

# philanthropy 11

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OUR THANKS TO THEM

# Contents

<b>EDITORIAL</b>	1
<b>REPORTS</b>	
Victorian Community Foundation	2
ANZ and Philanthropy	3
The Australian Academy of Science <i>Publishing Texts to Inspire Secondary Students</i>	5
Royal Melbourne Hospital <i>Contributing to Health with the help of Philanthropy</i>	8
<b>FEATURE - THE RURAL DOWNTURN</b>	
Coping with Stress <i>A Rural Initiative</i>	10
The Lance Reichstein Foundation <i>Looks at the Rural Recession</i>	11
<b>SPECIAL FEATURE</b>	
Applying to Charitable Trusts <i>How to be Successful</i>	14
<b>INTERNATIONAL PHILANTHROPY</b>	
Philanthropy in the US <i>An Australian Perspective</i>	20
Japanese Philanthropy	23
<b>PHILANTHROPY NEWS</b>	
The Living Past	25
Review of AAP Membership	26
International Study Tour	26
<b>BOOKS AND PUBLICATIONS</b>	
Planning for Sustainable Farming	27
Effective Trusteeship - Issues for Creative Philanthropists	27
Successful Submission Writing for Business and Non-Profit Organisations	27
<b>SUBSCRIPTION FORM</b>	28

# Cover Note

## Cover Photographs

The covers of this issue of Philanthropy show two successive editions of a valuable initiative. Their purpose is to help country people cope with the stress created by the current rural downturn.

The story is covered within our feature on the rural downturn, but the covers are reproduced here to portray one of the best outcomes from the involvement of a private Trust or Foundation, namely the take-up of a good idea by a larger sponsor.

In this case, you will note the front page insert acknowledges the contribution of the Felton Bequest Committee, which made the initial production possible. On the back cover, a recent reprint of 100,000 was taken up and funded by the Department of Community Services, Housing and Health.

## Disclaimer

Opinions expressed in this magazine do not necessarily reflect those of the Australian Association of Philanthropy Inc.

# Editorial

The Australian Association of Philanthropy exists to promote more effective giving in Australia. Its members include private Trusts, Trustee companies with charitable trusts and corporations with community-giving policies or their own Foundations.

Neil Thorsen, the Chairman of our counterpart Association in New Zealand, recently visited Australia. He made the very telling comment, "In a city of more than 3 million like Melbourne, there should be more people willing to become philanthropists." How true!

Neil is also Manager of Charitable Trusts within Guardian Trustees company, which will have the administration of the recently launched Community Welfare Foundation.

The Association's charter has a three-pronged approach for 1992: to promote more effective corporate giving, to reach out to more individuals who might be prepared to consider establishing a charitable Trust or Foundation, and to encourage more effective partnerships in philanthropy between those agencies identifying needs and the Trusts and Corporations prepared to co-invest in their solutions.

The Association's recent workshop "How to approach Trusts and Foundations", quickly developed into two sittings with over 130 enrolments.

We are grateful to Genevieve Timmons from the Lance Reichstein Trust, John Sullivan from Perpetual Trustees and Lisa Trood from the Victorian Health Promotion Foundation for providing frank and valuable insights into the business of making successful applications - from the grant-makers' perspectives.



The main messages conveyed on the day were that each Trust is different and requires researching, that monies provided are not donations but investments in a solution, and that a major component of success when approaching Trusts is appropriate and effective communication. The excellent article by Hugh Frazer from the Northern Ireland Voluntary Board in this issue shows these principles are not restricted to Australia.

One other emerging issue among Corporate programs is the reassessment of the policy of giving "\$300 to the established list" to a more results-oriented approach. In some instances, Corporations are beginning to apply the management principles which made them successful within their own business to their approach to community giving. The result is a more focussed attempt to identify issues and those appropriate solutions worth supporting.

The Association is pleased to welcome a new member, The Telematics Course Development Fund Trust.

It only remains for me to bemoan the fact that many of our readers completely missed the point of the cover of the last issue of *philanthropy*. No, it was not simply a plug for the Salvation Army, however worthy their cause, it was a replica of a McDonald's paper tablemat - minus the details of who to call to volunteer for the Red Shield appeal. And yes, two million people had a chance to see it.

Max Dumais

# First Victorian Community Foundation Awards

A man who has worked with the elderly for 16 years and a program which helps people with the Court system are the winners of the inaugural Victorian Community Foundation Awards for Service in the Community.

Mr Frank Di Blasi received the Individual award for his work, which has concentrated on the Italian community. He is Director of Aged Services with the Italian Assistance Association and established 58 of the 64 Senior Italian Citizens Clubs - which have over 10,000 members in Victoria.

Mr Di Blasi's innovative ideas in promoting harmonious community relations between migrants and local governments have been adopted by the Polish, Hispanic, Dutch and other ethnic groups.

The Organisations category award went to the Victorian Court Information and Welfare Network Incorporated and was accepted by its President, Ms Fleur Spitzer. A small team of professionals supported by 200 volunteers provided 25,000 people with assistance in the twelve months to June, 1990. As the first organisation of this kind in the world, it has been widely studied and duplicated.

Support from the Network is non-partisan, non-judgemental and non-legal. It is offered to all categories of people going to Court, including victims, witnesses, defendants, accused, family and friends.

The Victorian Community Foundation began in 1983 as a perpetual charitable trust which provides a 'pooling', and therefore much more effective administration of bequests and donations. Trustee to the Foundation is ANZ Trustees.

Mr David Gibbs, Chairman of ANZ Trustees, said at the presentation that the Foundation's aim was to benefit the community through an effective and responsible administration of bequests and donations. The Foundation has an Advisory Committee that acts voluntarily and oversees the operation of the Trusts set up under the umbrella of the Victorian Community Foundation.

The Awards were presented by Mr Christopher Thomas, Chairman of the Advisory Committee. He said their aim was to encourage and recognise philanthropic endeavours within all sections of the community. He also announced that the Awards would become an annual event in three categories - Individual, Organisational and Corporate.



*Victorian Community Foundation Awards Presentation (from left), Christopher Thomas, Chairman of the Foundation; Fleur Spitzer; Frank and Mrs. Di Blasi; David Gibbs, Chairman, ANZ Trustees; and Melda Donnelly, Managing Director, ANZ Trustees*

# ANZ and Philanthropy

ANZ has a long-standing reputation as a provider of philanthropic funding to a range of organisations. Commercial success for any company is dependent on a number of factors, not the least of which is community support.

ANZ recognises this and in turn provides assistance to the community that supports it through direct philanthropic donations. There is a clear distinction between ANZ's sponsorship and philanthropic programs, and the two have distinct aims.

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Through its philanthropic program, ANZ undertakes to provide donations to service institutions, charitable organisations, special projects and other causes that serve the communities in which ANZ operates and participates worldwide.

ANZ's Australian Philanthropic program covers a number of different areas:

## Health and Medical

Support is usually provided in the health and medical areas for projects relating to improved treatment for major illness, boosting of research in specific areas of concern and funding projects that maintain and promote the health of our society.

Current recipients include the Royal Melbourne Children's Hospital, where the ANZ Cardiac Surgery Unit has been built and is due to open this year. It will be the first surgery unit specially designed for paediatric cardiac surgery in the Hospital.

ANZ also provided support to the Mater Mother's Hospital's New Life Centre in Brisbane, where the ANZ Delivery Suite is now in operation.



*ANZ Deputy Chairman & Group Chief Executive, Will Bailey, with a patient of the Mater Mothers' Hospital, Brisbane*

## Community and Social

Donations to community and social projects include regular donations to, amongst others, the Salvation Army to boost its work in caring for the many needy and underprivileged people in our community, and the Royal Flying Doctor Service's Aircraft Replacement Appeal.

## Education

ANZ supports the field of education to actively participate in the provision of, and to help create the climate for, continued and improved educational facilities and programs.

Recipients of this support are generally tertiary institutions, especially programs in the fields of business and economics.

*(Continued overleaf)*

### **Environment and Conservation**

Environmental projects that receive assistance are those designed to protect and revitalise the ecology of our planet, country or local community. ANZ has also provided funding to a wide range of restoration appeals. Recently a donation was provided to the National Trust of Australia (Tasmania) to aid the restoration of historic Bishopscourt in Hobart

### **Science Science and Technology**

ANZ has provided funding for research, development training and technology; to assist the creation and maintenance of a healthy environment, and for the progress of industry and technology. Recipients have included the Australian Institute of Mining and Metallurgy.

During times of special community need, such as natural or man-made disasters, ANZ will make donations such as that made to the Newcastle Earthquake Emergency Relief Fund. In addition to ANZ's donation to the fund, the Bank's branch network was used for the collection of further donations from the public.

Prior to a donation being approved, the project or organisation is assessed according to strict criteria that reflect the nature of ANZ's business operations and the scope of its representation.

Preference is given to organisations with small overhead or administrative costs so, the impact of the donation is not depleted.

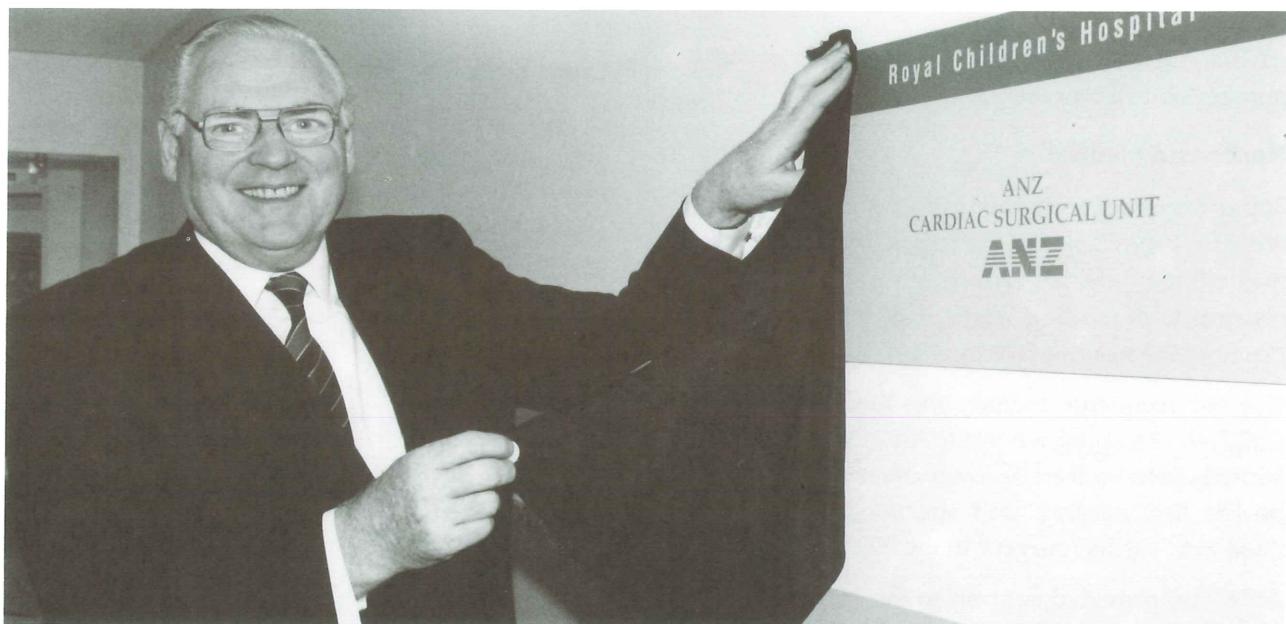
In certain cases, ANZ also considers providing "in kind" support in the form of:

- donation to charity auctions
- use of ANZ premises and facilities for fundraising
- staff volunteers
- management or specialist advice and assistance
- provision of ANZ goods and chattels

For further information contact:

**Ms Jeannette McLoughlin**  
ANZ Group Public Affairs

Telephone: (03) 658 2955



ANZ Executive Director, Mr Brian Weeks at the Royal Children's Hospital, Melbourne

# The Australian Academy of Science

## Publishing Texts to Inspire Secondary Students



Dr Jim Peacock, Chairman of the Project Committee, launches Part 1 of *Biology: The Common Threads* at the Australian Science Teachers Association National Conference in Alice Springs

The Australian Academy of Science is an independent organisation established in 1954 by Royal Charter. It's made up of about 260 Fellows elected for their distinguished contributions in the physical and biological sciences. The Academy is also widely recognised as a publisher of high-quality textbooks for senior secondary students.

The Academy's goal is to produce high-quality, up-to-date and scientifically accurate textbooks that students will find appealing and engrossing.

To date, it has been able to do so with the generous support of the Sidney Myer Fund, the Ian Potter Foundation and the corporate and government sectors. The Academy's hope is that its texts will inspire students to learn about and appreciate the wonder and excitement of science, and in turn, enable them to deal more constructively with both the human and natural environments as they become adults.

In 1967, the Academy released its first text, *Biological Sciences: The Web of Life*, which is now in its third edition. Since then, it has published texts, teacher resource books and student workbooks in the fields of geology, chemistry, mathematics and health education.

In a survey conducted in 1988, the Academy found that teachers wanted a new approach to teaching biology, based on recent developments in the field. In response, the Academy set up a committee to initiate a project to cater for their needs.

Dr Jim Peacock FTS FAA FRS, chief of the CSIRO Division of Plant Industry in Canberra and one of Australia's most eminent plant molecular biologists, chaired the project committee.

The committee included Fellows of the Academy and other experts in biology, as well as educational representatives.

(Continued overleaf)

The manager of the project was Ms Ruth Dircks OAM, a former biology teacher and curriculum adviser to the NSW Department of Education and until recently, president of the Australian Science Teachers Association.

The outcome of the project is the textbook, *Biology: The Common Threads*. The information in it has been provided by more than 125 scientists around Australia.

The contributors come from several Australian and overseas universities, numerous CSIRO divisions, state and Commonwealth government departments, the Murray-Darling Freshwater Research Centre, the Australian Institute of Aboriginal Studies, the Walter and Eliza Hall Institute of Medical Research, Westmead Hospital, Ego Pharmaceuticals, the Royal Botanic Gardens, the Children's Medical Research Centre in Sydney, the Australian Institute of Sport, the Queen Elizabeth Hospital in Adelaide, the Royal Melbourne Zoological Gardens, and other institutions.

They include doctors, botanists, nutritionists, ecologists, foresters, anthropologists, entomologists, veterinarians, pharmaceutical chemists, ornithologists, water researchers, soil scientists, biotechnologists and many others.

The draft material was reworked by professional writers into lively and engrossing text specifically for senior secondary students, and returned to the original contributors for checking to ensure its accuracy.

The material was then reviewed by other experts in both science and education, and the pilot version was sent to teachers in Victoria, Western Australia, New

South Wales and Queensland for assessment and criticism. Their suggestions were incorporated into the final text.

Part 1 of *Biology: The Common Threads* was launched in Alice Springs in July and released in October 1990, and Part 2 was released in September this year. A teachers' resource book and student workbook accompanies each part. Part 1 had to be reprinted within six weeks of its release, and Part 2 is also selling very well.

The covers use brilliantly vivid images obtained from Real-Time Colour Imaging on a scanning electron microscope, courtesy of the CSIRO Division of Forest Products.

Part 1 features the hairs on the forelimb of a bee in vibrant red against a blue background. Part 2 shows the bright orange, starlike hair structures on the surface of a leaf from a small evergreen shrub found in Western Australia.



Ruth Dircks (right), Project Director, discusses her role in developing *Biology: The Common Threads* with interested teachers

In her review of Part 1 of *Threads*, Janette Griffin wrote in *Search*: "It is wonderful to have information written for students about scientific developments which are occurring now.

The book is beautifully presented: the layout is clear and uncluttered with magnificent illustrations and excellent photographs and electron micrographs. The arrangement of sections is also excellent, with questions as headings to draw the reader on to find the answers. The boxed information allows extension for those who wish it."

Science journalist Graeme O'Neill commented: "One is struck by the number of times in the text when the author admits that knowledge of a particular phenomenon is still incomplete, even rudimentary. This is a radical departure from the flawless certainties represented in textbooks of the past, and is a tacit challenge to would-be scientists to enter a field that is still rich with opportunities."

In summary, he said, "*Biology: The Common Threads* makes strong claims to be the world's best biology textbook for secondary students and is a quite superb gift from today's generation of Australian biologists to the next."

**"... is a quite superb gift from today's generation of Australian biologists to the next."**

A textbook that incorporates the knowledge and skills of so many scientists, writers and teachers is not a commercially viable proposition for the Australian market. The Academy was able to develop *Threads* only with the help of the scientists who unselfishly donated their time in preparing the draft materials, but equally important, with the generous financial support of the Sidney Myer Fund and the Ian Potter Foundation. Their grants covered the costs of editorial and project management, re-writing, copy editing, photo research, preparation of illustrations and typesetting.

The printing costs and overheads for the project are being borne by the Academy. *Biology: The Common Threads* is marketed directly to schools for under \$35 per part. Income from sales is used to produce a student newsletter, *Biology in Action*, distributed free of charge to teachers in class sets.

With the completion of *Threads*, the Academy has now turned its attention to the production of an environmental science text for senior secondary students.

This is an urgent need, as state, independent and Catholic education authorities are reassessing their curriculum requirements in this field.

Experts in environmental science have been approached to provide draft materials for the text, and approximately 60 per cent of the contributions have been received. The project director, Mr Roger Beckmann, is in the process of organising the material for professional rewriting for the senior secondary age group.

Corporate and government sponsors have to date provided \$174,000 of the \$255,000 subsidy required for development through the Australian Foundation for Science, the project management and fund-raising body established by the Academy in 1990. The Business Council of Australia has also been instrumental in assisting with fund-raising for this project.

Further information about the Australian Academy of Science, the Australian Foundation for Science, the Academy's textbooks and other Academy projects is available from:

**Dr Nancy Lane**  
**Development Officer**  
**Australian Academy of Science**  
**GPO Box 783**  
**Canberra ACT 2601**  
**Telephone: (06) 247 5330**  
**Fax: (06) 257 4620**

# The Royal Melbourne Hospital

## Contributing to Health with the Help of Philanthropy

The Royal Melbourne Hospital is Victoria's oldest and largest hospital. It has a long and distinguished history as a teaching hospital, providing undergraduate and post graduate training in all disciplines associated with the treatment and care of patients within the hospital. It is internationally renowned for its high standard of patient care and contribution to medical research.

The value of philanthropic support to the Royal Melbourne Hospital is immeasurable. More than 20 members of the Australian Association of Philanthropy donate to the Royal Melbourne Hospital and their support plays a vital role in helping to deliver our high-quality patient care.

In many instances, advances in research and expertise are dependent upon grants from philanthropic trusts and foundations. It is this type of support that enables many research projects to commence or continue, and enables the purchase of new equipment.

One such instance arose last year. By mid-1990, the Royal Melbourne Hospital had developed a stroke prevention, treatment and research program. This program aimed to identify patients at risk of stroke, to minimise the likelihood of a stroke occurring or the risk of a major stroke occurring in patients who had had a minor stroke, as well as reducing the degree of disability in patients who have suffered a stroke.

According to Associate Professor Robert Gibson of the Department of Radiology, "An integral part of this program demanded the availability of a colour Doppler ultrasound unit.

The Hospital had the expertise and the demand to launch the program, but not the funds to purchase the essential equipment to effect it."

The Board of Management decided to seek funding from philanthropic sources, particularly those with declared interests in preventative medicine.

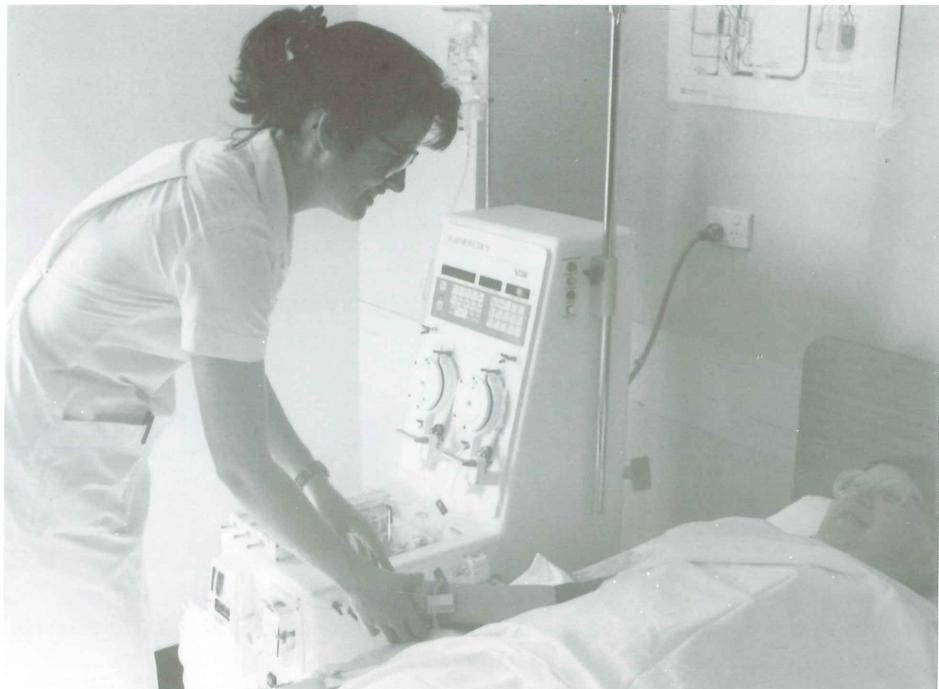
The Helen M. Schutt Trust responded promptly in December 1990 with the total cost of \$140,000, enabling the program to proceed immediately.

"Since its acquisition in January 1991 the colour Doppler ultrasound unit has contributed substantially to the hospital's stroke prevention and treatment program," said Dr. Stephen Davis, Head of the hospital's Stroke Service.

- In the 6 month period 1st February 1991 to 1st September, a total of 365 patients have been assessed by the program. These patients had either suffered a stroke or had indicative risk factors.
- A total of 353 ultrasound studies of the carotid arteries were performed during that period.



Professor Robert Gibson and Mr John Donlan of the Radiology Department show the colour Doppler ultrasound to Mr Darvell Hutchinson, Chairman, Helen M. Schutt Trust



A cancer patient at the Royal Melbourne Hospital undergoing stem cell treatment

From these only 54 patients were selected to undergo more detailed examination of the carotid arteries using angiography, prior to operation on the arteries. This represents a substantial benefit, not only for those patients who underwent an operation to reduce the risk of stroke, but also for the remaining 299 who could be reassured that they did not need carotid artery surgery.

"The stroke prevention and treatment program is playing a crucial role in reducing both the risk of stroke and the extent of disability resulting from strokes. In this way it plays a major role in tackling what is the commonest cause of chronic neurological disabilities in our community. The acquisition of the ultrasound unit now allows the hospital to offer safe, accurate and efficient assessment of patients at risk of stroke, in a way that is of maximum benefit to the individual and the community," he said.

Although advances in research and new technology are occurring at a lightning speed, philanthropic investments in the work of the hospital make a long term contribution to the expertise available to patients.

In 1985, a number of Trusts, corporations and private individuals contributed to the hospital's Haematology and Medical Oncology project which had a target of \$300,000 for equipment purchases. Among the contributors was the R.E.Ross Trust, as well as Perpetual Trustees on behalf of the Ethel Herman Charitable Trust and the H & L Hecht Trust.

A \$95,000 grant from the R.E.Ross Trust totally funded one item: a fluorescent flow cytometer and data acquisition system. After five years of

operation, this instrument still plays an integral part in the management of patients with leukaemia, cancer, AIDS and autoimmune diseases. It has also had a major role in advancing medical knowledge in areas of cancer, heart disease and lung disease.

A number of clinical trials and research projects involving the use of flow cytometry have been carried out or are currently underway. Current projects include studies of bone marrow stem cells, breast cancer, respiratory disease, blood grouping, and activated platelets in patients with heart disease.

Philanthropic support not only contributes to the hospital's expertise and ability to provide the best patient care, research and teaching, but is a direct investment in the health of the community.

**For further information contact:**

**Carole Rushford**  
**Manager Public Relations**  
**Royal Melbourne Hospital**  
**Telephone: (03) 342 7044**

# Coping with Stress

## A Rural Initiative

The cover of this issue of *philanthropy* provides an excellent example of how Trusts and Foundations can respond to the rural downturn and the crisis being felt by many on the land.

The first few hundred of this valuable stress management pamphlet was produced by Jan Adcock in conjunction with Women in Agriculture. They were used following the last rural crisis in the Mallee, with financial assistance from the Felton Bequest. The idea has been so well received that the Commonwealth government has enabled production of a further 100,000 for distribution throughout Australia.

The Rev Alan Dyall of Frontier Services, based in Carnarvon Western Australia, is distributing 'Coping with Stress' in the far-flung cattle stations of his 'Patrol Padre' round. Alan says, "At this stage I can identify 16 of the 89 stations I visit as people who might benefit from the stress leaflet, and I guess over the next 12 months there may well be many more."

The Rev Judy Archer of Rutherglen Uniting Church (North East Victoria) is organising the distribution of 2400 'Coping with Stress' brochures through the community-based Corowa and Rutherglen District Support network. Judy tells of the grief and sadness experienced when the All Saints Winery recently went into receivership; and of the loneliness of a Mallee farmer's wife who has moved to Rutherglen with her daughter to get work, so that her husband and son can survive on the wheat farm. Both husband and wife desperately need support says Judy, while they face ostracism and suspicion.

Don Turvie, coordinator of the Skillshare program at Mildura and District Education Centre (MADEC), is distributing brochures. Don reports that 800 families have left the land in the Mallee bordering the Sunraysia region in the past year, and that one third of the people in Sunraysia are on government welfare.

James Tanner of Mortlake (Western District, Victoria), reports that there is real evidence of people helping others in the rural economic downturn. As in the Ash Wednesday fires says James, the people who help you are those who themselves have suffered great loss.



Minister for Health, Housing and Community Services, Honourable Brian Howe hands over \$117,000 to John Hill from the Uniting Church

James also reports that in Mortlake the Anglican, Catholic and Uniting Churches have got together to address the needs of people suffering in the recession. Two seminars have been jointly organised, and one thousand 'Coping with Stress' pamphlets have been distributed with the local community newspaper, *The Mortlake Dispatch*.

This joint project of the Commonwealth Government National Better Health Program and the Uniting Church, is a multi-pronged approach of information-gathering and research, together with provision of community-based resources.

This article is reproduced courtesy of FURROWS, a Newsletter produced as part of this Rural ministry project. 'Coping with Stress in our Country Communities' pamphlets are available in bulk from the Rural Ministry Project.

### For more information contact:

John, Jenny or Neil  
130 Little Collins Street, Melbourne  
Telephone: (008) 136 747 or (03) 654 2488 ext 259.

# The Lance Reichstein Foundation

## Looks at the Rural Recession



The Lance Reichstein Charitable Foundation is involved in a number of endeavours to both monitor and assist the worsening situation in rural Victoria.

A Rural Support Worker quoted in a recent Reichstein position paper sums up the situation well: "In some ways, it's easier when there are fires or floods devastating rural communities, because the government and the community will respond quickly with emergency relief, policies and decisions to alleviate the situation. But the economic disaster which is currently sweeping across many parts of rural Victoria and Australia isn't as visible.

"It is not as well understood in its implications, and could continue to have devastating consequences for years to come if it's not recognised as an emergency."

Approximately 25% of Victoria's population live outside metropolitan Melbourne. Their experience of the current economic downturn will continue to be influenced by a number of factors including economic and political world events, federal and state government policy, public awareness and community

response; as well as the availability of resources, skills, information and support within their own communities.

It is essential for Trusts and Foundations to consider the allocation of their grants from an informed understanding of the rural sector.

This way they can give maximum support in ways which ensure both short and long term progress for all and assist

in rebuilding those rural areas currently suffering hardship.

The current downturn has not only brought rapid change, hardship and distress for many rural people; it has also exposed and compounded weaknesses and gaps in community services, social support and economic growth which have existed for many years.



Peter Mann - one of the highly skilled workers from the Karkana Day Centre in Horsham

(Continued overleaf)

According to the analysis currently underway within the Reichstein Foundation, funding from Foundations needs to be directed towards the following outcomes:

- Promotion of greater understanding of the needs and opportunities of rural communities - both within communities and across the state.
- Consolidation of information, support networks and exchange links within and between rural communities.
- Provision for skills development, training opportunities and support for leaders and change agents - whether individuals or organisations.

Some examples of the type of support required might include the following:

- Community outreach and networking activities on a local, regional and state level.
- Information exchange and newsletters.
- Leadership training and skills development.
- Advocacy initiatives.
- Welfare and community organisations taking a key role in linking and supporting the community.
- Research and consultations on a local and regional level.
- Development of a statewide knowledge base and framework.
- Projects which recognise need for emotional, social and financial assistance for people.
- Staged proposals requiring funding which allows for small beginnings over several years leading to larger, longer-term aims.

All areas of the state are experiencing changes, and in most cases, a reduction in social and community services because of reduced government spending.

Many commercial facilities and public utilities such as banking, health, education and local government services are also being reduced.

People are experiencing an increasing sense of isolation and decline in response to these diminishing services.

Existing volunteer or non-government services are faced with a growing demand for their services, although they too have diminishing resources, rising costs, and limited training and support to cope with the changing demands from people in distress and financial hardship. Staff in this situation need support themselves. Differences in emerging roles and responses according to gender have been noted. Women are frequently acknowledged as change agents and leaders, within both the family and the community.

They are often the first ones to recognise the need for action, to take it, to ask for emergency relief for the family, to negotiate with the bank to avoid foreclosure on the farm and to seek new skills in order to earn an income.



(From left) Marianne Parssuik and the Sale Arts Council took it upon themselves to do something about the 'doom and gloom' in their community and organised a festival



*Workers carrying out maintenance work on the Strawberry Crop*

In the community they are more frequently the catalyst for networking and organising activities which bring about community awareness and action.

Men face cultural barriers in coping with a personal crisis, and more frequently become isolated and resistant to change. They can talk about wool prices and the rural downturn in a group, but often don't relate the discussion to their own situations. They don't usually use personal relationships to share their anxiety, fears and grief at having to sell their farm or face bankruptcy.

There are currently few stories of prosperity and growth in rural Victoria, although people are responding to hardship with optimism and determination to manage the changes and demands being faced. The impact of the downturn has been felt in many ways - the experience being different for people depending on whether they're part of a farming community, a small or large town, or a provincial city.

This reference to several rural areas in Victoria illustrates the complexity and variety of factors which make the experience of the downturn different across the state:

**PYRAMID HILL - BOORT AREA:** Many farming families are working with degraded and barren soil which is badly affected by high salinity levels. Farming incomes are very low, and bank foreclosure is threatening non-viable farms.

**EAST GIPPSLAND AND SALE:** Changes in the industry base (for example, timber and electricity), the failure of the National Safety Council and the move away by Esso - both large employers - has substantially reduced employment opportunities. There have been floods in the Sale area, which have devastated areas of the farming district and towns. Many people in this area also had savings tied up in the Pyramid Building Society collapse.

**WIMMERA AND MALLEE AREAS:** These areas of broad-acre farming have experienced substantial losses due to the drop in world prices for wool, wheat and dairy products. The area has been affected by drought, late crops and the loss of this season's crop due to a virus infection.

While there are significant differences in the experience of people in the various parts of rural Victoria, there are also some common trends: individual and family experiences, local community or township experiences, and regional and statewide experiences.

It is around these areas that Trusts and Foundations could best begin to address their concerns.

**For further information, contact:**

**Genevieve Timmons**  
**Lance Reichtstein Charitable Foundation**  
**5th floor, 165 Flinders Lane**  
**Melbourne, Victoria 3000**

# Applying to Charitable Trusts

## How to be Successful

The Association wishes to assist its members to find valuable and appropriate causes to fund, and to ensure that grant-seekers are informed about what is expected from the point of view of the grant-makers. We seek to achieve this goal by producing the Directory, which broadly outlines the criteria under which people may apply.

A recent initiative has been the introduction of a workshop on 'How to approach Trusts and Foundations' which was first run on the 24th October. The response was so enthusiastic that the program had to be presented on two separate occasions.

There have already been overtures from other states and we are planning a similar program in Sydney in March and a further program in Melbourne in April.

For those who were unable to attend, we have reproduced the following article from *A Guide to The Major Trusts*, which is produced by the Directory of Social Change in the United Kingdom.

In these notes I want to give some broad hints on how best to approach trusts and what you can do to improve your chances of success. But before doing this, there are some general points which I believe are important:

- Trusts vary greatly, and there is no single formula that will guarantee success.
- Common sense and perseverance are essential qualities in approaching trusts.
- At all times you should be thinking of developing a partnership with trusts rather than begging for help.
- Believe in what you are doing. If you don't why should anyone else?

Just as trusts vary a lot, so do projects. Different projects and people will find different ways of selling themselves.

So adapt any points I make to suit yourself and your organisation.

### Preparation and Planning

The development of a successful organisation depends on good preparation and planning. This applies equally to successful fund-raising. If you spend time on proper planning, the other aspects of fund-raising will follow logically.

Trusts are only one source of funds. There are many others such as industry, events and legacies. Thus you should have an overall strategy for raising funds for your organisation, and fund-raising from trusts should be seen as one element in that strategy.

A fund-raising strategy should be an integral part of the strategy for the development of your organisation as a whole. Planning this involves a series of logical steps:

1. Clarify the *problem* or the *need* that is to be met.
2. Define the *aims* and *objectives* of the project.
3. Decide on the *methods* to achieve the aims.
4. Draw up short-term and long-term *plans*.
5. Prepare a financial *budget* (cost the plans).
6. Identify possible sources of *funds*.

It is a good idea to involve your whole organisation in this process as far as possible.

A useful preliminary exercise is to write down succinctly:

1. The problem or the need your organisation is concerned with.
2. The goals of your organisation.
3. How your organisation is trying to achieve these goals.

If you cannot do this succinctly it probably means there is some confusion in your thinking, and if you're confused about what you're doing, it won't be very easy to persuade others to support you.

Raising money, especially from trusts, can be a slow process, so start your efforts in good time.

Good planning will help to ensure you raise money when you need it. Don't make the mistake of waiting until you're in a crisis and then trying to raise money. This is all too common.

Decide what you're going to do and then raise money for that. Don't work the other way around. Too often I have found organisations doing projects because there is money available rather than doing the project they really want to do. This distorts the organisation's purpose and can lead to internal disagreements.

### Defining Your Project

It is important to have a good project to take to trusts. You should be clear about the need you are meeting and be able to state this clearly.

*Do not assume others will understand what the need is. Spell it out.*

In my experience most trusts prefer to support a specific project and they tend not to like contributing to on-going running costs or to topping up government grants.

If you are a large organisation, it can pay to break your work into convenient projects so that trusts have something to latch on to.

Many trusts like projects which are new, imaginative and innovative; however, this isn't always the case, especially with trusts with a very specific remit which may support the same organisation over a long period.

Often trusts like projects that will be monitored and which will produce reports. In this way others can benefit from the experience, or the success of the project might influence government policies. This process is an integral part of trusts being interested in new and pioneering work.

In defining your project remember that the project is the product you are selling. However well this product is packaged, you are only likely to be successful if it is a good project.

### Selecting Your Targets

There are very many trusts (some 2,400 are listed in the *Directory of Grant-Making Trusts*), and it is important to recognise that they do not form a homogeneous group.

Some are large, some are small; some are public, some are private; some creative, some are conservative; some take risks, some play safe; some employ staff, some do not. Only a few of them are likely to be interested in your work.

Thus it is important to research carefully into their policies, their size, and how they like to deal with applicants (where such information is available). This is vital if you're not going to waste a lot of time/money/paper in making pointless applications.

Your researches will lead you to discard most trusts. Of those remaining there will be two main categories. The first will comprise of a few large trusts with clear policies. The second will be a larger list of those that are worth a try but not worth spending too much time on. Your type of approach is likely to vary with each category.

Critical information to learn before approaching trusts includes the following:

- Their policies and priorities (where these are stated);
- Size of their grants;
- Who they have supported in your geographic area;
- Areas of interest;
- If they are accessible and who to contact, when they make decisions;
- If you know their staff or trustees.

Finding out the above information will enable you to identify that aspect of your work which might appeal to each trust.

*(Continued overleaf)*

You should then try and tailor your application as far as possible to meet the requirements of each trust. However don't distort what you're actually planning to do.

For those trusts that are just 'worth a try' it won't be worthwhile spending too much time on those applications.

Here you'll have to resort to what is in effect a circular mailing. You'll improve your chances very substantially if you personalise the letters by at least 'topping and tailing' the letter; that is, addressing each individually, having a personal salutation rather than a 'Dear Sir' and signing each letter personally.

### **Building Your Credibility**

As well as convincing the trust that your project is worthwhile and a priority, you must also convince them that your organisation is well-equipped to carry it out.

The process of establishing credibility involves publicising the work of your organisation and its track record. If you have a positive public image it is more likely that your organisation will have been heard of and you will receive sympathetic consideration. One of the first questions Trustees will ask is: Do I know this group or the people involved?

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If they haven't heard of a project, they may ask an adviser in the same area of the country as the project for their comments. Thus it is important to ensure as far as you can that trusts and their advisers have a favourable impression of your work.

For new and small organisations, particularly those operating in very run-down areas or undertaking some unappealing area of work, it is often difficult to establish credibility.

One way to tackle this problem is to provide evidence of support or references from reputable establishment figures such as the local clergy, or the director of the local council for voluntary service; to say how important your efforts are.

Most trusts will want evidence that your organisation has been properly set-up with a constitution and that it is a charity. In addition, it is a good idea to supply a list of people on the management committee and the range of expertise of its members.

Written documents also provide evidence of the merits of your organisation, so it is worth taking some trouble over producing your Annual report and accounts, as well as any other reports you produce. Also, make a point of collecting favourable comments about your organisation written by independent outsiders. Keep a file of articles and press-cuttings about your organisation and its work. These can then be produced or quoted from when you're trying to build your credibility.

### **Working Out Your Budget**

Trusts want to know what you need and for how long you need it. Too often, groups fail to spell this out and it's a symptom of poor planning. So prepare a budget and remember its preparation is an integral part of your planning process.

In preparing a budget remember the following points:

- (a) Allow for all your costs. If you forget a particular item, you will not have the money to pay for it.
- (b) Break your costs down into capital costs (equipment, premises, vehicles); and running costs like rent, telephone, salaries.
- (c) Estimate your costs realistically. Do research where necessary.

- (d) For long-term projects estimate your needs over time. Budget for how much you will need not just in the first year, but also in subsequent years. This will enable you to establish long-term plans for getting support for this project.
- (e) Make allowances for inflation. Remember that you'll be applying for next year's costs and you should not use current costs but allow for the current rate of inflation. For future years you'll need to make an estimate of how inflation will continue and it is best to state your assumptions.
- (f) Allow for a reasonable proportion of the overheads of the organisation when costing a project (such as rent, rates, phone, heat, stationery) except where you are applying for a specific item of equipment. Most trusts will accept this and be happy to contribute what seems a reasonable amount.

Quite often people under-cost their projects. If you apply for too little, you will have a continuing fund-raising problem. However, don't inflate your costs; you must put realistic figures into your budget.

Don't forget to look at all the possible sources of finance and then decide what proportion of a particular item or which items are appropriate for each particular trust. Different trusts can then be approached for different items.

Make sure that you ask each trust for an amount that is possible for them. A mistake that groups often make is to ask for a sum that is much too large for a particular trust, say ten thousand dollars, when a request for a smaller amount for some item in the budget, say costing two thousand dollars, might have been successful.

Trusts will want to know from whence you expect to receive or have already received funds. They will often be prepared to co-fund with other trusts, and it is important to recognise that many trusts share information about projects. It is essential, therefore, to state who has already agreed to support the project,

who else you are approaching and what other plans you have to achieve your fund-raising target. You can also get advice from any trust which is prepared to fund you about which other trusts might be interested or worth approaching.

Trusts will want to know that you have thought about your future. This is especially true for trusts interested in supporting new projects. So make it clear that you have thought ahead and that you have some ideas on where funds might come from once the trust funding comes to an end.

It often helps to be able to demonstrate an element of self-help in funding as trustees may feel this is evidence of the commitment of the people involved to making a project work. So support from your local community and through your own fund-raising efforts, and the amount of income you can generate as earned income (where this is possible) are both important points to highlight.

### **Presenting Your Application**

Presentation is very important. Raising money from trusts is a very competitive business. Trusts receive thousands of applications, and the situation is getting worse. The majority of applications they receive are turned down.

When writing your application, be concise. You must get your basic message over in as short a space as possible. Trustees will not have time to read detailed documents about every project. However, where the trust has a full-time secretary or director, he may be able to look at more detailed documentation. Thus a one or two page letter plus supporting documents is my favoured formula. In this you should convey clearly, without using jargon, exactly what you want to do and why. Don't forget to provide evidence of the need for your project.

In the case of the small group of trusts you have selected as likely to be most interested in your work, try to relate your application to the interests of each

*(Continued overleaf)*

trust you are approaching. Try and make them feel you share a common purpose with them, that you share their priorities, and that you wish to foster a partnership with them.

When you writing an application, convey your sense of enthusiasm and excitement. The more you can create a feeling of personal commitment to the project the better. Try to avoid being too remote, too dry and too impersonal.

Trustees will want to know that they'll get value for their money, so spell out who and how many people will be affected by your project. Your letter should state clearly how much you want and how urgently help is required.

Supply a budget and some evidence of your organisational credibility such as your annual report and accounts, press cuttings, and references or quotes which support your case.

### **Personal Contact and a Developing Relationship**

In all types of fund-raising a personal approach is normally the best, however this isn't always possible. For instance, some trusts won't meet applicants. The more you can make personal contact the better the chance of establishing a sense of partnership and common purpose.

There are different ways of developing contact. Only the larger trusts employ full-time (or part-time) staff to deal with applicants.

- For smaller trusts a personal contact with a trustee can be important.
- For the larger trusts, most do not like phone calls out of the blue from new applicants and they prefer to deal on the basis of a written application.

You can choose to send a full application, or just an outline of your project and what is involved.

In either case you can then suggest that they come and see your project or request a meeting with the trust when you can present your case.

If they think they might be interested, many will be happy to do this.

You can follow up your written communication with a phone call to enquire whether they have received and read your application and whether a meeting is possible (but do leave a reasonable period before doing this). It is very irritating talking about a project to people who then make a formal application for something that is outside the Trust's priorities.

**“... people who then  
make a formal application for  
something that is outside  
the trust's priorities.”**

If you have had previous contact with a trust, then it's much easier. You can even arrange a meeting to discuss an idea or ask for advice.

If you don't know the trust, you may be able to get a personal introduction from an intermediary who knows your work and is respected by the trust.

Wherever possible, it can pay dividends to involve a trust's secretary or director in discussions about a project before you make a formal application. This will help to cultivate a sense of partnership and may affect what that particular trust might be happy to support.

Be careful to listen to the advice they give. It is very irritating for a trust to spend time talking about a project to people who then make a formal application for something that they have been told is outside the trust's priorities.

The first trust I ever applied to for a grant taught me the lesson that trusts will often back people as much as ideas or organisations.

They had been going to turn down the application on the basis of the written material because it failed to convey a sense of personal commitment and belief in the project.

Happily, when I met them, my own enthusiasm for what I was doing persuaded them to think again.

Most people will need to go back to trusts on many further occasions, so develop your relationship with them over time.

Trusts are on the whole most likely to support people or organisations they know and trust, so send regular reports on your project including a statement of how the trust's money was spent.

Keep trusts aware of your work even when you're not asking them for money. This last point is extremely important.

It is important to keep very careful records of all your contact with trusts so that you can refer to previous contacts when you next apply to the trust. Failure to acknowledge previous contacts can be a cause of irritation.

At all times aim to reinforce the good feelings of those who have given you support.

Trustees like to feel enlightened, imaginative and reassured that their judgement was right in backing your project instead of other projects.

Acknowledge a trust's support at every opportunity.

### **Some Do's and Don'ts**

The following are a summary of some of the key points mentioned above.

#### **Do**

1. Plan a strategy
2. Plan ahead
3. Select a good project
4. Believe in what you are doing
5. Select a target
6. Write an application tailored to the needs of the trust you are approaching
7. Use personal contact
8. Prepare a realistic and accurate budget for the project
9. Be concise
10. Be specific
11. Establish your credibility
12. Keep records of everything you do
13. Send reports and keep trusts informed
14. Try to develop a partnership or long-term relationship
15. Say thank-you

#### **Don't**

1. Send a duplicated mail shot
2. Ask for unrealistic amounts
3. Assume trusts will immediately understand the need you are meeting
4. Make general appeals for running costs
5. Use jargon
6. Beg

**Hugh Frazer**  
**former Director**  
**Northern Ireland Voluntary Trust**

# American Philanthropy

## An Australian Perspective

The United States is unique in relation to the size and scope of its philanthropy. It is the only country in the world where giving and volunteering are a mainstream activity - in other countries it is most often those at the top of the pyramid that do the giving.

In the United States, the pyramid has a wide and deep base of millions of Americans annually giving part of their incomes, though often minimal.

This particularly American tradition can be seen in the figures prepared by the Independent Sector, which show that immigrants to the United States have a different giving profile to those born in the US.

While the average household income for contributing households is almost the same, 76% of respondents born in the United States reported household giving, while only 62% of households comprised of members born outside the US reported making donations. Australia, like the United States, is part of the New World, and shares many similarities.

**Australia, like the United States, is part of the New World, and shares many similarities.**

However, the importance of philanthropy as part of being a good citizen is not one of them. One is reminded of the relevance of the following quote about France when speaking of Australian society:

*"An octopus, and an inefficient one! That is what the State is becoming, despite the fact that there is a corps of efficient, at times outstanding, civil servants. An octopus I say, for by indefinitely extending its responsibilities it has gradually put our entire French society under its paternalism..."*



Clare Cannon - Study was undertaken for the New School for Social Research in New York

This octopus of government is in marked contrast to the way many American givers feel about their society. American philanthropists tend to believe that the private non-profit sector is essential to the American Way of Life.

They believe it compares favourably with the European welfare states - which they see as too "socialistic".

In a survey sponsored by the Council on Foundations and the Yale University Program on Non-Profit Organisations, the people interviewed considered that their funding decisions were better than those of the government.

On the other hand, particularly in the last ten years, Australia has been working towards a more corporatist approach to power in contrast to the pluralism of the United States.

This means that more than ever, the power of the individual through his/her philanthropy, and the non-profit organisations which are the means to the ends, is diminished. Thus Australians become more like servants to their government. Americans see their government as the servant of the people and not the master.

This big government, big union, big business approach in Australia means that the arms of the octopus of benevolent government spread much wider in Australia than they do in the United States.

In the latter case, philanthropy has stepped in to create part of the American middle way, which is between a type of capitalism characteristic of the Old World in which the owners surrender little of what they have unless they are forced to do so, and socialism.

Americans feel individual social responsibility for helping others. In a national survey undertaken by the Gallup Organisation for the Independent Sector, the largest proportion of respondents (53%) listed their motive for giving as being that they felt those who had more should help those with less. Over half the wealthiest people in the United States belong to families who have formed foundations.

**Over half the wealthiest people in the United States belong to families who have formed foundations.**

It is interesting to note that in Australia there seems to be a marked lack of such ideology, which is illustrated particularly clearly amongst many of the wealthy of the country.

The Business Review Weekly, one of Australia's leading business journals, first launched in 1983 a list titled 'The Rich 100'. It showed that Australia's wealth was no longer controlled by a rural elite whose roots to the Australian soil went back many generations.

Instead, it indicated that most of the wealth was:

- made, not inherited;
- that sources of wealth were widely distributed throughout the economy, and
- that many of the great fortunes had been built by post-war immigrants.

The focus of attention was on Europeans who brought their ambition and acumen to Australia in the first wave of post-war immigration - the New Boy Network, as it became known. It appears that the New Boy Network did not feel the social responsibility of their Old Boy compatriots.

Even the Old Boys did not have the personal visions of society which could be promoted through philanthropy like the Old Boys of American Society - people such as Andrew Carnegie, John D. Rockefeller and Margaret Olivia Sage.

Paul Trainor earned \$47 million from the sale of his Nucleus shares to Pacific Dunlop and then gave a large percentage of it away to family research institutes and foundations - the only such incident recorded in the Rich 200's eight years.

Unlike the United States, where giving large sums of money to charity or creating a foundation are seen as methods of increasing personal or family status, the Paul Trainors of Australia have received little or no recognition for their philanthropic efforts.

American society/capitalism is far more competitive than the Australian version of capitalism, which is much more laid back.

For a start, there is not the population with which the individual must compete.

*(Continued overleaf)*

Also, there is the other Australian ethos, second only to the paramount sentiment of mateship, of "she'll be right, mate."

**"she'll be right, mate."**

Perhaps the more unsettling reason for the less competitive nature of Australian capitalism is that Australians see themselves as having an egalitarian society - it is true that family background and accent do not play a large role in determining personal status within this society, but there is more to it than at first meets the eye.

Australians do not share with Americans that wonderful trait of wanting people to do well, and congratulating them when they do.

The above points lead to two results as far as philanthropy is concerned:

- Firstly, because Australians consider themselves as having a more benevolent capitalism, they feel they do not have to take the same degree of personal responsibility for the welfare of others who have not done so well. Big government will take care of them.
- Secondly, they do not like to be seen as too successful in case they become the object of scorn by knockers.

Thus, they do not tend to give much in case they are seen to give. When they do give, they tend to do so through the more anonymous channel of the company charity box.

It seems odd that a race of such individualists, a population which more often than not heartily disrespects its politicians, and a nation which was built on anti-heroes such as Ned Kelly, should have such faith in its governments.

Perhaps it relates to the fact that Australia, as a penal colony, had a bureaucracy before there was settlement.

In the United States, immigrants crossed the Atlantic in such large numbers and at such a steady pace, communities existed before there were the governments to rule them.

The populace managed their own communities until governments came along. When they did, they received a healthy disrespect.

It is interesting to note that Australian society was very much founded on horizontal relationships as well. Australians continue to pride themselves on the fact it is certainly possible to make good in this country, and to move to positions of power regardless of background or breeding.

Yet this is not achieved through the joining approach of Americans. A tidy example of this individualistic approach can be found in the workplace, and is provided by Ian Deveson, Chief Executive of Nissan Australia. He says, "Australian workers do not have a good history of co-operation."

**... Australian workers  
do not have a good history  
of co-operation.**

"Isometimes say that if you put two Japanese together, you get the output of three people; if you put two Australians together, you get a demarcation dispute!"

In the Council on Foundations/Yale study some intriguing trends were found in relation to women and philanthropy.

Amongst women interviewed whose families were involved in foundations, the husband was usually the entrepreneur, and the wife the philanthropist.

# Japanese Philanthropy

In the same study it was found that men who inherited wealth tended to invest their fortunes in business endeavours, whereas women in the same position tended to set up charitable funds and foundations, which they administered themselves.

The ideology of doing good tends to correspond with traditional expectations about women's aspirations and interests.

Indeed, philanthropic work is considered appropriate for rich women.

Particularly from the American perspective, Australia is seen as a sexist country - we just do not have the women in positions of influence in Australia that the United States does.

Women do run some of the large family foundations in Australia, but never in their own name, (for example they will be named the "Smith" Foundation, not the "Jane Smith" Foundation).

It is however much more socially acceptable (again so as not to be seen to be too successful), that wealthy women volunteer their time to charities even though they may also give to them privately or anonymously.

The "she'll be right, mate" attitude still lingers on in Australia. With the recession (arguably depression) the country faces at the moment, and with the extremely high levels of State and Federal Government debt, Australia can no longer afford to look to government to fulfil all the social, economic and environmental roles within society.

It needs to turn increasingly to the non-profit sector for these functions.

By doing so Australian society will benefit from the added advantage that only the non-profit sector can provide - programs to address society's needs will be more at the cutting edge.

*Taken from a comparative analysis of the ethos of Australian and American Giving by Clare Cannon.*

For Japanese, "a sense of marketing-first and company-first prevents them from being sensitive to the community's needs for philanthropic activities," said Kazuo Watanabe at meeting of Grantmakers and Development Officers in the US earlier this year.

Mr Watanabe of Mitsubishi Electric in Tokyo (formerly president of the 600 employee Mitsubishi Semiconductor Corporation Plant in Durham, North Carolina), shared his perceptions of American and Japanese philanthropy.

He noted how his experiences in the US have helped him to formulate his own ideas of the nature of philanthropy and corporate citizenship - ideas that are neither easy, nor natural to the modern Japanese business culture.

He identified obstacles to philanthropy in Japan:

- the sudden urbanisation of Japan after World War II, with the accompanying loss of the old local sense of community ties;
- The way in which the old obedience and loyalty to the Emperor transformed into devotion to companies and organisations;
- The much smaller tax incentive for charitable activity in Japanese religious beliefs - whether Buddhist or Shintoist - an emphasis he finds very strong and formative in the Christian background of Western philanthropy.

Another deterrent to Japanese Philanthropy is their very long and demanding work day. They are left with little time or inclination to take on extra responsibilities, but Mr Watanabe's experience in the US has taught him some important lessons about the business worth of philanthropy.

In part, he realised a corporation owes a community help with solving its problems out of a spirit of gratitude for its support, which is not always apparent and sometimes indefinable.

*(Continued overleaf)*



*Traditional Puppet Play performed by children is among activities supported by the Nippon Life Insurance Foundation*

In the long term perspective, he had come to see that philanthropic activities are important to enhance the corporate image.

Mr Watanabe has become active in carrying the message of philanthropy to Japan.

- He tells other Japanese how the world expects more of them as a wealthy nation, and therefore a donor nation.
- He tells them they have to study and understand the Judeo-Christian tradition of philanthropic activity.
- And he tells them they cannot in the long run succeed in the Western marketplace if they do not develop and voice an effective social policy.

He describes to his compatriots the American example he observed and tried himself:

- 1) Participate in what the community perceives as its needs.

- 2) Be sensitive to the needs of employees and their families.
- 3) Make donations, but also give of your own time to the community.
- 4) Share and demonstrate pride in the local community.
- 5) Be receptive to community ideas and needs, and respond to them.

It has not been easy for Mr Watanabe to bring these lessons home to Japan.

As he pointed out, there is much in Japanese business thinking that works against philanthropic attitudes. But he believes he is making progress.

**Reproduced with thanks to  
The Pacific Northwest Grantmakers' Forum  
Seattle, USA**

# The Living Past

**A**lthough the Australian Ballet Foundation is just under thirty years old, and viewed in those might not be considered to have much history, it is the inheritor of a long and distinguished tradition of dance in this country and overseas. The foundation itself is certainly aware of its own story and of the legacy it is built on, and for nearly twenty years has employed Edward Pask, ex-dancer, collector and passionate believer in the importance of the past, as archivist and unofficial historian.

Edward's domain is a smallish, well-arranged room in the foundation's magnificent South Melbourne building which was opened for the bicentenary in 1988. This national home does Australian ballet proud, and the effort devoted to acquiring, storing and displaying the archives also reflects the high professionalism and acclaim that are associated with the Australian Ballet Company.

A grant from the Sidney Myer Fund enabled the purchase by the archive of a most satisfactory French filing and storage system which operates on lateral hanging principles and color co-ordination. Within it is stored a vast collection of material including programs, brochures, cast sheets, photographs, memorabilia, posters, paintings, engravings, biographies of dancers and scenarios of ballets (prepared by Pask), reference and historic books, costumes and scenic designs and many other items and artifacts. Some props and costumes are also to be found in the room although the majority are stored elsewhere for space reasons.

"I wanted an area for the archives - which previously had been scattered at various locations - where people could use and view what we have, and work at a desk if they needed to. Archives are to be shared; we didn't want a mausoleum," says Edward. 'Enquiries and visitors arrive from all over Australia and overseas - students, researchers, people from the media, writers, ballet lovers, and others. We find that visiting companies are very interested in our collection and I particularly recall the fascination of members of the Kirov, among whom even the *corps de ballet* are steeped in the past.'

'Where appropriate the material is wrapped in acid-free paper and boxes and other correct handling and

storage techniques applied,' says the archivist, whose skills are self-taught. 'I am very happy with the system and the way it can be accessed. Details of our valuables are also recorded on computer. Ideally I'd like a bigger space and to be able to include our press cuttings books and to mount permanent exhibitions here.' Temporary exhibitions held are in the foundation's studios, while other exhibitions have taken place in David Jones' store and the arts centre in Melbourne, and in Sydney. A selection went on display in London in 1988 where, along with the company, it was most successfully received.

The range of the collection is eclectic and all inclusive, based on ballet and dance worldwide, in Australia or Australian, at a professional level. 'I interpret dance in a very broad way and collect things not only to do with ballet but contemporary and folkloric groups and other classifications too. I'm also interested in the work of individuals like Lola Montes, Isadora Duncan and Josephine Baker - in fact an engraving of Montes was our first acquisition when we started back in 1972,' says Edward.

He personally sought out many of the items in the collection. 'I followed arts sales, scoured markets and antique shops, ordered from overseas. We have had many generous donations and are always interested in receiving more from the public.' He does not have a budget for buying individual items but approaches possible patrons or corporations for funds or raises them through his own efforts. One of the latter is the sale of attractive cards featuring a scene from *Giselle*; these are currently available.

Edward Pask was classically trained as a dancer himself and has worked extensively in paid and unpaid capacities in various spheres of dance and the theatre as well as outside the area for many years.

**For further information:** Edward Pask, Archivist, The Australian Ballet Foundation, 2 Kavanagh Street, South Melbourne 3205, phone (03) 649 8600.

This article is one of a series produced and paid for by the Myer Foundation and Sidney Myer Fund. It serves a dual purpose of supporting quality magazines like Australian Society as paid advertisements and promoting the interests of philanthropy. Thanks to Australian Society and the Australian Ballet Foundation for their permission to reproduce this article.

## Review of AAP Membership

The Council has proposed a number of amendments to the Constitution to allow for the inclusion of Associate members from individuals and organisations which are not eligible for full membership.

In the case of philanthropic organisations which are interstate, a choice will be provided to become either full members or to become Associates. The purpose of these changes is not to depart from the policy of

including only grant-makers in the membership of the Association, but to allow the Council to set the schedule of fees in a way which will reflect various levels of Associate membership.

It is not proposed in the recommendations, which were accepted unanimously at a general meeting on 14th November 1991, that these categories of Associate membership will have the right to vote or to hold office.

## International Study Tour

As part of his trip to the World Congress on Philanthropy in Miami during December, Max Dumais will continue the second stage of the Association's study into Patterns and Trends in Giving by visiting a number of agencies which have developed programs to promote corporate giving.

In Washington, he will visit the Independent Sector which was responsible for the development of the 5% program in the United States.

He'll also visit the Centre for Philanthropy in Canada which developed the *Imagine* program, which has the national objective of companies providing 1% of operating profit, before tax being to the community.

Returning via the United Kingdom, he will visit Business in Community, which has developed a similar program around the notion of the Per Cent Club.

In the United Kingdom, with the kind assistance of Des Palmer from Allied Dunbar, as in the United States with the assistance of Jacque Reis from the Minneapolis Association of Foundations, he has an itinerary to visit a number of corporate headquarters.

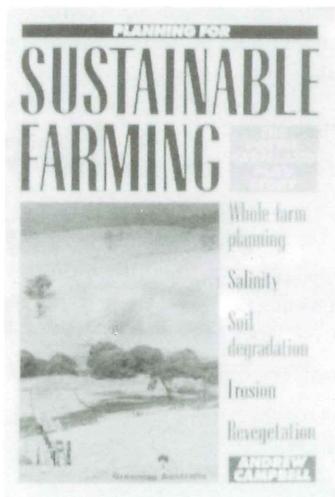
In the coming year the Association is planning a series of Conferences around the theme of Corporate Giving in the Community. The material from this trip will form a strong basis for their planning.



Dialogue With Donors - Carol Simonetti speaks to a standing-room only crowd in Lorain County, U.S. The AAP is not the only Association to draw crowds to its workshops on "How to approach Trusts and Foundations"

## Planning for Sustainable Farming

by Andrew Campbell, published by Lothian Books



This book is another outcome of the inspired Potter Farmland Project in Victoria's Western District. Andrew Campbell was its Project Manager and his book is an account of its first three years.

*Planning for Sustainable Farming* is interesting not only from the point of view of farmers looking to sustainable agriculture and working to protect the environment and the productivity of the farm at the same time, but also as a fascinating social experiment which worked.

The Project drew together many apparently disparate groups in the community - farmers, environmentalists, accountants, bank managers, voluntary groups and government departments.

Campbell's book does not attempt to gloss over differences in approach and execution. One of the book's great strengths is that the success of the project can be seen in the Potter Farms themselves.

PRICE: \$19.95 Available from bookstores and selected newsagencies.

## Effective Trusteeship: Issues for Creative Philanthropists

Written by Dawn Wong of the Law Foundation of New South Wales.

This publication is an extensive report of Ms Wong's study tour to North America, England and Italy. It covers areas such as Assessing the Impact of Grantmaking, Maximising the Rewards of Foundation Trusteeship and Foundation Staff: The Professional Approach.

PRICE: \$25.00 (plus \$3 postage and handling)

## Successful Submission Writing for Business and Non-Profit Organisations

By Jean Roberts

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# Philanthropy

Philanthropy is the official journal of the *Australian Association of Philanthropy*. It is published quarterly and mailed to members of the Association.

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

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## Christmas Reminder

The *Victorian Council of Social Services Combined Charities Christmas Shop* will be open at 203 Flinders Lane, Melbourne (behind St. Paul's Cathedral) from 16 September to 18 December.

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# 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 reflect 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 scrutinize any proposed Federal or State legislation likely to affect private or corporate philanthropy and to take such action as the Associate 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.

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