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# Philanthropy

The Journal of The Australian Association of Philanthropy

Winter 1991

## Feature: The Future of Ageing



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## Philanthropy

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For enquiries or information about the activities or membership of the Association, the journal or subscriptions, please contact:

The Australian Association of Philanthropy  
8th Floor, 20 Queen Street, Melbourne, 3000  
Telephone (03) 614 1491 Fax (03) 614 8471

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*Editor:* Jane Sandilands  
*Editorial Assistance:* Joanna Johnson  
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## Cover Note

**Cover photograph:** The Kingston Centre was originally the Victoria Benevolent Asylum, the foundation stone of which was laid on June 24, 1850. It moved from its ten acre site bounded by Abbotsford, Elm, Curzon and Miller Streets, North Melbourne, to Cheltenham in 1911. Our cover photograph shows the arrival of patients and staff at the new premises on March 27, 1911. 513 patients (including 313 bed-ridden cases) were transferred to the new centre.

Many thanks to the Kingston Centre for allowing us to reproduce this photograph.



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# Editorial

I welcome this opportunity to introduce myself as the newly appointed Director of the A.A.P and Editor of *Philanthropy*. My task is made easy by the outstanding contribution of both Marion Webster and Jane Sandilands in developing the style and impact of this significant journal for philanthropy in Australia.

In 1976, the Victorian Council of Social Services was funded by a number of Trusts to establish the Volunteer Resource Centre in order to promote the growth of volunteerism at a critical time I was appointed its Executive Director.

My three year involvement with the Volunteer Resource Centre confirmed for me that volunteerism, or giving 'in kind', is on a continuum with philanthropy.

I am now looking forward to the challenges of promoting philanthropy in the form of both private and corporate giving, at a critical time in Australia's development as a society.

More and more emphasis is now being placed upon charitable tax deductions as a form of 'diverted taxation', a way in which funds which would otherwise have been meant for public programs have been privatised.

One consequence of this type of thinking will be increasing calls for more public accountability and the consequent insistence on more government regulation and control.

Another response, in these tax hungry times, will be to insist that government take back this form of giving to itself.

Private and corporate trusts and foundations must eventually determine their own positions and their clear roles.

Political realities will now dictate major cutbacks in public expenditure in social programs. As governments withdraw to the basics, it will increasingly become the role of private funding to maintain the research and development component of such programs.

The time-honored role of voluntary agencies and private funding institutions will gain an ascendancy in pushing back the frontiers of care and support programs, and the nurturing of cultural pursuits, in ways in which governments, with their mandate for the universal provision of services, can sometimes find too difficult to achieve.

The Australian Association of Philanthropy must be in the strongest position to provide the focus for possible self-



Max Dumais, newly appointed Executive Director of  
The Australian Association of Philanthropy.  
Photo by Dale Mann/Retrospect

regulation, in order to ensure that governments need not find it necessary to intervene in the area of private giving.

However, the Association needs to increase its current membership to cover the greater majority of the 450 trusts and foundations listed in its Directory, in order to signal to government that it can expect a reasonable response to any such overtures for intervention.

In order to prevail, private and corporate philanthropy will need to respond to the legitimate demands for more accountability. The ways in which grant-seekers can find their way to funding sources, the basis on which such funds are distributed and the measurable public good that will be achieved in the proper disbursement, needs to be open to public scrutiny and evaluation.

The Association has a major role in assisting all member personnel to rise to these challenges and to prevail with both professionalism and personal commitment.

Private and corporate philanthropy contributes significant resources to the well-being of our society. Cash is probably the least potent of those resources. Private, and particularly corporate philanthropy, represents a cross section of public, business and community leadership, of both sexes, which is both strong and vital.

The challenge facing the Association in the coming twelve months is to secure its position as a focus for those resources in ways which ensure the future development of philanthropy and enhances both the incentives and motivation for continued private giving.

Max Dumais

# Issues & Challenges



John Sullivan, Perpetual Trustees, Lisa Trood, Victorian Health Promotion Foundation.  
Photos by Dale Mann/Retrospect

**John Sullivan, Manager Charitable Trusts, Perpetual Trustees, spoke at the AGM of The Association on the subject of Issues and Challenges for the 1990s. Following is an edited version of his speech.**

Probably everyone in this room will have their own agenda in this area of issues and challenges and some will be very different to others. I propose to refer to just three matters.

My first comment is in the general area of short-term issues and challenges. What I mean are those issues and challenges which will have their genesis in government policies and changing economic circumstances.

My day to day experience indicates:

- that government policy changes in the field of aged care and accommodation have put considerable pressures on the providers of those services;
- that policies of integration and de-institutionalisation have raised new pressure points;
- that policies of immigration have created unforeseen issues of need;



Arthur Gayleard, The Jack Brockhoff Foundation, Rana Flowers, Office of the Human Rights Commissioner.

- that rising levels of unemployment, and changes in the structure of that body of unemployed persons, have not only raised the need for welfare assistance but have created whole new areas of need not previously of significance;
- that changing economic circumstances, including the loss of commodity markets, a loss of confidence in financial institutions coupled with a financial loss in some of them, have created a new category of people in need; and
- that such issues as I have mentioned are not confined to metropolitan Melbourne but are also matters of great significance in rural Victoria.

We are now experiencing a heightened climate of need for our philanthropic support and are expecting that need to continue for some while yet. We are facing that increased need at a time when it is put to us that government is reducing the level of its support for some of the service-providing agencies.

Indeed it was reported to me very recently that a State Government department involved in services delivery to the community had not only told the agency representatives that



Barbara Ryan, The Lance Reichstein Foundation, Jenny Gill, The Roy McKenzie Foundation (New Zealand), Genevieve Timmons, the Lance Reichstein Foundation.

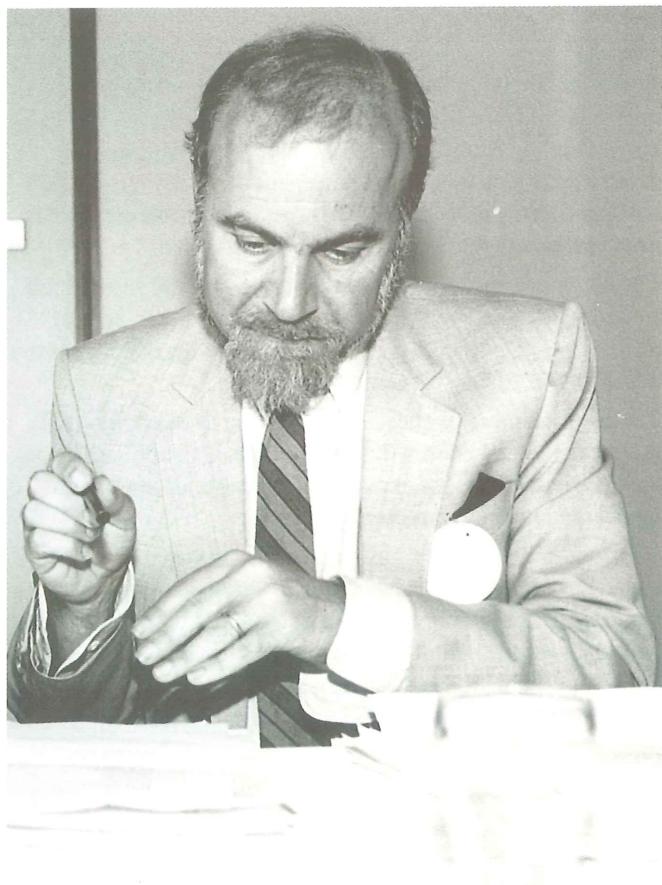
the cupboard was somewhat bare, but had held up a copy of the Directory of Philanthropy and suggested that was where additional funding would have to come from.

And that is a notion that does not sit comfortably with many of us.

What we have impacting on us is an explosion of need.

We can, I believe, reasonably expect the community sector and particularly its welfare component, to be a focal point for need to a degree unparalleled in the last decade and for that need to be stretching well into this decade.

That in turn is going to create other pressures for trusts and foundations. Our arts community may have to fight for its survival as business sponsorships become harder to acquire, as government support dwindles, and as the contracting capacity of the community to provide its financial support



Michael Liffman, President, The Australian Association of Philanthropy.

takes effect.

Similarly with our very fine research community.

We in the philanthropic community have neither the capacity nor the will to be the financial panacea for those affected by changes in government policies and economic circumstances.

My second comment relates to issues and challenges in the structure of organised philanthropy.

As practitioners in the field of organised philanthropy we have experienced in the last decade both a growing together and an absolute growth in our area of interest.

We have seen this Australian Association of Philanthropy grow in achievement and potential. We have found fellow travellers not previously known to us. We have seen, heard,



Jenny McGregor, Commission for the Future, Louise Davis, IBM, Anne Scally, The Stegley Foundation.

enjoyed, and benefitted from the sharing of the collective wisdom of our colleagues.

As the 1990s progress I expect we are going to be put to the test. The challenge before us is not to be found wanting.

We are, without doubt, a part of our society entrusted with important responsibilities. With the other components making up the community sector, we share responsibilities in the management of financial resources and people resources upon which the community sector relies in its delivery of medical, welfare, research, artistic and other programs.

Regrettably, the management of those resources falls, from time to time, into disarray.

It is my view that an important structural challenge for the 1990s is to put together a network of mutual understanding and support that will strengthen the community sector and give it a voice in matters which concern and affect the sector and the effective management of its affairs and responsibilities.

I am on record in several places as advocating there be created a communication link between this Australian Association of Philanthropy and The Australasian Institute of Fundraising.

There are matters of relevance to the community sector which would benefit from joint discussion, from joint concern for standards, and importantly, from the promulgation of joint points of view, all strengthened by mutual understanding and support.



Trevor Jacobs, Mayne Nickless, Frank Payne, The Lord Mayor's Fund, Sandra Tidd, Melbourne Citymission, Bronwyn Street, The Arthritis Foundation.

At a time when criticisms of activities within the sector are rampant in three States, it is time to grapple with the issues, to reach for the challenge of a structurally strong community sector.

For our part in that coalition we must be strong, to find the ways of making our Association financially secure, relevant to its membership base, and the cornerstone of organised philanthropy in Australia.

My third comment is to frame the picture of issues and challenges down to a more individual level and to quickly share what I think the issues and challenges in the 1990s might involve.

They seem to be something of a cross between a shopping list and some New Year resolutions - but can perhaps be



Iris Mason, The Australian Association of Philanthropy, with *Giving Australia*.

encapsulated in two words—opportunities and consequences. Regardless of size, or of the breadth of special interests, or whether we are operating from a family business or individual base, we have amongst us the common bond of the altruism and the excitement of philanthropy.

I have both constraints and great freedoms in the philanthropic capabilities of the many trusts and foundations in my care, and no doubt many of you are also confronted by similar constraints and freedoms.

The opportunities those constraints and freedoms bring forward are both diverse and significant. They give us the means by which to put in place the dreams and visions of the



Rob Kerr, Warwick Forge, Victorian Conservation Trust, Richard Bluck, Williamson Community Leadership Program.

benefactors who have empowered the Trustees to do just that. They cause me to nurture an open mind, a receptive ear. They stretch my thinking as do new trusts and foundations being now established. For example, in very recent times, I have been asked by benefactors to consider for them issues as diverse as: specialty care for the aged; the teaching of ballet; advanced surgical techniques for specialist medics; studies in international peace; and care for the disabled.

The challenge for us all is to take those opportunities which present, and wherever they present, to seize the vision, to make it happen, to do it right, and to not be diverted from the quest for excellence in what we do.

The consequences of success are to bring to our community the incalculable benefits that are at the heart of philanthropy—the alleviation of those conditions of health, of dignity, of justice which deny opportunity.

The consequences of failure to take the opportunity, a failure to seize the vision and act on it, is to abrogate the trust which has been placed in our hands, to be satisfied with second best, and to allow our community to gravitate downwards.

To take up the opportunities and the challenges in the decade of the 1990s is not going to be easy—but take them up we must.

In closing, I am reminded from the Lewis Carroll story that the Red Queen told Alice it was now necessary to run faster just to stay in the one place. We need to run faster, to do it better, to search for excellence.

I am very confident we can succeed.



Sandra Bardas, Greenhills Foundation.

# Visiting the Dream Café

J

an McDonald has been a theatre director for many years and works with people of all ages.

She talked to Krista Hughes about her work with the aged and the contribution they make to good theatre.

Jan McDonald (also known as Meme McDonald) is to have her book about the Northcote Hydrotherapy and Massage Self-Help Group published by Penguin next year. The photographs accompanying this article are from the collection to be featured in the book *Swimming, Not Drowning*.

The Northcote Hydrotherapy and Massage Self-Help Group received initial funding from the Victorian Women's Trust.

Jan McDonald, theatre director, challenges the concept of "the aged". She says that there is really no such group. "How do you decide where the cut-off point is?" she asks. "Some might as well be in their graves at 30; others at 90 are incredibly youthful... you have to come to terms with the process that's happening to you."

Our society tends to isolate the aged, and stereotype them by underestimating their capabilities. Because older people are often excluded from community activities, they sometimes



Photos from forthcoming book, *Swimming, Not Drowning*, written and photographed by Jan (AKA Meme) McDonald.

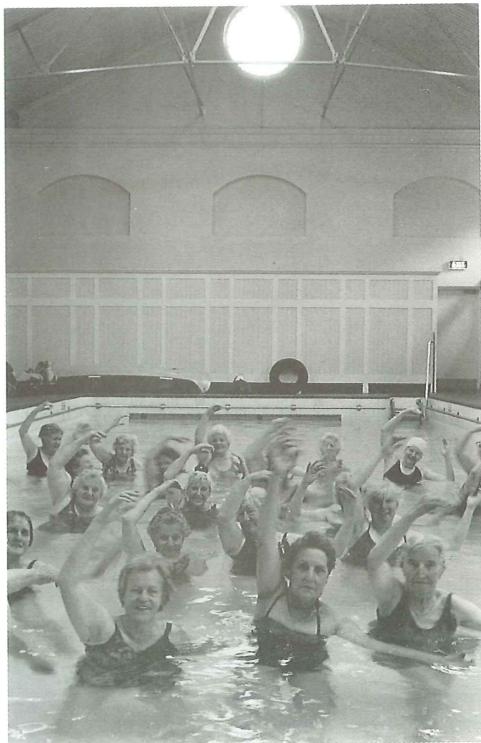
need extra encouragement to overcome this feeling of estrangement.

Jan McDonald says that it comes as a shock to many people to discover that they are valued less as they grow older. Once nobody listened to young people, but now the "pendulum" has swung to the other extreme, with the result that we miss out on the wisdom and knowledge that the older members of our society have acquired.

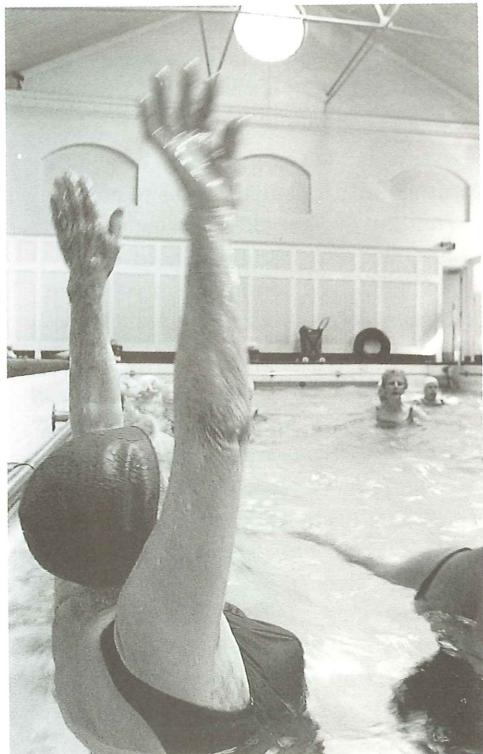
She thinks that it is very important for all the different age groups to be kept mixing in society. For younger people, "the connection with those who have lived a long time is a very enriching experience", although unfortunately a somewhat rare one within the scenario of the suburban nuclear family.

In the past, people weren't as obsessed with death. It was a natural event, a fact of life, and not something to be avoided as it is now. "The quality of life no longer seems to matter; we just want to be alive." An 80 year old can remember that as a child, a death was a big event. Getting dressed up, flowers everywhere, and the whole community involved in the funeral. An older generation, with different perspectives and ideas, have "a lot to teach us".

In 1985 she worked on a project in Kensington, an inner city Melbourne suburb. Her job was to direct a part of the show, called "The Dream Café", and to work with people in the senior citizens group. She attended some of their meetings, and noticed that they especially enjoyed singing. It seemed to her that "what people still flirted with, and what the songs were about, was love. And so I suggested that we do the history of love." They performed several short segments, incorporating both drama and song. For her, the highlight of the show was the Romeo and Juliet scene, performed by a couple in their 80's who had recently married. "That moment of her dying, and then him..."



*“...what people still flirted with, and what the songs were about, was love... so I suggested that we do the history of love.”*



She found it moving because “you really recognised that people of that age could just be falling in love too. And yet some would say that they were at the end of their lives. They might live one year, or ten, but then none of us ever know.”

Something else that Jan McDonald has noticed in her contact with the aged is that the older people get, the more radical they become. “Not in terms of politics, but on a personal level. They don’t have to worry about what people think, and they’ve often got over the inhibitions that we have when we’re younger.”

Her greatest pleasure comes from joining different groups in the community in a co-operative project, such as “Wings of Summer”, which took place in South Melbourne (see *Philanthropy 7*), another inner city area, in the summer of 1990. An outdoor event, it involved a procession down to the beach and once there, a drama and dance presentation. Various community groups participated, such as students from local schools, dance and exercise classes, councillors, and residents of the South Port Nursing Home.

When a representative from the nursing home asked what they could do to help, Jan McDonald had to think of a way in which the residents of the home, mostly bed-ridden or in wheelchairs, could be incorporated into this outdoor production. She discovered that they liked art and craft work, so she got them to decorate stars and other things that could be attached to a Cloak of Wisdom. This was then handed over by the aged to the rest of the procession, to “represent” them in the events on the beach.

On the night of the performance, there was no way of knowing whether there would be anyone outside the home at all, as it was a night-time event, probably too late for the home’s residents. The procession, with performers of all ages and audience members, started off, and was soon approaching the nursing home. “We came around the corner and saw the home decorated with lanterns that they’d made, and about 30 old people outside. And immediately, your heart just leapt into your throat.”

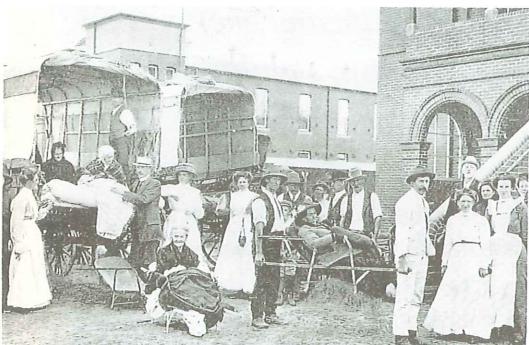
The most extensive project Jan has undertaken with the aged is a book of photographs and interviews which she has been researching “off and on” for the last four years, and which focuses on the Northcote Hydrotherapy and Massage Self-Help Group.

The motivation for starting this group was the frustration which many older people feel when they are forced to struggle with physical deterioration, and the restrictions which this can place on an alert mind. The women do water-based exercises, followed by a massage session. This internally-run group was the first of its kind, and is now being used as a model to set up similar ones throughout Australia.

Two of its members have multiple sclerosis, commonly held to be both degenerative and incurable. Jan said that one of them had vowed, upon joining, that she would be walking within six months. “I didn’t say anything. I didn’t want to be discouraging, but I certainly didn’t believe that she would.” Jan visited the massage centre recently, and as she entered she could see, against the light, “a figure, sort of shuffling”. It was the woman who had been confined to a wheelchair. “I couldn’t believe it! She just laughed, and said, ‘Yes, and I’ve still got two months to go!'”

Jan McDonald finds that community theatre projects and the self-help group have in common a liberating, nurturing effect on their participants. The activities are important in themselves, but they pale beside “the sense of community, the sense of belief and hope and possibility” that these groups foster. “Society discourages in so many ways but the groups’ message is ‘well, let’s give it a try’.”

Krista Hughes is a New Zealander, studying and working in Melbourne.



Arrival of patients and staff at Cheltenham premises in 1911.  
Photo courtesy of the Kingston Centre.

# A Garden Called Mobility

***The Mobility Garden at the Kingston Centre is a symbol of what the Centre is all about - keeping people moving. Ron Munro, Appeal Director, smiles as he says "patients don't get bedsores here - we don't let them stay in bed". But the seriousness of the intent to keep people moving is evident in every aspect of the Centre: in its physiotherapy, occupational therapy and speech pathology programs (among many others) and in its most recent acquisition, The Helen Schutt Centre.***

Opened on the 40th anniversary of the death of Helen Schutt by Mrs. Jean McCaughey, this Leisure and Recreation Centre consists of a coffee shop, a secluded and inviting courtyard, hairdressing salon (patronised by both patients and staff of the Kingston Centre), music room, reading room, office and gift shop.

The philosophy behind the Helen Schutt Centre is to encourage independence, involvement and movement. In the music room, Music Therapist Cathy Meares conducts regular sessions in singing and listening. While the musical tastes of the patients differ, there is always, she says "at least one piece which is a favourite".

The reading room has over one hundred 'talking books' which patients listen to on tape, as well as a wide range of large print books and daily newspapers and periodicals. Both the coffee shop and gift shop are well patronised by both patients and their visitors and Meg Jenkins, the Leisure Centre's Business Manager, says that a lot of thought has gone into the stock held at both. "Patients like to feel they can offer visitors hospitality when they come here and when they bring them to this inviting area (the coffee shop and courtyard), there's a number of really lovely things for them to offer guests." Similarly, the gift shop also caters for patients wanting to please friends and relatives with individually chosen gifts. Here, it is possible to buy a warm windcheater, a pair of hand-knitted booties for a new baby, or an exquisitely crocheted knee rug - as well as practical, interesting items for day to day use by patients.

There is a liveliness at the Kingston Centre evident in every area, whether moving through the Mobility Garden (where patients at various stages of mobility, from negotiating wheelchairs to re-learning how to walk, spend time in graded surroundings), or visiting the day hospital or the woodwork shop, where patients participate in therapy but also appear to have quite a deal of fun as well.

Part of the feeling of life and energy is due, no doubt, to the Kingston Centre's philosophy of "getting people back to their homes", Ron Munro says. Another is the Centre's socialisation program, where older people in the surrounding community come to the Centre (in buses provided by the Moorabbin Council) for activities of various kinds. This program has many benefits; one is to bring new personalities and a wider circle to Kingston to participate in various social activities such as playing cards, painting and drawing. Another benefit is to introduce Kingston to possible prospective clients, reducing loneliness and the strangeness for those who may eventually visit the Centre as patients. The socialisation program, Ron Munro says, "brings the community to us - there are some very lonely people who may not otherwise become involved."

The Kingston Centre has a long history. Its foundation stone was laid in 1850 when it was known as the Victoria Benevolent Asylum. Victoria was then still part of New South Wales and it was largely due to the representations of Charles Joseph LaTrobe, John Pascoe Fawkner and Charles Hotson Ebden to the NSW Governor that funds were provided for "the succour of the aged and infirm crushed down by the cold hand of poverty".

Ron Munro has recorded the early years of the Institution in an Historical Review, written to commemorate the 140th anniversary of its existence:

"Following the successful appeal by LaTrobe, Fawkner and Ebden, the Legislative Council of NSW subsequently voted 1000 pounds for the establishment of the Institution on condition that a similar amount be raised by public subscription.

The ten acre site set aside for the institution was in the area bounded by Abbotsford, Elm, Curzon and Miller Streets, North Melbourne.

On June 24, 1850, a public holiday was declared and a procession of over a mile long left from the corner of Swanston and Flinders Street to the site where the foundation stone was duly laid.

A contemporary account states that "One of the problems encountered was that the Asylum was out in the bush and there was no firm thoroughfare of any kind leading to it. As it was mid-winter, to save visitors from bogging or drowning, an avenue was buoyed at intervals on each side with rude torches, fastened to poles secured in the ground and soldiers and every policeman that could be spared patrolled the bush track from the junction of Queen and LaTrobe Streets between Flagstaff Hill and the Cemetery, to act as pilots for the carriages."

Victoria separated from New South Wales on July 1, 1851 and as the initial building was now complete, a grand ball was held in the Asylum on July 15, 1851 when



Procession of laying the foundation stone (see page 10).  
Graphic from *Kingston Centre Historical Review*

Charles Joseph LaTrobe assumed the office of Lieutenant Governor.

It was determined that one of the principal objects of the Benevolent Asylum was "To relieve the aged, infirm, disabled and destitute poor of all Creeds and Nations and to minister to them the comforts of Religion." From the outset the Victoria Benevolent Asylum provided accommodation for men, women and children and by the close of 1851, the number of inmates was 32. The Lieutenant Governor, Charles Joseph LaTrobe, became the first President of the Board of Management.

The Asylum was supported by a small government grant of about 7,000 pounds, the proceeds of fines imposed in the police courts, collections at the Hospital Sunday appeal and by public subscriptions. In 1880 a special appeal was launched to raise money and an extract from the appeal brochure reads as follows: "The Asylum at the present time is filled to repletion with aged and infirmed persons, many of them labouring under complicated diseases, and all fit and worthy objects for charitable sympathy; whilst every week numbers of gaunt, hungry and distressed persons, of both sexes, crowd the passages, and vainly implore admission."

A condition of entry to the Asylum was that the resident was obliged to sign a will leaving all his/her worldly possessions and assets to the Asylum.

The number of inmates grew at a steady rate and by the close of the century reached 677. The building was extended considerably to house this number.

Following the decision to transfer the Institution to Cheltenham, a light railway was built from Cheltenham Railway Station to the site to convey workmen and materials.



Benevolent Asylum at the turn of the Century.  
Graphic taken from *Kingston Centre Historical Review*.

*Part of the feeling of life and energy is due to the Kingston Centre's philosophy of "getting people back to their homes".*

The buildings were completed in 1911 at a cost of 103,644 pounds and on March 27 of that year 513 patients including 313 bed-ridden cases were transferred to the new centre.

The original buildings in North Melbourne were demolished in 1911 and Victoria Street was extended through the centre of the site.

There have been several changes to the name of the Institution over the years. In 1868 it became the Melbourne Benevolent Asylum and in 1970 it was named Kingston Centre as originally the locality in the Cheltenham area was known as Kings Town."

Now one of the largest rehabilitation centres for the aged in Victoria, the Kingston Centre has a staff in excess of one thousand, offers respite and interim care, and has specialised clinics for acute and chronic pain and continence management. It operates a hundred-bed hostel and day hospitals at three locations. It is an affiliate teaching hospital with Monash University and has a strong program of outreach services.

**Jane Sandilands**

This Leisure and Recreation Centre was funded by the Helen M. Schutt Trust and the following major donors: The Lynne Quayle Charitable Trust Fund; The Ian Rollo Currie Estate Foundation; Kingston Centre Auxiliary; The Jack Brockhoff Foundation; The Lions Clubs of Moorabbin and Bentleigh; Grosvenor Settlement; Collier Charitable Fund; Kingston Heath Golf Club; Mr and Mrs W.M. Hislop; The R.E. Ross Trust; The William Buckland Foundation; H. & L. Hecht Trust; The William Angliss (Victoria) Charitable Fund; The Danks Trust; Estate of C.D. Lloyd Charitable Trust; Mr A.T. Marriott; Estate of George Adams; The Ian Potter Foundation; The Felton Bequest; Estate of Werge Batters; Custom Car Promotions; Estate of I.E. Reid; The Sidney Myer Fund; Country Womens' Association (Dingley Branch); Commonwealth Golf Club Associates; Cheltenham Opportunity Shop; and Mrs May Holmes.

The Helen Schutt Centre was opened by Mrs Jean McCaughey, A.O. on the 19 April 1991.

# The Invisible Samaritan



Portrait of Helen Schutt

A

shorter version of this article was published in *The Age* on April 19th, 1991, the 40th anniversary of the death of Helen Macpherson Schutt.

Forty years ago today, Helen Macpherson Schutt died of pneumonia, at the fashionable Hotel Majestic in Cannes. However, her death was not the end of the Helen Schutt story. In her will, she left the not inconsiderable sum of £400,000 sterling to Victorian charities. Jane Sandilands, who is currently writing a history of Helen Schutt, writes about the search to find the woman behind the name.

Helen Schutt would probably be delighted to know that the money she left in 1951 has now reached the dazzling sum of around \$38 million - and that in her name, between \$2 and \$3 million is given away to Victorian charities and public institutions each year.

Her trust has given funds to help establish the Butterfly House at Melbourne Zoo, several thousand dollars to set up a perpetual scholarship for women graduates at Melbourne University and was the major sponsor for the Museum of Victoria's Greatest Family Album, collecting photographs of 'real' Australians so we can all more properly record our history. (And this is but a handful of the Trust's activities. There are thousands more projects to which the Trust gives funds.)

But what was Helen really like? During the last year, I found two people who knew her, one while she lived in Australia and the other when she had moved abroad. When Queenslander and distant relative John Villiers met Helen - appropriately at London's Ritz Hotel - for afternoon tea, he recalls her being "tall" but added that this impression could have been because he was then aged ten ("and quite small"). "She was a quiet woman, but asked me what I was going to do when I was a man." And Helen's second cousin Lal Gilfillan, recalls Helen being tall and elegant, fair, "a good dresser" and "leaving us beautiful presents for our 21st birthdays".

An only child (of a Mr. and Mrs. Robert Smith), Helen lived with her family at "Egoleen" on the corner of Clendon and Orrong Roads, Toorak, which once belonged to the Sargood family.

What Helen did with her life from her birth in 1874 to her marriage in 1901 remains a mystery. No doubt she attended school (or had a private tutor) but there are no records of her as a pupil of any of the well known private girls' schools and her name is not on Victoria's matriculation records. Nor did she belong to any ladies' clubs.

Helen's marriage to barrister William Schutt in December 1901 was a sumptuous affair. Helen was then 27, William 33, and the wedding took place at St. John's Presbyterian Church, Toorak, with a glittering reception at "Egoleen". Reported with gusto in *The Australasian, Table Talk* and *The Herald* in the fashion of the time, we learn details of Helen's wedding dress: "a lovely creation of richest ivory satin duchesse... with accordéon-pleated flounces of mousseline de soie... trimmed with pearl and silver embroidery". The guests (and their gifts) are listed, from the villa given to the couple by Helen's father, to the lace handkerchief to Helen from William's sister. One gift still in the Schutt family is the silver salver given to William from the Williamstown Cricket and Tennis Club.

Helen had married a man with a high public profile - a footballer, barrister, (later Judge of Victoria's Supreme Court) member of the Council at the University of Melbourne, President of the (then)



# Validating A Lifetime

**“There is a new breed of very old people... The person who used to die at age 75 now lives to age 90. The old have become the old-old. For the first time in history, we live so long that some, who have not achieved integrity, enter a new stage of life. They have a new challenge: the struggle to complete unfinished tasks that have been swept under the rug for a lifetime.”<sup>1</sup>**

Over the past decade, The Stegley Foundation has taken an active interest in the area of aged care. Alongside financial support for our other priority groups (primarily Aboriginal projects and people with disabilities), the Foundation has funded a number of significant projects which tackle disadvantage and discrimination in relation to elderly people. Such projects range from research conducted by the Office of the Public Advocate into instances of abuse of aged people, to enabling aged activists to lobby for improved aged services, to the creation and exhibition of positive photographic images of elderly women to counter the myth that women over sixty are uninteresting and invisible.

Central to our thinking is the notion of successful ageing that goes beyond the basic human needs of shelter and security, to understand old age as yet another developmental stage in a lifetime's process of growth: a time for making peace with ourselves, resolving past conflicts and making meaning of our own lives.

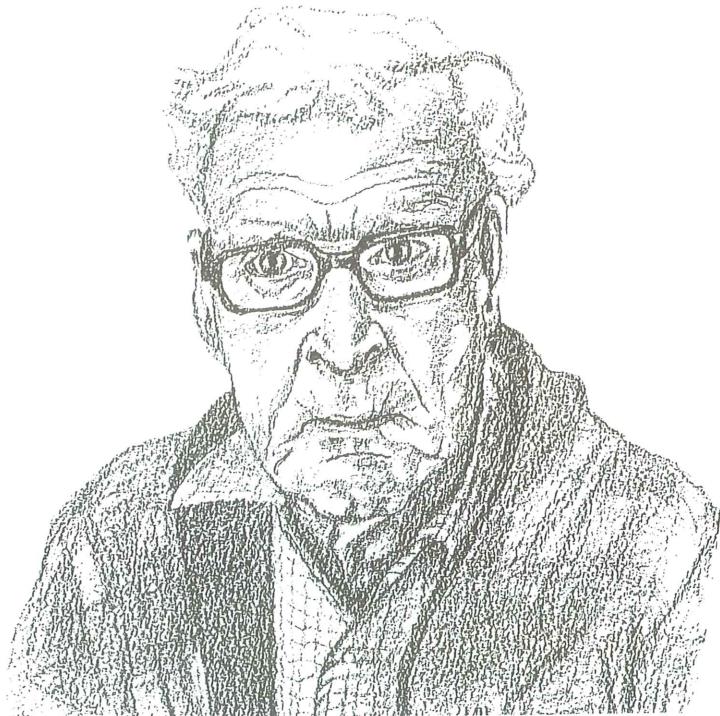
One of the myths of ageing is that it gives one the excuse to shrink into the centre of one's own small world, ignoring the needs of others. We need to be in charge of our own lives - when we surrender this responsibility to others, as so often happens in the institutionalised care of the elderly, we begin to feel anxious, victimised and depressed.

In contrast, a wholistic approach to successful ageing incorporates the following:

**Physical well-being:** Accepting individual responsibility for optimum wellness that includes regular exercise, proper nutrition, meditative relaxation and the elimination of practices injurious to natural good health.

**Intellectual well-being:** Awareness that as long as one lives there is the potential to love, learn, experience, change, grow and become, and the capacity to serve society in a meaningful, productive way.

**Spiritual well-being:** Affirmation of life in relation to a higher power, self, community, environment, that accepts the past, celebrates the present and has hope for the future.<sup>2</sup>



Illustrations by A. Hayes

All this sounds very fine in theory, but how has it been translated into specific programs of philanthropic support to aged care projects?

As stated earlier, The Stegley Foundation has assisted a range of projects, but the focus here is on one of the major approaches the Foundation has funded: the introduction of Validation Therapy techniques into a number of institutionalised aged care settings. The Trustees recognise

*Central to our thinking is the notion of successful ageing that goes beyond the basic human needs of shelter and security...*

that nursing home residents are amongst the most disadvantaged people in our society: largely passive, depressed, invisible and ignored. Validation Therapy, developed by American gerontologist Naomi Feil, can be used both in nursing home settings and by carers of the confused elderly in their own homes. It is a relatively straightforward and inexpensive approach to individualised quality care of the very old, used in over three thousand aged care facilities in the United States, Canada, Great Britain, Norway - and now Australia.

“Nature's changes, due to ageing and increasing destruction of brain tissue, help the very old to retreat to past-time. When loss of eyesight, hearing, recent memory, mobility and sensory acuity blot our present time, the very old person can substitute the mind's eye, past sounds, remote memories and old sensations... They measure their lifetime: they track time by memories, rather than by seconds on a clock. The very old disoriented person has now entered the stage beyond Erickson's “Integrity vs Despair” (Erickson, 1950). I call this



final life stage "Resolution vs Vegetation". The final task is to resolve unfinished business before death."<sup>3</sup>

Feil explains how the carer should empathise with the struggle of the disoriented old person. Treatment is based on the premise that there is some logic behind all behaviour - even disoriented behaviour. The goal is not to jolt the confused elderly person back to present reality; rather to

*"Validation Therapy... is based on the premise that there is some logic behind all behaviour - even disoriented behaviour... dormant speech returns, anxiety lessens, gait improves, eyes light, people begin to interact with others to the maximum of their capacity."*

understand the personal meaning underlying an individual's behaviour. Through empathic listening, the therapist attempts to discover the patient's view of reality in order to make meaningful emotional contact. "Validation techniques allow the carer to access the older person's reality with a genuineness of care for the older person's present feelings. This genuineness is recognised by the confused older person and a trusting relationship is begun."<sup>4</sup>

"The Validation worker becomes a trusted, nurturing, other. The disoriented old person feels safer: dormant speech returns, anxiety lessens, gait improves, eyes light, people begin to interact with others to the maximum of their capacity. They do not withdraw inward to vegetation but express (verbally or non-verbally) feelings of well-being. Validated, they die in peace."<sup>5</sup>

One important feature of Validation Therapy is its positive

*Specific techniques of Validation Therapy can promote a more meaningful, warm and therapeutic relationship between nurses and residents.*

effect on the morale of nurses and carers and the warmer, more relaxed atmosphere it generates within a nursing home. Gerontological nursing has long been the Cinderella of the nursing professions, seen as low-status and depressing work. In providing care for confused elderly residents on a round-the-clock basis, nurses are regularly faced with behaviours which are difficult to manage such as wandering, aggression, anxiety and sadness. Nurses need skills to enable them to intervene and "manage" difficult behaviour autonomously and effectively. Specific techniques of Validation Therapy can promote a more meaningful, warm and therapeutic relationship between nurses and residents.

The success of the Validation approach has been borne out at the Ovens and Murray Hospital for the Aged where staff and families report improved interaction between nurses and confused residents, increased levels of confidence for the nurses concerned, and a happier atmosphere.

"By equipping nurses with a skill which fits well with the humanistic philosophy of nursing, and one which they can prescribe and use when needed, it was predicted that levels of confidence and job satisfaction would increase."<sup>6</sup>

Project evaluation has indeed borne this out.

**Fiona Moore**

**Footnotes:**

1. Feil, Naomi, Validation: The Feil Method, 1982.
2. Stevens Square Wholistic Wellness Model, December 1984.
3. Feil, Naomi, Op. Cit.
4. Ronaldson, Sue and Savy, Pauline, Validation Therapy: A Viable Option for Gerontic Nursing Practice, published in Geriaction, Autumn 1991.
5. Feil, Naomi, Op. Cit.
6. Ronaldson and Savy, Op.Cit.

"The Stegley Foundation has assisted the introduction of Validation Therapy in a number of nursing homes in rural and metropolitan areas, as well as the production of a handbook and resource materials.

Following a review of our funding policy conducted last year, we decided to be more pro-active in promoting the quality of life and care of aged people, rather than simply responding to project applications. Since then we have embarked on a major planning process of drawing together well-informed and experienced aged care workers and educators to "think-tank" a comprehensive approach to professional care for the aged, which incorporates the principles of Validation and a wholistic wellness approach.

# Active At Any Age

## The Victorian Health Promotion Foundation's Health and Fitness Initiative for Older People.

The health needs of our ageing population are one of the greatest challenges facing Australia in the 1990s.

In the past, little has been done to prevent ill health in our senior citizens - despite the fact that this age group uses twice as many health care services as other Australians.

To improve the health status of people aged 55 and over, the Victorian Health Promotion Foundation (Vic Health) launched a major new health and fitness project on June 1st, 1990.

"Active At Any Age" aims to prevent ill health in older people by promoting a range of low impact sports and exercise programs.

"Research shows that regular, low impact exercise is an effective and cost efficient form of preventative health care - and that people of all ages have the potential to lead an active, healthy lifestyle," said Rhonda Galbally, Chief Executive Director of Vic Health. "Older people make up a greater proportion of our population than ever before so their health needs are of vital concern.

"At present, many of our senior citizens expect to become ill in later life and restrict their sporting and exercise activities accordingly.

"Ironically, this inactivity not only impairs their quality of life but the under use of the musculo-skeletal system and social

withdrawal often result in health problems and a feeling of isolation which are mistakenly attributed to old age.

"The 'Active At Any Age' information and referral service will help promote the physical, social and mental benefits of reasonable, regular exercise."

The advantages are multiple and include:

- increased energy and vitality;
- more social contact and greater self-esteem;
- greater strength, flexibility and mobility;
- fewer aches and pains;
- improved circulation;
- more restful sleep;
- reduced anxiety and depression;
- control of body weight and body fat;
- stronger bones;
- improved circulation and reduced blood pressure;
- improved powers of recovery from illness;
- relief from spinal complaints;
- improved bodily functions including digestion; and
- greater independence in later years.

The program recommends more than 120 sporting and fitness activities including walking, cycling, golf, water aerobics and swimming as well as more unusual pastimes such as highland dancing, croquet, armchair exercises, archery and quoits.

"Active At Any Age" is an initiative of the Victorian Council of Fitness and General Health (VICFIT), Vic Health and the Older Persons Planning Office (OPPO).



Active At Any Age Campaign  
Photo supplied by the Victorian Health Promotion Foundation.

# Understanding An

**What will be the defining social issue of the next decade?**

**Will it be unemployment, family structure, the urban environment? Perhaps; but the most likely candidate is ageing.**

**T**he ageing of Australian society has already become something of a cliché in public discussion. Articles appear in popular magazines with such titles as “The Greying of Australia” or “The Babyboomers at Fifty”. Beyond the journalistic tendency to exaggerate and over-simplify, there are actually some fascinating questions to explore here. What will it mean to experience a steady rise in the number and proportion of older people in our society? Should we worry about these trends, particularly in relation to the cost of health and social services?

*The very nature of democratic change means that there will be different expectations for younger people as well.*

First, consider the demographics. About 11% of the population is now aged 65-plus. This proportion will rise to 12% by the turn of the century, and 16% in the year 2021.

This is significant, but not dramatic. Of more importance is the predicted rise in the proportion of “old old” people (as distinct from the “young old” in the 60-70 bracket). Over-80 year olds now comprise about 20% of all over-65s; in the year 2011 they are expected to comprise about 27% of the aged population. The actual number of over-80s will roughly double in this period.

But there is no particular cause for alarm. Rather than worry about the “burden of an ageing population”, it would be more useful to think in terms of the “maturing” of our society. We are, after all, intent on transforming Australia into a “mature industrial economy”, and the maturing of the population, including the workforce, is an inevitable part of this process. At any rate, this has been the experience of our major European counterparts, several of whom have population profiles that already resemble what Australia’s will be in a decade or two.

The very nature of demographic change means that there will be different expectations for younger people as well. Australia will be moving from a society which has been kept artificially young by immigration to a society which will be older. Little work has been done to assess how an increasing proportion of older people will affect the lives of younger people and our key institutions, particularly the health system, the education system and the political system.

## LONGEVITY AND HEALTH

**L**ife expectancy for men and women reaching the age of 60 years has increased by three years over the past two decades, so that men reaching sixty in 1991 can expect to live to 78.3 years and women can expect to live to 82.8 years.

This means that there is now, and will be for future generations, a distinct and extensive third stage of life, retirement/post-employment. For many people, this will last for about 20 years - a period as long or longer than that of the first stage of life, childhood.

Health status will therefore be a significant determinant of the quality of life of older people.

For much of the 20th century, older age was experienced as a period of decline and disease. This perception is now changing. Present generations of older people generally rate their own health as good or excellent, and research indicates that self-rating is a more accurate predictor of health than clinical assessment. This widespread experience of good health is an aspect of older people’s health which has been overshadowed by an emphasis on the disability, frailty, and the causes of death.

*A good argument is emerging for extending worklife, in opposition to the notion of early retirement.*

With increasing longevity, it is no longer possible to regard older people as a homogeneous group with specific health needs. Within the great cultural diversity which characterises the Victorian population, at least three groups should be distinguished.

First, there are the young old, between 65 and 74 years, who are most often physically healthy, functionally independent and mentally alert. Illness in this group frequently follows patterns observed in younger people - that is, acute conditions with a defined clinical course and a return to pre-illness functioning. Preventive health services, primary health care and occasional access to acute hospital services are most relevant to this age group.

Second, there are the older old, those 75 years and above, who are increasingly likely to experience acute illnesses for

# Ageing Australia

*This means that there is now, and will be for future generations, a distinct and extensive third stage of life, retirement/post-employment. For many people, this will last for about 20 years - a period as long or longer than that of the first stage of life, childhood.*

which medical treatment is sought and for which hospital admission may be required. This age group is also more likely to have functional, social and economic dependencies resulting from chronic illness and disability.

Third, there are the very old, aged 85 years and above, who are most likely to be affected by chronic diseases, multiple pathology, continuing and/or progressive disability and dependency. Age-specific medical care and treatment options are most appropriate to this age group.

of the population in the early or prime working age groups will continue to decline, while the proportion of those aged 45 and over will increase significantly. Despite the current high level and rate of unemployment, shortages of labour appear likely, unless unforeseen technological changes reduce the rate of growth of the demand for labour to a rate comparable to that of the labour force. Therefore, it seems that the long-term strategy should be more concerned with encouraging older workers to remain in the workforce rather than facilitating early retirement on a large scale.

This phenomenon is already being experienced in most developed countries. In the United Kingdom, the debate about shortages of labour due to the ageing of the population is prominent. In other countries, including the United States of America, the age of compulsory retirement has been raised or abolished.

Finally, with the call for a "clever country", the experience accumulated by older workers will come to be recognised as a valuable asset.

## WHY RETIRE?

**A** good argument is emerging for extending worklife, in opposition to the notion of early retirement. The argument addresses the critical relationship between the future needs of the economy for an experienced workforce and the needs of older people with an extended span of healthy and productive life beyond the current ages of retirement (55-65 years).

The concept of continuing employment is, of course, by no means self evident, and will require a considerable change in

*With the call for a "clever country", the experience accumulated by older workers will come to be recognised as a valuable asset.*

attitude from both employers and the community.

The argument can be summarised as follows. First, formal work has an intrinsic value for many working men and women. But Western societies have failed to establish the same intrinsic value for the status of retirement. Schooling, parenting and employment still constitute the roles and functions which represent legitimate and valued activity. Over the next two decades, "a central social and economic imperative for societies with ageing populations [will be] the institutionalising, legitimating and financing of non-employment" (Matras, 1990).

Second, there are the needs of industry, and a projected shortage of labour associated with demographic change over the next 30 years.

It is expected that, over the next three decades, the proportion

## LIFELONG EDUCATION

**I**n our society, the most culturally legitimised use of time, apart from work and parenting, is education. The essential basis for compulsory education has been preparation for work, the equalising of opportunity, and preparation for citizenship. Ongoing tertiary education and vocational education is now a significant and growing part of the preparation of younger people for work life.

The role of education for the third age is less well accepted. However, the pursuit of learning, along with active participation in the community, is vital to the quality of life and well-being of all age groups. Through re-training and multi-skilling strategies developed by training institutions, older workers can be provided with sufficient skills to enable them to make a significant contribution in work areas which may differ from their former careers.

The changing enrolment pattern for the Council of Adult Education (CAE), the rapid development of the University of the Third Age (U3A) in Victoria and elsewhere, and the growth of neighbourhood adult learning programs all demonstrate that there is a high demand for ongoing education for older adults. One third of the students in the CAE's Victorian Certificate of Education program are over 50, responding to both the competitiveness of the workplace for older workers, and demonstrating interest in building for

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future tertiary studies. Over 30% of all the daytime students in the CAE hold age concession cards.

The University of the Third Age has grown from a small group of committed volunteers in Victoria in 1985 to over 6000 participants and 28 campuses by 1990. Its rapid development also demonstrates the readiness of older people to volunteer their experience and teaching capacity.

Education programs and courses are offered on the basis of an exchange of skills, thus providing an unparalleled model of co-operation and participation.

There is major scope within further education for the utilisation of volunteerism and skills exchange. Community-based organisations play a large role in the provision of further education programs throughout Victoria, accounting for an annual budget of over \$9 million. Many men and women from older age groups already find involvement extremely rewarding.

There are other programs in Victoria. The Brotherhood of St. Laurence's project called SPAN was built upon objectives of bridging the generations - the reciprocal exchange of ideas, resources, knowledge and skills. SPAN has now been successfully operating for over ten years in a Melbourne northern suburb.

## GROWING OLDER IN AUSTRALIAN CITIES

**T**he urban environment in which most people will grow old in the first 20 years of the 21st century is an environment that was created for young families. It is an environment which was largely planned on the assumption that people had easy access to a car. The design of these suburbs does not recognise that many of the old people who will inhabit the outer and fringe suburbs in the next 20 to 30 years will be prevented from driving by failing sensory faculties long before they need, or want, to give up their independence.

Most people grow old within the neighbourhoods where they now live. Consequently, as the rapid growth in cities like Melbourne has been in the outer and fringe suburbs, the ageing of the population within the next ten years will be most intensely felt in those same suburbs. “Of the estimated 138,000 increase in the 60 plus cohorts between 1986 and 2001, 84% or 115,000 will be located in the outer and fringe municipalities” (Burke and Hayward, 1990).

While the housing stock is relatively young, and therefore is not likely to require extensive renovation and maintenance in the medium term, these suburbs have been designed to be low density, car-oriented, and lacking in services.

This may not be a problem for the “young old”, the 65 to 75 year old, because the majority of them can and do drive. For the “old old” person, however, the very nature of such suburbs may become a problem. The older a person becomes the more likely that they will no longer be able to drive and the more likely they are to find themselves alone through the death of their spouse. This means that the provision, quality and design of flexible and appropriate public transport, and the possibility of reaching basic services on foot, is extremely important in enabling older people to retain their independence.

Low-density development makes the provision of public transport more difficult. For a public transport system to be efficient requires a minimum density of 17 dwellings per hectare. The outer and fringe suburbs have a density of around 10 dwellings per hectare, except in areas with significant numbers of retirement villages.

The layout of many subdivisions developed during the 1970s and 80s also effectively reduces the older person's access to public transport. “Spaghetti” style road layouts were designed to reduce the speed of local traffic but have the effect that large buses cannot penetrate the subdivisions. Also, the pedestrian path between any two places is usually substantially longer than when the road layout follows a grid.

On the other hand, some aspects of recent urban development are beneficial. For example, district centres, which foster the availability of a full range of goods and services, should assist in maintaining the independence of older people. Self-contained, fully enclosed shopping centres also have some benefits. They protect shoppers from the elements, generally provide seating within the mall and separate pedestrians and vehicles.

## CONCLUSION

**A**s we have seen, the ageing of Australian society will be a subtle and complex phenomenon. We can predict a growing perception of old age as a normal stage of life. Certainly, it will be necessary to redesign some aspects of the health system, community services and the nature of the urban environment. But to talk of an impending crisis would be unduly pessimistic, and quite misleading. It is about the maturing of an advanced industrial society.

David Green

David Green is the Director, Older Persons Planning Office, Government of Victoria.

# International Philanthropy in the 1990s



Marion Webster, National Manager, ANZET. Marion spoke at the International Philanthropy in the 1990s Conference about issues facing Australian philanthropy. Photo by Dale Mann/Retrospect

*Marion Webster, former Executive Director of The Australian Association of Philanthropy and now National Manager, ANZET, spoke at this conference which was recently held in New York. The host organisation was the Center for the Study of Philanthropy. The following is an edited version of her presentation.*

**T**his is one of the first opportunities Australia has had to share its experiences at an international forum. My feeling is that while philanthropy in Australia has come a long way in the last few years, it still has a long way to go. Until March this year, Australians had no idea how much money was given by the private sector to the 3000-or-so voluntary sector organisations operating throughout the country. This is not surprising, given that Australians are still unable to say how many charitable trusts and foundations actually exist in the country. Nor can we point to any standardised, formal accountability or regulatory procedures that govern the sector's operation or its establishment.

There is still no broadly-based community understanding about philanthropy or the important role it plays in the provision of venture capital for the voluntary sector. This is unlike the American experience, where philanthropy is generally well accepted and an appreciated aspect of everyday life.

In order to understand the state of philanthropy and the voluntary sector in Australia it is necessary to know the history of both sectors and the development of the legal and taxation context in which they operate. The philanthropic tradition of Australia grew predominantly from origins in Europe and the United Kingdom. A long history of patronage and charity links modern philanthropy with wealthy industrialists of the 19th and early 20th centuries, who themselves were influenced by patrons of art during the Renaissance and, before that, the religious houses of the Middle Ages.

The operation of philanthropy in Australia today clearly reflects those roots, as I suspect is the case with America. In Australia, however, we use the term 'philanthropy' with greater precision than in America. We use it specifically to mean 'the giving of money'.

While there is a wide variety of legal and organisational forms of foundations in Australia, and may well be the case here in America, they fall into four main categories: private; public or community; corporate; and operating foundations.

Private foundations are generally created from a single source of funding, usually one person or family. They don't engage in direct service provision - they pass the funds to other bodies to undertake services. Funds to run private foundations come from endowment income, not from the public.

Public or community foundations are those organised to pool and allocate funds which are then distributed to meet public needs. Corporate foundations, which often enjoy separate status as non-profit bodies, are usually tied to particular companies that provide their funds.

Finally, operating foundations are those that act as direct service providers to charitable groups within the community and usually do not provide grants to other groups.

To establish a foundation in Australia it is necessary to fall within the legal definition of the word 'charitable'. At law, 'charitable' and 'charitable purpose' have more complex and quite different meaning from the broad, everyday definitions.

There is no statutory definition of what constitutes charitable purposes. Instead, the legal definition is based on a series of succeeding interpretations built by English, and now Australian courts since Elizabeth the First's time in seventeenth century England. To this day, the Statute of Elizabeth remains the important key to the determination of what is charitable, at least in Australia. There are four categories that provide the framework for determining charitable status under the common law definition. They are: the relief of poverty; the advancement of education; the advancement of religion; and other purposes of benefit to the community.

The common law definition of charitable purposes is perfectly suitable for

family and corporate foundations, which are usually only seeking income tax exemption and whose funds come from a single source. However, for public foundations, which generally seek tax deductibility for funds raised from the public at large, the position is more complex. They are bound by a much narrower definition of 'charitable purposes'; one defined by the Australian Income Tax Act.

At present, tax deductibility is narrowly defined as applying to public hospitals, public benevolent institutions, public authorities engaged in medical or scientific research, public universities, public war memorials, public libraries and museums, and gifts for purposes of defence. Foundations wanting tax deductibility status have to continue their giving to these purposes.

Given this tighter definition, a foundation requiring tax deductible status in Australia needs to seek the approval of the Tax Office.

In recent years the gaining of deductible status has become increasingly difficult as our federal government is demonstrating a marked reluctance to extend tax deductibility to new foundations. This reluctance is based on a belief by the authorities that foundations somehow compete directly with taxation for funds.

These legal and taxation constraints have important implications for the future of both philanthropy and the voluntary sector in Australia.

Now for our Australian Association.

While a somewhat informal Australian Association of Philanthropy has existed since 1975, the first permanent secretariat of a legally incorporated peak association was not established until three years ago, in March 1988.

The Association's charter is, first, to represent the shared interests of trusts, foundations and corporate giving programs to government, and, secondly, to promote the idea of philanthropy broadly throughout the community.

Over the last three years, AAP, as the Association is commonly known, has worked to dispel the general community ignorance of philanthropy I mentioned earlier. In particular, it has focused on overcoming the lack of hard data about the size of the sector and its funding activities; the lack of clear legal, taxation and regulatory framework in which philanthropy can operate; and the lack of public visibility of the sector.

The Association can now claim considerable success in addressing these problems.

For example, there is now a substantial membership base with more than 60 trusts, foundations and corporate members. While this may not seem many by US standards, it is a definite achievement in Australia, where, until recently, the sector had been characterised by independence, diversity,

and only minimal visibility.

The Association has been able to foster greater openness between trusts and foundations. Many now appreciate the benefits that flow from co-operation. This is a far cry from a few years ago when secrecy, or certainly great reluctance to share information generally, was the order of the day.

To reinforce this openness, the Association now publishes the professionally prepared quarterly journal *Philanthropy*. This raises current issues as well as provides a showcase for innovative projects and programs that have attracted philanthropic funding.

The Association has published a completely revised edition of its *Australian Directory of Philanthropy* which lists around 450 trusts, foundations and corporations. This work has proved a great catalyst to activities, as well as proving a good revenue earner for the Association.

*A Guide to Informed Giving*, another major publication, is a step-by-step guide on how to establish a trust or foundation in Australia. While not a do-it-yourself manual, the book

provides individuals, corporations or groups interested in giving through a foundation, a clear understanding of the very confusing legal and taxation requirements, also providing information about all the issues that must be worked through prior to establishing a foundation.

As well as these publications, regular discussion groups and workshops (attended by members and others) have led to increased sharing of ideas and exploration of current issues facing the sector.

While these activities have raised

the Association's profile, the most significant contribution, and the one which has justified its existence, in my opinion at least, has been the pioneering work undertaken to quantify the size of the philanthropic sector in Australia and the destinations of its giving.

AAP has just completed the first national study of giving ever undertaken in Australia.

The study, *Giving Australia*, looks at giving in all its forms, by six groups: small business; individuals; self-administered foundations; trustee-administered foundations; large business; and bequests. It also looks at the destinations of that giving.

In summary, the findings show that in 1988-9 more than \$1.7 billion Australia dollars (roughly 1.2 billion US dollars) was given by the six surveyed categories to special human services: health; religion; education; general social benefit; arts/culture; and unclassified 'others'. While amounts given in each specific area came as no shock, the total amount given both surprised and delighted us all.

Despite the positive activities, I believe that The Australian Association of Philanthropy is in a fragile position. Organised philanthropy is still new in Australia. Even now there would

# Responding to Hard Times

*An American view of the role of Foundations.*

**Stephen M. Dobbs is President and Chief Executive Officer of the Marin Community Foundation in Larkspur, California, USA.**

**This article was taken from Chronicle of Philanthropy (April 23, 1991).**

**F**ew regions or municipalities in America are experiencing economic difficulties comparable to those of the 1930s which have been historically characterised as "hard times". Nevertheless, an undeniable climate of recession casts a pall over the national economy. The apparent end of the Persian Gulf crisis has buoyed the spirits of some Americans, but whether it provides a sufficient platform to restore confidence- the real fuel for the economic engine- remains to be seen.

Meanwhile, the withdrawal of state and federal aid from community service groups, started during the Reagan years, continues apace. An insidious version of "trickle down" economics has begun to take effect. States scramble for increasingly scarce federal aid, and counties and cities scrape by on concomitantly diminished state reimbursements. School districts face bankruptcy, community agencies shut down needed programs, and the homeless proliferate on America's streets. While life for middle-class citizens goes on and many people begin to think again about buying their own homes, millions of other Americans face the reality of hard times as they struggle to cope with sky-high rents, prohibitively expensive medical insurance, and the fact that taxpayers seem to be inured to the plight of the less fortunate.

What is the role of foundations in hard times? What is the appropriate response of grant-makers to the cutbacks in government support that are having a dramatic effect on many groups that also get support from private, community and corporate foundations? How should philanthropies deal with problems caused by diminished federal and state revenues?

It is certainly clear what is *not* the role of the foundation in hard times: it is not to bail out local, county, state or federal governments. The private, community, and corporate assets of organised philanthropy do not and should not constitute a reserve or auxiliary expected to substitute for adequate public support. In fact, the most pernicious public perception sees foundations kicking in like some kind of emergency generator that is activated when government power is fading.

The present situation is further complicated by the "read my lips" mood of taxpayers, who are reluctant to accept new or higher levies even as they watch the quality and extent of community services - education, health care, libraries, job counselling, social services - deteriorate. Critics of government spending complain of too much administrative bureaucracy or too much proliferation and redundancy in the work of non-profit groups. But increasingly the problem, unlike in some earlier eras stretching back to the New Deal, is often too little money. In some American communities the situation is acute.

Even were the foundation world to subscribe to a bailout philosophy, as inappropriate as that would be and as inconsistent with their purposes and traditional functions, all the dollars available would be insufficient to plug the dyke. *The Foundation Directory* reports that the 7,581 philanthropies listed, which account for 96 per cent of all foundation assets and 93 per cent of all giving, had a total of about \$7-billion in available funds at the end of the eighties. Although that is a prodigious sum, utilising all of it for core support of basic community services - as government support recedes- would do little to stem the tide. The federal government spends \$7-billion every two days!

What is reasonable to expect from grant-makers, to whom applicants look with increasing desperation? A likely surmise is that such questions will occur often in the 1990s. Foundations do have productive options to consider. Here are some of the guiding principles that might help shape a foundation's response to hard times.

- We must make a commitment to step forward in times of crisis, as appropriate, to work in partnership with other philanthropies and organisations to meet the social, economic, cultural, and environmental challenges imposed by the current and anticipated budget climate. By collaborating with city, county, and state government officials, foundation staff members can help co-ordinate plans to restructure organisations that receive both public and private support.
- We should put more emphasis on setting priorities and being selective in deciding which vital community agencies and institutions deserve support. This is particularly important in determining which groups should receive assistance that will help them "glide" rather than "fall" (or fail), especially where significant shortfalls are unlikely to be restored in the near future (California's budget deficit alone exceeds \$10-billion). Solomonic judgement may be required to determine which programs are most critical to a community's well-being. Because the decisions are hard ones, it is even more imperative that the choices be closely reviewed and thoughtful.
- To become more efficient in the use of available dollars, foundations could strengthen their technical assistance programs to help grant recipients adjust to the new realities. The old strategy for a non-profit faced with budget cutbacks- hold on, survive, and wait for restoration of lost funds, which often come miraculously down the pike - is unlikely to succeed. The changes that are occurring because of tight government budgets may have been a long time in coming

but they are probably going to be a long time in staying.

- Grant-makers should review public-policy implications at the same time that they make awards to help deal with a crisis. The magnitude of cutbacks compels public attention to a re-examination of the ways in which community needs are met and services provided. Such reviews may actually produce some positive outcomes from financial crunches. As a *quid pro quo* for a foundation's help in easing the burden of cutbacks by government agencies, state and federal officials should be expected to encourage non-profits to collaborate and consolidate their efforts. This is easier said than done, but pious salaams to cooperation between non-profits will no longer suffice. Hard times are the mother of non-profit necessity.

- Consideration of the impact upon ongoing grant-making programs must accompany the transition from ordinary assistance to that which is extraordinary. It would be inefficient, in response to one crisis, to make drastic cuts in areas of need, current, or prospective, served by the usual grant-making process, thereby creating grounds for further crises. The protection of a foundation's existing partnerships and commitments also limits financial discretion.

Foundation efforts to help public and private community-service organisations adjust to diminished government revenues must be accompanied by a willingness on the part of those agencies to prepare for a long-term economic climate. Hard times bring hard choices regarding a non-profit's program priorities, its ability to recruit and retain staff members, and the efficiency of its operations.

Responding to foreseeable economic and public-policy trends and realities requires planning, organisation, courage, and thoughtful implementation of change. Short-term and patchwork remedies will be inadequate. Foundations must wisely invest their financial and human resources in helping their communities face hard times. Ultimately, foundations will want to be a part of whatever solutions are required to ameliorate the erosion of community services and to adapt not only to hard times but to changing times as well.



Stephen M. Dobbs

“ Wilmer Shields Rich would be delighted to see the number of foundations today that consider public accountability an important aspect of their work,” Council President James A. Joseph said. The Wilmer Shield Rich awards program is named for the dynamic woman who guided the creation of the Council on Foundations and became its first executive director in 1957. Throughout her life, Rich exhorted foundation directors and trustees to communicate more openly about the resources and activities of their philanthropies. She saw the tradition of secrecy surrounding many foundations as damaging to their reputations and detrimental to their ultimate goals.

The Wilmer Sheilds Rich Awards program emphasises that, by publishing annual reports, foundations and corporate givers can increase their public visibility and inform an ever-growing audience more effectively about their missions. Designed as more than a salute to “winners” and “also-rans,” the awards program serves as a showcase for the outstanding aspects of several different reports. Judges select the reports based on criteria including clarity of writing, design, presentation of information to grant-seekers and overall impact in communicating their organisations’ interests to their various constituencies.

*“...the award was pleasing because it was won from an international field. As a world first initiative, it is gratifying for us to receive such a prestigious award”.*

Two independent foundations honoured for their outstanding annual reports were the Josiah Macy, Jr. Foundation of New York City (\$10 million to under \$100 million in assets category); and The Commonwealth Fund, also of New York, (\$100 million and over in assets category). Community foundations honoured were the Maine Community Foundation, located in Ellsworth, Maine (under \$5 million to under \$20 million in assets category); and the Boston Foundation (\$20 million and over in assets category).

The annual report of the Boston Globe Foundation (under \$25 million in assets) received recognition in the corporate foundation/giving program category. The Victorian Health Promotion Foundation of Victoria, Victoria Province, Australia, was honoured in the operating foundation category.

The Council on Foundations is a non-profit association of over 1200 private, corporate and community foundations and corporate giving programs. Members of the Council contributed \$3.6 billion last year for programs in such fields as social welfare, health, education, the environment and the arts. The Council's primary objective is to promote responsible and effective grant-making.

Sir Gustav Nossal, Chairman of Vic Health said “the award was pleasing because it was won from an international field. As a world first initiative, it is gratifying for us to receive such a prestigious award”.



## Australian Foundation Wins Award

(Washington, D.C.) Seven foundations have been cited for producing excellent annual reports in the Eighth Annual Wilmer Shield Rich Awards program. The award recipients were honoured at the 42nd Annual Conference of the Council of Foundations in Chicago, Illinois in April. The awards program is sponsored by the Council on Foundations and the Communications Network in Philanthropy, and affinity group of the Council.

**philanthropy**

## Australian Association of Philanthropy AGM



Brian Burdekin, Human Rights Commissioner, Margaret McCaffrey and Ellen Koshland, Small Change Foundation.

Photos: Dale Mann/Retrospect

The Annual General Meeting of The Australian Association of Philanthropy was held on March 19th. Evan Walker, M.L.C. was the first speaker for the morning, following the election of a new council.

Presentations by a lively panel followed: Sandra Bardas, of the Greenhills Foundation, Louise Davis of IBM, Sydney, and John Sullivan from Perpetual Trustees.

The lunchtime speaker was Human Rights Commissioner, Brian Burdekin, who also launched Giving Australia.

AAP Council for 1991

President: Michael Liffman

Vice President: Jill Reichstein

Treasurer: Trevor Jacobs

Secretary: Lisa Trood, Gillian Bonham, Martin Carlson, Darvell M. Hutchinson, Rupert Myer, Ian L. Roach, Judy Whiteman



Rupert Myer, The Myer Foundation, Jill Reichstein, The Lance Reichstein Foundation, Dr. Jane Gilmore, The Holmes A Court Foundation, Sandra Bardas, Greenhills Foundation



Judy Whiteman, Victorian Women's Trust  
Hass Dellal, Australian Bicentennial Multicultural Foundation.



Elizabeth Cham, ANZET,  
Jane Sandilands, Editor *Philanthropy*,  
Pat Feilman, The Ian Potter Foundation.

## Women in Philanthropy Network

This group has been meeting occasionally and informally over the past twelve months to exchange contacts, expertise and information around the issues related to women in philanthropy.

Those involved are either: working with trusts and foundations; in the corporate giving sector; or individual philanthropists.

“Women in Philanthropy” has recently detailed its purposes and future plans and members of the philanthropic sector will be contacted in the near future with more information and invited to participate in the work of the group.

For further information, contact any of the following:

Genevieve Timmons- The Lance Reichstein Foundation

Fiona Moore- The Stegley Foundation

Jenny Florence- The Victorian Womens' Trust.

## Coming Events

### *Proposed Program*

The following program has been approved by Council and is subject to venue and speakers being finalised.

#### AUGUST

Breakfast Meeting Topic: Corporates in Philanthropy - the Coles Myer School Computer Project.

(The first of monthly breakfast meetings to be held on the second Friday morning of each month).

Grant-seekers Workshop (1): Applying to trusts and foundations.

#### SEPTEMBER

Breakfast Meeting Topic: Philanthropy in the rag trade - the Esprit Experience.

Best Practice Forum (1): Computerisation and trust administration.

Grant-seekers Workshop (2): Accountability for grant-seekers

#### OCTOBER

Breakfast Meeting Topic: The Potter Farm Project.

Best Practice Forum (2): The art and science of application procedures.

#### NOVEMBER

Breakfast Meeting Topic: Corporate philanthropy: A new twist - the MacDonalds experience.

Best Practice Forum (3): Guide to informed giving - establishing foundations.

#### DECEMBER

Breakfast Meeting Topic: Outlook '92 - three sector views.  
World Congress: Florida, USA.

#### FEBRUARY

Breakfast Meeting Topic: World Congress Round-up.

Best Practice Forum (4): Financial accounting systems for trust administration.

Sydney Workshop: Focus on corporate giving and philanthropy.

#### MARCH

Breakfast Meeting Topic: The recession and beyond.

Grant-seekers Workshop (3): Monitoring and evaluation strategies.

#### APRIL

Breakfast Meeting Topic: Philanthropy in arts and education.  
Annual Dinner and AGM: Innovative Project Award.

#### MAY

Breakfast Meeting Topic: Breaking new ground in the community service sector - the role of trusts and foundations.

Best Practice Forum (4): Annual reporting procedures.

Grant-seekers Workshop (4): Reporting back functions.

#### JUNE

Breakfast Meeting Topic: Charitable giving - what role for professional fundraisers.

Planning Workshop: Setting an annual theme for the AAP.

## World Congress on Philanthropy

#### Venue:

Doral Resort, Miami, Florida USA.

#### Dates:

5-8 December, 1991

#### Registration Fee:

US \$450 until 1st September  
and US \$500 thereafter.

#### Keynote speakers:

Liv Ullman

Actor, Goodwill Ambassador for Unicef;  
Vice President, International Rescue Committee.

Sir Paul Reeves

Anglican Communion Representative to the United Nations;  
Former Governor General of New Zealand.

#### Contact:

The World Congress on Philanthropy  
Educational Foundation.

1145 19th St, N.W, Suite 201

Washington, DC 20036-3701, USA

Tel: 0011-1-703-6830000 Fax: 0011-1-703-6833834

Please advise the A.A.P office on 614 1491 if you or your organisation will be attending. An Australian delegation will be convened prior to departure and an opportunity provided on return for experiences gained at the Congress to be shared.

## Advertising in Philanthropy

Enquiries about advertising rates should be directed to:

*The Australian Association of Philanthropy*

8th Floor, 20 Queen St,  
Melbourne, Vic, 3000  
Phone: (03) 614 1491  
Fax: (03) 614 8471

# Effective Trusteeship:

## Issues for Creative Philanthropists

By Dawn Wong, published by the Law Foundation of NSW, reviewed by Michael Liffman for Philanthropy.

It has been a longstanding lament of mine that philanthropy in Australia lags so dramatically behind the philanthropic sector in the United States. Philanthropy in Australia remains underdeveloped, not only in its scale and its vision, but also simply in the application of professionalism to its management and implementation.

This publication both confirms that impression and goes some way towards redressing it. Dawn Wong, Assistant Director of the Law Foundation of New South Wales, spent two months in North America last year, and has produced this report of her study tour.

The report's title is an excellent and apt one: Effective Trusteeship: Issues for Creative Philanthropists. In its 100 or so pages, the report comprehensively and sensibly traverses much of the basic territory which needs to be covered if the various participants in the work of philanthropic foundations, i.e. boards, trustees, staff and grant recipients, are to apply sensible, informed and workmanlike approaches to the conduct of their business.

Chapter 1 starts at the beginning of the process of grant-making and discusses the importance of communication, and the steps to be taken in the assessment of applications. A final section of Chapter 1 deals with monitoring and draws the useful distinction, which is then further developed in the second chapter, between monitoring and evaluation.

Monitoring involves the gathering of information from grant recipients to make sure they are doing what they said they were going to do in their application. Evaluation examines how things were done, and, more importantly, what the actual impact of the work done was and what it achieved in terms of the program's objectives.

A range of difficulties, partly associated with the amount of time and funds needed to monitor effectively, and partly arising out of the methodology of monitoring, and the dynamics of the relationship between grant-makers and grant-seekers, are identified and some of them discussed. Some basic and practical procedures are described, such as the use of a grant payment schedule, and of status reports, and the potential value of a computerised grants management program. These procedures are fundamental to the monitoring of grants.

Evaluation is a higher order of monitoring and relates partially to the need for accountability in grant-making and partially to the need to gain knowledge and understanding of the value of the activity funded by a grant. There is vast literature on the evaluation of social programs and public policy, some of which is fundamental to evaluation in the philanthropic sector. Additionally, there are particular aspects

of evaluation which relate directly to the context of the philanthropic transaction.

Dawn Wong has drawn on some of this literature and has provided a useful reading guide based on it. In addition, she has spoken to many grant administrators in the United States and incorporated some valuable insights and hints.

(In a useful Appendix, the report quotes Robert Bothwell in identifying 17 pitfalls to be avoided in embarking on evaluations in the context of grant-making.)

Subsequent chapters of this report talk about the role of both trustees and professional staff. The report stresses the need to ensure that trustees are committed, informed, enthusiastic and appropriately detached in the conduct of their stewardship of philanthropic funds. The chapter on the role of professional staff stresses the need to regard the work of foundations as being of a level of responsibility and scope which justifies the employment of appropriately educated, skilled and sophisticated staff no less than in any other area of community affairs. These are both areas in which Australia still has a long way to go.

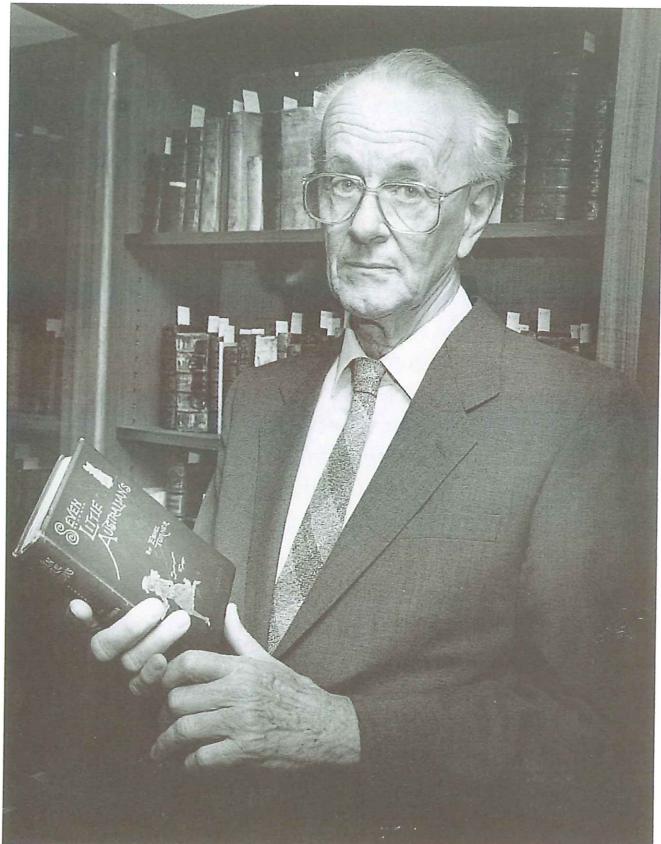
While this report, therefore, reminds us of what still needs to be achieved in Australia, and of the relatively few foundations which measure up to the standards which are called for, it is, at the same time, reassuring to realise that there is little described in this report that cannot be understood and achieved by local foundations, and indeed, not much which would be entirely new or intimidating to the more advanced of the foundations which do exist in Australia. The obstacles to the philanthropic sector in Australia to reaching the levels of performance suggested here are not ones which cannot be overcome with a little more determination and commitment, and possibly a more confident and visionary view of the role foundations can - and, indeed, in these changing times, must - play in our society.

Dawn Wong's report is, of course, not the complete or final word in this area. It is a comprehensive, but in some ways, a fairly basic primer. It does not seek to describe and analyse the overall pattern of foundation activity in the United States or in Australia. Nor does it explore the important issue of various forms of dynamic which are inherent in the relationship between grant-makers and grant-seekers and some of the more subtle ethical issues which arise in that relationship. As the literature and the level of communication within the philanthropic sector grows, so too will opportunities for this sort of discussion - although it may still be a long time before Australia can boast a fortnightly journal such as the outstanding *The Chronicle of Philanthropy* in the United States.

The Law Foundation of New South Wales, and Dawn Wong, are to be commended on the production of this report.

Effective Trusteeship is available for \$25 plus \$3 handling & postage from The Australian Association of Philanthropy, 8th Floor, 20 Queen St, Melbourne, Vic, 3000, ph: (03) 614 1491.

# At Home & Abroad



Lindsay Shaw, benefactor to Monash University Library.

Photo by Richard Crompton

**Lindsay Shaw has been collecting Australian literature since the 1970s. He writes for Philanthropy about the works he has collected over the years, many of which have been donated to the Monash University Library. A further collection is awaiting donation to the National Library of Beijing.**

Collecting Australian children's books is part of collecting Australian literature.

I began collecting Australian literature in a methodical way in the early 1970s after reading a letter to the editor of *The Age* by the late A.A. Phillips. In the letter he responded to a question from another correspondent who asked which books might form the basis for a reading list to cover a representative range of Australian fiction.

I subsequently bought a copy of Grahame Johnston's *Annals of Australian Literature* (1970) and used it as a guide to collecting.

When the collection had grown to some thirty books, it was outgrowing the storage capacity of a suburban home also housing two adults and three children. I imagined that all Australian institutional libraries would already hold similar collections, so I spoke to Geoffrey Blainey, then Chairman of the Australia-China Council, who later acquired the collection for an agreed modest sum, and it was presented to the National Library in Beijing. I have since accumulated a further 1,200 volumes which I am waiting to donate to the National Library in Beijing when international conditions allow.

*In 1983 my collection had reached some 1,000 Australian children's books and I offered these...to the Monash Library as the basis of a research collection.*

A request by a friend to look out for books by Mary Grant Bruce to fill gaps in his daughter's collection led me to form a collection not only of her books, but also of Ethel Turner, and subsequently of Australian children's books in general. Marcie Muir's *Bibliography* provided an indispensable collecting framework, and still does. The next volume to be published later this year will be a valuable addition as well as Kerry White's bibliography, which will carry the work from 1973 to 1988.

I presented the Mary Grant Bruce and Ethel Turner books to the Monash University Library with the consent of the (then) University Librarian, Brian Southwell, as it was a field unlikely to have priority in the expenditure of the Library's limited resources.

In 1983 my collection had reached some 1,100 Australian children's books and I offered these to Mr Southwell for the Monash Library as the basis of a research collection. I have managed to add several hundred volumes a year to the collection since 1983.

When reading John Ewer's *Creative Writing in Australia*, I was impressed by the chapter on The Novel in the 'Thirties. Even today reference is made to the social situation and the social attitudes of the '30s. Much might be reflected in the novels of the time. I decided to try and fill gaps in the Monash collection of Australian fiction of that period, and slowly managed to supply a few hundred titles. In this, Monash Library has taken precedence over the National Library in Beijing. I have not yet, for instance, acquired a second copy of Banjo Paterson's novel *The Shearer's Colt* for Beijing. My copy of Dal Stivens' first collection of short stories *The Tramp* (1936), a scarce item today, is still with me, as is a set of Arthur Upfield's novels, awaiting placement.

## THE COLLECTION

Merete Smith is Acting Rare Books Librarian, Monash

University Library. She writes here about what it means to a library to have a benefactor such as Lindsay Shaw.

Monash University Library is very lucky to have a benefactor like Mr. Lindsay Shaw. Lindsay Shaw has a long standing connection with Monash University. He has held various positions there, lastly before his retirement, he was secretary of the Faculty of Education. Lindsay Shaw is also a member of the Friends of Monash University Library, an organisation for people with an interest in the well-being of the Library.

In 1983 Lindsay Shaw made his first donation of books to the Monash University Library, starting what is now known as the Lindsay Shaw Collection of Australian Children's Books. He has made many further donations since then and this magnificent collection at present numbers nearly 6,000 titles. Apart from the Australian children's material, Lindsay Shaw has also donated general Australian literature, literature from the 1930s, and an important collection of Walter de la Mare material.

The Lindsay Shaw Collection of Australian Children's Books is on the way to becoming one of the greatest collections of children's books in Australia.

Many of the obvious children's classics are in the collection, such as early editions of books by Ethel and Lillian Turner, Mary Grant Bruce and May Gibbs. These books belong in any adequate collection of Australian children's books but what makes Lindsay Shaw's collection so special is the material which is little known because it never became famous in its time.

*...what makes Lindsay Shaw's collection so special is the material which is little known because it never became famous in its time.*

An example of such an elusive publication is *Penny Wock's and Donald Duck's Adventures in Jungleland: A Fairy Story*, published around 1922.

This book does not appear in the standard bibliography of children's books or any other bibliographies. The little story and the illustrations were done by two young Geelong girls. Cicily Wilson wrote the text and the illustrations are by Jean Moreton. This charming little book predates Walt Disney's Donald Duck which did not appear until 1934.

Another elusive publication is *A Year at Sunbury*, written early in the 20th century by an anonymous author. It is not a story of high literary quality but is a document of its time. It concerns Sunbury College near Melbourne and glorifies the English Public School tradition as found in a Melbourne boys' school. The book follows three boys in their final year at Sunbury and is a celebration of cricket, companionship and stiff upper lips.

Material of this kind may not necessarily be expensive to acquire, but it is time consuming and labourious to collect, depending on in-depth knowledge of the area, hard work and dedication. In developing the collection, Lindsay Shaw has consulted booksellers catalogues from all over Australia, visited antiquarian booksellers, opportunity shops, markets and school fetes.

#### WHAT SUCH DONATIONS DO FOR THE UNIVERSITY AND THE LIBRARY

Without Lindsay Shaw's donation it is unlikely that Monash University Library would have gained an important collection of children's books.

*philanthropy*

The Lindsay Shaw Collection of Australian Children's Books is intended as a research collection and has consequently been developed to represent as fully as possible Marcie Muir's standard bibliography of this area. In the few years in which the collection has existed at Monash, it has supported research by Brenda Niall, Reader in the English Department at Monash, for her books *Seven Little Billabongs* (1979) about Ethel and Lillian Turner and *Australia through the Looking Glass* (1884), a general survey about Australian children's literature.

*The story and illustrations of Penny Wock's and Donald Duck's Adventure in Jungleland: A Fairy Story, were done by two young Geelong girls....This charming little book predates Walt Disney's Donald Duck which did not appear until 1934.*

Collections of the nature of the Lindsay Shaw Collection of Australian Children's Books exist for the future as much for the present. A library is created by the books held in it, and scholars are attracted to libraries with important collections. The Lindsay Shaw Collection of Australian Children's Books is well on the way towards a quality which may attract future postgraduate students and established scholars to Monash University.

As a small token of our thanks, The Friends of Monash University Library has made Lindsay Shaw a life member. Also, an exhibition of some of the material in the collection serves as a tribute to our most generous donor as well as being an advertisement for the Library and the University. The exhibition has generated much interest and several small donations of Australian children's books to the Library.

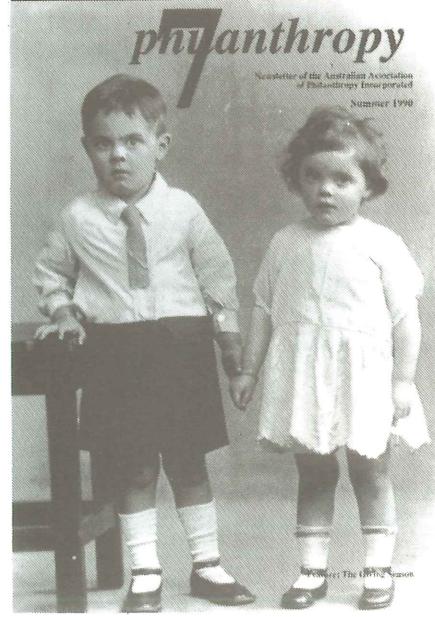
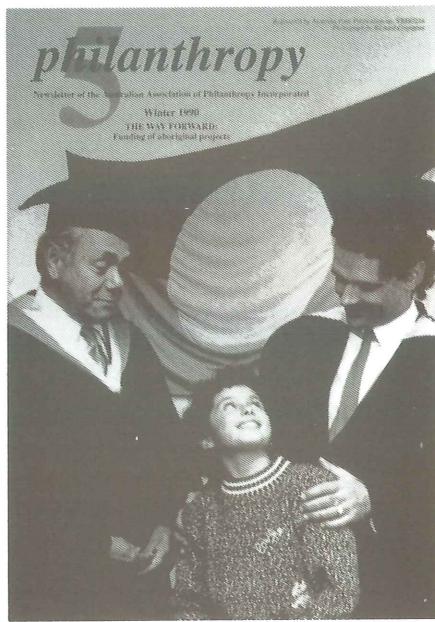
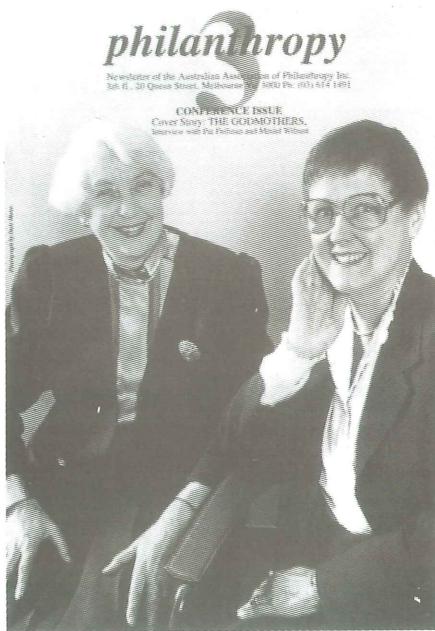
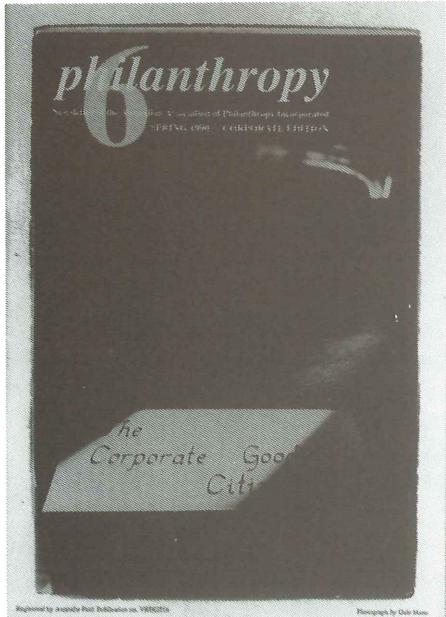
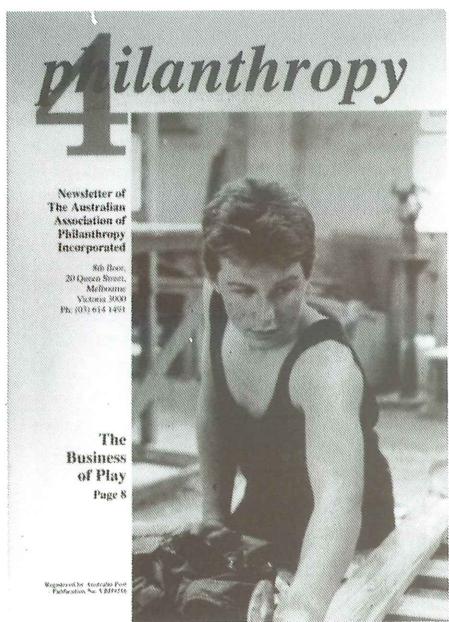
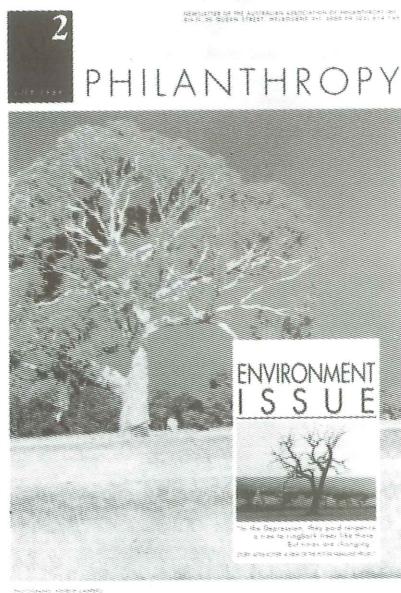
The Friends of Monash University Library is an organisation which holds meetings and lectures for its members approximately every other month. Members not normally eligible for borrowing also qualify for reduced borrowing rates.

Donations of material to the Monash University Library may be given under the Tax Incentives Scheme.



The Magic Pudding

# subscription 28



## Subscriptions to Philanthropy Now Available

The Association's lively and informative quarterly journal, *Philanthropy*, is essential reading for trust and foundation administrators, trustees, individual philanthropists, fundraisers and the grantseeking community, as well as those interested in the activities of the philanthropic world.

Topics covered in previous issues include:

- Initiatives in funding of environment projects.
- Personal profiles of significant people in philanthropy.
- Extensive coverage of the first national conference on philanthropy.
- Feature article on small business and philanthropy working together.
- Corporate involvement in philanthropy.
- The beginnings of two Western Victoria foundations.
- The role of Trustees.

For non-members, subscription to *Philanthropy* is \$20 per annum, post paid. (Back issues of Nos. 2-7 inclusive are available for \$5 per copy).

### Subscription Form

I wish to subscribe to the Association's quarterly publication, *Philanthropy*, at \$20 per annum, post paid.

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Philanthropy Inc.  
8th Floor, 20 Queen Street  
Melbourne Vic 3000

# *the australian association of philanthropy*

## ***The History of the Association***

The Association was formed as a national body in 1975 to represent the shared interests of trusts and foundations and to represent philanthropy to government and the community. The establishment of a permanent secretariat in 1988 was a further indication of the Association's intention to be a strong professional organisation representing both large and small trusts and foundations from both the private and corporate sectors.

## ***What the Association does***

The Association offers a range of programs and services which reflects the diverse interests and needs of its members. Specific activities include:

- Provision of information to members and the broader philanthropic sector through a quarterly magazine.
- A growing resource library of local and overseas information which is available to members, potential philanthropists and the community sector.
- Regular discussion groups/workshops for members on issues relevant to philanthropy or trust operations.
- Assistance to individuals and corporations planning to set up trusts and foundations.
- General assistance through information services to applicants for grants.
- Research into areas relevant to the philanthropic sector.
- Monitoring legislative activity.
- Communicating to the general public about the philanthropic world.

## ***Statement of Purpose***

To advance and protect the common interest of private and corporate philanthropy in Australia.

To scrutinise any proposed Federal or State legislation likely to affect private or corporate philanthropy and to take such action as the Association may think is desirable.

To foster co-operation between philanthropic trusts, individual and corporate donors throughout Australia.

To encourage and facilitate exchange of information between the members on the understanding that where appropriate it will be regarded as confidential.

To improve communication and understanding between the members of the Association and the community at large.

To assist in the identification of areas of need in the community.

To develop and maintain contact with similar overseas bodies.

To inform members of trends and developments on issues relevant to philanthropy as a result of local or overseas research.

To act as a general service organisation for members in ways which they may require.

To seek and consider suggestions from members of the Association and other interested bodies for the advancement of philanthropy.

## ***Members of the Australian Association of Philanthropy***

ANZ Executors & Trustee Co Ltd  
Coles Myer Ltd  
Helen M Schutt Trust  
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L E W Carty Charitable Fund  
Lord Mayor's Fund  
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