished, in fact it's led to new areas being developed. What makes a project live on like that?

The project didn't die because of the people associated with it. They weren't prepared to leave it at that. What became very apparent as the project developed was the basic lack of understanding between city and country. By city I mean the provincial city of Hamilton knowing little about what was going on on their doorstep. This was despite the fact that schools were closing, farm holdings getting bigger and families leaving the area.

Not only were some of the farmers having problems on their property, but the town of Hamilton would also be in trouble if something weren't done.

How much diplomacy is needed by an executive officer when presenting an innovative idea like that to a board or council?

Well, it's an instinctive thing and we have a very harmonious board. It was, however, a new direction and I guess Sir Ian was the hardest one to convince because it was way outside his realm of interests. There were a couple of governors who thought it was certainly worth doing. I suppose we've been fairly innovative in other things we've done and tried to search out projects rather than wait for them to be dropped on our lap. I think it was just an extension of that.

Is it unusual for foundations or trusts to go out and seek projects?

Not in any other country, but it is in Australia. Most tend to be reactive rather than pro active. There are exceptions to that but

if we're talking about a project of that scale and size, it's fairly unusual. A couple of years on, others looked at it and were perhaps a little envious and I think it has influenced a number of foundations to look for projects for themselves.

Are trusts and foundation guided in their funding by "fashion", for example the environment?

Some are firmly fixed in what they choose to do, which we've never been. We've always been totally catholic in our approach to the things we've done and the things we've listened to. We've always had a very wide charter, whereas others, by the nature of their bequests are constrained anyway. Others are constrained by the nature of what they decide they want to do.

"Success or otherwise really revolves around the people. You can have the best project in the world, but if you can't get good people to run it, it won't work."

Does funding depend to a large degree on the interpretation of the charter of a trust or foundation?

Yes, I suppose. Education, for example, is a very broad field - long as a piece of string, really. Nobody could have guaranteed the grounds well after the Farmland Project or even that it would succeed anyway. There were huge possibilities that it wouldn't. That the farmers wouldn't get behind it and we wouldn't be able to handle it and that we wouldn't be able to show demonstrable results that people would want to pick up and run with. There are great risks in trying to make it happen. That really is what foundations ought to be about: a bit of risk taking. What's the point of just going in and backing something that someone else says is great? If it's not chancy and it's good, it ought to be being backed by government anyway.

You seem to have enormous energy and be involved in many different areas. Could you say a little about your background?

I was brought up in Western Australia, where I grew up in the country for a number of years, which has some impact on you. I've always been interested in the bush and gardens and I suppose the sense of importance of the environment. My sister is the chairman of the National Trust in W.A. and one of its founder members, so there's a fairly strong influence from that direction.

I trained as an accountant. When I came to live in Victoria over 30 years ago, I became associated with Sir Ian Potter and that association has continued over this long period - the longest involvement of my life I suppose.

The Foundation was set up in 1964 so there has been 25 years there. That gave me a fairly wide perspective on what's happening in the total community in all its facets of education, welfare, the whole thing.

Then I got into the plant nursery business and was in that for about 17 years. I had two nurseries at one stage and that kept me fairly close to the environment. In 1981 I got onto the Zoo Board, another environmental interest in a sense. One thing adds to another. To use the current parlance, the networking



Pat Feilman. Photographs by Dale Mann

becomes very important and you become interlocked with a lot of people who can help you do things in different places.

Is The Ian Potter Foundation looking at a particular direction at present?

We're working on trying to look at the homeless children in a slightly more innovative way, not necessarily just in the provision of accommodation. This again seemed to be an issue that a foundation with a fair amount of money just couldn't ignore. What we don't want to do is just prop up the government system, which should be doing a lot more. We're looking at working with the private welfare area, trying to tackle the problem before it happens.

Is there a key to success for projects chosen for funding?

Success or otherwise really revolves around the people. You can have the best project in the world, but if you can't get good people to run it, it won't work. And you don't know that at the start of the project.

The strength of our Foundation is the diversity of its board. Each person has their own network, their own field of expertise. They are people with very high integrity, able to rise above their institutions and able to look objectively at proposals. Working with people for whom I have such great respect - and the success of the some of our important projects - have made the last 25 years immensely worthwhile for me.





Meriel Wilmot.

Meriel Wilmot is widely known in the philanthropic community. She was the first Executive Officer of The Myer Foundation, taking up her appointment in 1961, a position which she held until December, 1982.

In her other life, she is Lady Wright, wife of the retiring Chancellor of the University of Melbourne, Professor Sir Douglas Wright.

She gave this interview in Melbourne to PHILANTHROPY Editor, Jane Sandilands.

How did you first become involved in the philanthropic area?

When I went to England in the early 1950's, I had four or five introductions, one of which was to the Nuffield Foundation. Though initially I worked with the Nuffield Provincial Hospitals Trust, I moved to the Foundation itself a year later and saw the grant making processes and the way in which a Foundation can bring about changes in a community. I suddenly realised the importance of this huge industry, the existence of which I'd never known before.

Little seems to be known about philanthropy in Australia by the general public. What is the situation overseas?

In England there's a very much greater knowledge about philanthropy among the general public - it's certainly much more of an open book. In America it gets greater publicity, largely because the major foundations in America are tied to three major American institutions: Rockefeller, Carnegie and Ford - they're everyday words in American life.

Historically, the foundation of America and Australia was so opposite. America was founded by people who were fleeing government, loathed government and resisted attempts to set it up. Australia exists for two reasons: first that England wanted a dumping ground for its convicts and secondly it wanted a military/naval presence in the southern seas. That is, we exist because of government decisions. To my mind this is the reason Americans say "What can we do about it?", whereas Australians say "What's the government going to do about it?"

How do you see the development of the philanthropic sector in Australia today, compared with a few years ago?

Ten or even eight years ago, it was very much an individualistic performance, with everyone playing their cards extremely close to their chests. That's why it was difficult to get trusts to go into the Directory (of Philanthropic Trusts) for example, or to come into the Association (Australian Association of Philanthropy). They all wanted to do their own thing, believing they knew exactly how it should be done.

I think that's changing now. It has certainly changed with regard to perhaps the ten major trusts, who are far more prepared to co-operate and to look at philanthropy as a profession as well as an industry but there's a very long way to go with the vast majority of the smaller trusts.

Could you define the "profession" of philanthropy?

I believe it to be the intention of collecting information about the community and understanding the community so that when people come to you for funds, you can measure their request against what you know from your own research. You therefore make an informed decision. It also means you can go out into the community and initiate work instead of just sitting there and waiting for people to come to you.

A lot of this is dependent upon what staff you have - the numbers and their training. A lot of the smaller trusts don't employ a full time person. There are still trusts which have a set list of recipients which they tick off once a year. Again, one needs to look at the charter of the trust. Criticism might be levelled at a trust for not supporting Aborigines, or helping work on drug dependency, but the terms of that particular trust deed might be so narrow that they're quite unable to go into those sorts of areas. I think, however, the majority of trusts are still in a pretty conservative and unadventurous mould.

Do you feel that the people employed by a trust or foundation, especially the Executive Officer, need to have extraordinary qualities?

Extraordinary - that's too extreme. They need to be well informed and I was extremely fortunate in that I had the chance of being trained in a world class foundation. Secondly, in 1976 when I went to America to do a study of corporate philanthropy, I had hands on experience (to use the current terminology) of seeing how grants were made. In corporate philanthropy, there is an even greater requirement to know your community, get out into it and see what's happening.

Some corporate philanthropy operates because of enlightened self-interest. Mayne Nickless, for example, aware that there was increased hijacking of their vehicles because of the prevalence of drug-taking among young people, decided to put money into looking at what they could do about the drug problem.

Corporate funds are given by corporations who have a heart, being part of the jigsaw of a community. They actually plough something back. A good example of the responsibility aspect is the R.E. Ross Trust, whose income is from Hillview Quarries

digging holes in the Victorian countryside. When Ross died, the major area of the Trust was directed towards conservation, philosophically filling the holes up again.

The granting of philanthropic funds seems a wonderful opportunity for social innovation.

Yes, but the size of philanthropy in Australia is not big enough to turn the world upside down. In America it's so enormous that to some extent that activated the somewhat destructive legislation brought down in that country in 1968. There was a very great fear that because of the size of the grants from Foundations like Rockefeller and Ford, it could be very dangerous.

"Ten or even eight years ago, it was very much an individualistic performance, with everyone playing their cards extremely close to their chests... I think that's changing now."

Ford, Carnegie and Rockefeller all had very highly trained and well informed executives who saw social problems and the cause of them, and were prepared to put money right underneath a problem, not just put on band-aids. For example, Ford did an enormous amount of work with the black community in Chicago, training black leaders. Now that was a tremendous threat, suddenly to have well trained, well educated, assertive, articulate black leaders in the community.

What are your own particular interests in philanthropy?

My principal interest - and this is a personal thing because of my education - was in the humanities. I tried to persuade, for example, the Academy of Humanities in Canberra, which was full of elderly and conservative gentlemen that if the Academy wasn't going to get out there and fight for grants and government long-term funding, no-one else was going to do it for them. I became a bit of a gadfly and I'm sure I was very unpopular, but eventually they did get going. They got a first rate Honorary Secretary who got government money and corporate grants.

My other great interest is the social sciences. The major social science project while I was with The Myer Foundation was the Aborigines in Australian Society project, which began in 1962. I can still remember being at a luncheon in Dame Merlyn's office and talking with Bails Myer. I said to him "I have a dream..." - I wasn't consciously quoting King. "And that is that someone does a major study of Aborigines in Australia." And I still remember Bails looking up and saying "Why not?" So then I set to work, read and read, talked and listened and eventually the Social Science Research Council accepted the auspice for it.

In a case like this, you provided the framework, the feasibility study, the evidence. What about the risks involved in case it doesn't work?

Risk taking should be a prime function of any good foundation. The government can't afford to take risks with your or my taxes - and in fact they shouldn't. Foundations can take risks and should do it because if they don't, nobody else is going to. Sometimes you fall flat on your face, but I don't necessarily think that's a bad thing if a project does fail. You've learnt a

lesson - and it's still a demonstration project. You know this doesn't work, or at least it doesn't work that way. We tried it a particular way and it was a flop, so if it's tried again, it will have to be done a different way.

When you and Pat Feilman talked in the early 70's about the possibility of an association of philanthropy, what was the thinking behind that?

The main reasons, apart from talking to one another, is to improve the quality of giving. At the time, three or four trusts were meeting on a regular basis, considering applications and it was felt that this was very beneficial, leading to more professional philanthropy.

The recent Conference pointed to the difficulty that grantseekers sometimes have in getting information about trusts and foundations. Why do you think that is?

Basically I suppose if people know I've got money to give away, they're going to ask me for it. I think this is why so many trusts and foundations refuse to go into the Directory. And they're still knocking us back. I'm sitting on the committee which is planning the next Directory. Marion Webster (Executive Director of AAP) is receiving letters from people not just saying they don't want to be included, but how did you find my name in the first place - and please don't write to us ever again. These trustees fail to appreciate that once they receive the benefit of tax deductibility for their philanthropy, the money ceases to be private money - it becomes public money.

What do you feel about the future of the Association?

I'm certainly hopeful about it having a very positive role. At the moment it is being funded privately by various trusts and foundations who I believe are both generous and farsighted. Of course the real future of the Association is its strength as a lobby group. It needs to be a strong, united body.

The question of grantseekers being part of the membership of the Association creates considerable controversy. What is your view?

I am personally opposed to them being members. Fund raisers have their own organisation - T.A.I.F. - the Australian Institute of Fundraising, and it seems to me contradictory to have fund raisers consorting with fund givers within the one organisation. This is not to say that they shouldn't meet together in, say, an annual joint conference which could be very useful.

However, my principal objection is that non-member trusts, already nervous about public exposure, may be deterred from joining the Association. At the same time, I understand that both groups belong to the Canadian equivalent of AAP and it works quite successfully there.

Is there any particular time with The Myer Foundation that you regard as a highlight?

Overall, it was an extremely satisfying time for me. I was always interested in learning, finding out new things - I didn't like not knowing what was going on around me and my work with the Foundation allowed me to find out new things all the time. I remember at one stage there was an application on my desk from the Australian Ballet School and another for the eradication of cattle tick in Queensland on my desk and I thought how lucky I was to have such a varied job! And yes, they both got a grant.



Conference Report

Independent Funding in the Community Sector

"...the second day..interesting but intellectually very demanding"

"I came away feeling that more questions had been raised than had been answered."

"The difference in the positions between two speakers, Elizabeth Proust (Victorian Attorney General's Department) and Hayden Raysmith (Editor, Australian Society) regarding a Charities Commission... and the absence of a negotiating timetable or process brought to mind the pilots' dispute."

"A decision to join (the Association) would be enhanced by an indication that it will have similar events on a regular basis."

"On a personal level, I was pleased to renew and extend contacts."

"Speakers were open and candid and there was a lot of material to absorb."

"Congratulations to Myer and AAP for an excellent conference. It accurately reflected the reality of the sector - more questions than answers and big unresolved issues."

Conference Objectives

1. To familiarise people actively, or potentially, involved in providing philanthropic funds with the achievements and possibilities funding can bring about.
2. To promote the sharing of ideas between grant makers and grant seekers on the role of independent funding in the community sector.
3. To promote information exchange on innovative independently funded projects.
4. To enhance the partnership between grant makers and grant seekers.
5. To promote greater awareness of the place of philanthropy in the community and the role of The Australian Association of Philanthropy.



Secretary of the Victorian Attorney General's Department Elizabeth Proust with New Zealand visitor, Diana Crossan.

Independent Funding in the Community Sector

Convened jointly by The Australian Association of Philanthropy and The Myer Foundation. October 18th and 19th, 1989

An Historic Occasion

This is the first national conference to discuss philanthropy ever held in Australia. It attracted over 140 participants from Australia and overseas. In his welcoming address, Father Vince Kiss described it as "an historic occasion".

The importance of philanthropy, he said, was "never greater" especially with the re-scheduling of government funds and the consequent increase in applications for funding.

Mr. S. Baillieu Myer, officially opening the Conference, also underlined the importance of philanthropy in Australia today and the increasing responsibilities for the Australian Association of Philanthropy.

The AAP, he said, reflected the growing emergence and maturity of the philanthropic sector, which had "many minefields and challenges ahead".



New SouthWales Contingent: (L-R) Chris Roper, Board Member, Law Foundation of NSW; Terence Purcell, Director, Law Foundation of NSW; Dawn Wong, Grants Administrator, Law Foundation of NSW; and Kate Harrison, Communications Law Centre.

Opening Night

On the Tuesday evening before the Conference, a reception was held at the CUB Malthouse Theatre, now the home of the Playbox Theatre Company.

Kensington Catering, part of the Macaulay Community Enterprise Network, served wonderful food, gave great service and helped make this pre-conference reception a success.

Kensington Catering: (03) 372 1493.

DAY ONE:

A Hive of Conference Activity

Day One was the day for grantseekers to talk about their projects. Conference participants chose particular sessions to attend and there is no doubt that the innovation, energy and dedication of the groups taking part made Day One an educational experience of the best kind.

THE SCIENCE SHOP

Kerrie Mullins Gunst, Manager of The Science Shop, was an enthusiastic speaker. The Science Shop operates a free information service providing science, engineering and technology information, tailored to individual needs. It also

initiates and/or manages special science projects. The Science Shop organises workshops, conferences and publishes science based information. It also has a stock of games and toys related to science (which held a good deal of fascination for Conference participants).

The Science Shop is a national pilot project.

Funding Sources: Swinburne Ltd. Victorian Ministry of Education, The Myer Foundation, Victorian Department of Industry, Technology and Resources, Commission for the Future.

The Science Shop:

Kerrie Mullins Gunst (03) 819 8705.

MANAGEMENT SUPPORT AND TRAINING UNIT OF THE VICTORIAN COUNCIL OF SOCIAL SERVICE

Jenny Cameron, MSTU co-ordinator, spoke about the Unit's objectives to promote and help the development of more effective and efficient management of community groups.

She made the point that such groups were cost effective largely because of their volunteers. She stressed that for the community sector, good intentions were no longer "good enough" especially in the face of changes to regulations. (She instanced the fact that bodies receiving funds over \$5,000 now have to be incorporated)

She said that the MSTU could help groups avoid pitfalls, fill information gaps, comment, give advice and enhance the overall effectiveness of the work of community groups.

Funding Sources: The Myer, Lance Reichstein and Stegley Foundations.

MSTU:

Jennifer Cameron (03) 419 3555.

COMMUNITY TECHNOLOGY LTD.

Co-ordinator Jack Gilding demonstrated the computer program: Social Security Enquiry System (SSES). The program, (a Legal Expert System) provides access to detailed

Making the Conference Tick

Who made the Conference tick over smoothly, making sure everything happened at the right time and in the right place?

Conference Organiser, Anne Frost
(03) 383 6224.