

# philanthropy 17

The Journal of the Australian Association of Philanthropy

WINTER 1993

Issued by Australia Post — Publication No. VBH 9216



Special Feature:  
Ethnic Aged Care

# Contents

# Cover Note

<b>EDITORIAL</b>	1
<b>REPORTS</b>	
Counselling in the Computer Age	2
Philanthropy Directions for the 90's	8
Private and Corporate Giving	10
Way Out West	13
<b>SPECIAL FEATURE – Ethnic Aged Care</b>	
Casa Elda Vaccari	15
Montefiore Foundation	18
<b>PHILANTHROPY NEWS</b>	
<b>Launch of Directory</b>	20
<b>Luncheon Program</b>	21
April – Casa Elda Vaccari	21
May – Graeme Wise on the Body Shop	21
June – Private Philanthropy mechanisms	21
<b>Industries Commission on Charities</b>	20
<b>Coming events</b>	
July Luncheon – Naomi Feils and Validation Theory	21
August Luncheon – The Informal Economy	
October – Annual Conference: <i>The role of private and corporate giving in the Public Good</i>	
Council Members	21
Welcome to New Members	21
<b>BOOKS AND PUBLICATIONS</b>	
The Australian Directory of Philanthropy – <i>Latest 7th Edition</i>	22
Successful Submission Writing	22
Philanthropy Journal	22
Charities and Philanthropic Organisations	23
A Grantseeker's Workshop	23
Good Grant Making – <i>A Practical Guide to Informed Giving</i>	24



Kerri one of the artists from the Mulleraterong Centre in Hamilton who worked through the winter of 1991 with artist Sally Marsden and support from the Sidney Myer Fund, with her painting, "Rainbows".

This edition of **Philanthropy** was provided through the assistance of The Gandel Charitable Trust which supports the Association of Philanthropy's objective to promote both strategic and effective private and corporate giving.

## Disclaimer

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

# EDITORIAL

In the last edition, reference was made to a renewed emphasis on questions of the "public good". In recent months, it is interesting to note the number of conferences and the range of organisations and interest groups which are beginning to address this issue.

A common feature so far has been the contribution by Professor Julian Disney and/or Bishop Peter Hollingworth in these discussions. A precis of the Julian Disney comments at our Annual General Meeting appear in this issue and set some of the agenda for the discussion which is beginning to take place.

The Institution of Engineers held a recent round table discussion on the creation of wealth and social justice in conjunction with the Australian Enterprise Network, which is supported by Bishop Hollingworth. The discussion revolved around the changes required within Australian society – its education and its attitudes to the creation of wealth and the need to address the fair distribution of that wealth. In quick succession there have been forums proposed by the Economic Society, CEDA, a forum arising from that report to the Bishops Commission on Poverty and our own deliberations which are currently taking shape about the need to consider the role of private and corporate giving in the context of the public good.

In each of these discussions it is refreshing to note that wealth creation is being considered in a much broader context. In contrast to the restricted notion of "wealth-creation" which is too readily seen as the activity of a small and privileged group benefiting themselves at the expense of the nation, the current discussions reflect more upon the common "Wealth".

In this context there is recognition of the social policies which relate and inter-relate with economic issues. Issues such as education, political stability, social cohesion, quality of living and environmental enhancement, not to mention the development of society based on a just distribution of the nation's



wealth, are beginning to be discussed in ways which are not mutually exclusive with the creation of that wealth. At the Business Council of Australia's recent 4th National Business Summit, John Prescott, the Managing Director of BHP, called in to

question the simplistic assumption that it was the responsibility of governments to watch out for the public good and that the business of business was simply to create wealth.

In these days of government cut back on programs that support the social infrastructure, it is important to recognise that the creation of 'wealth' for its own sake need not necessarily do anything for the development of a common 'wealth'.

In fact, during recent years and at the height of the economic rationalist debate, one might have been forgiven for considering that some proponents do determine that society exists for the good of the economy and not vice versa.

Of particular relevance to the Australian Association of Philanthropy is the development of strategic giving of a private and corporate nature. It is a tragedy that the currency of 'philanthropy' has come to be so devalued. Michael Douglas in the recent movie 'Falling Down' depicts explicitly the level of social alienation and the gross imbalance of opportunity which comes from being determined by society as 'economically unviable'. It is therefore important to spend the necessary effort to articulate the ways in which leadership and private wealth can be brought into play to bolster and support the public good.

**Max Dumais**

# Counselling in the Computer Age

## Streamlining Counselling Services using modern technology.

The human and social services sector has been one of the last to embrace modern technology to achieve higher degrees of efficiency, adjust the right mix of services, of gathering and storing data about needs and issues and retrieving that data in such a way that it assists the whole process of service development.

Kids Help Line National telephone counselling service has been able to preserve the best of the human interpersonal touch and yet combine it with the best of computer and telecommunications technology, which produces a service attracting and monitoring hundreds of thousands of client requests each year.

### How it all began

In 1990, Brother Paul Smith of the Queensland based Boystown Organisation travelled to the United Kingdom, where he studied the child abuse prevention program called Childline. He immediately recognised that this was a service which had implications for Queensland and possibly Australia.

It was obvious to Brother Paul that modern technology would play a significant part in the establishment and development of such a service. Fortunately, Boystown had established over the years a very sophisticated telecommunications system to process telephone orders from all over Australia to purchase Boystown Art Union tickets. The Boystown Art Union has been a long standing fund raising initiative of the De la Salle Brothers. In addition, a large capacity IBM AS400 mainframe computer had been installed to maintain a data base of all past, present and future customers of the Boystown Art Union.

Within a very short period of time, systems for the recruitment, selection, training, supervision and development of counselling staff were in place. Some unique data base programs were developed, which not only provide the counsellors with a quick and ready reference to a wide range of child, youth and family services throughout Australia for referral purposes, but enabled the counsellors to key in and

record non-identifying data about each call they receive for future retrieval.

Telecom Australia were challenged with the task of setting up a solution which could deal with hundreds of incoming calls on a toll free telephone line, re-route them direct to counselling stations and also provide the capacity for a supervisor to monitor calls and assist counsellors when required.

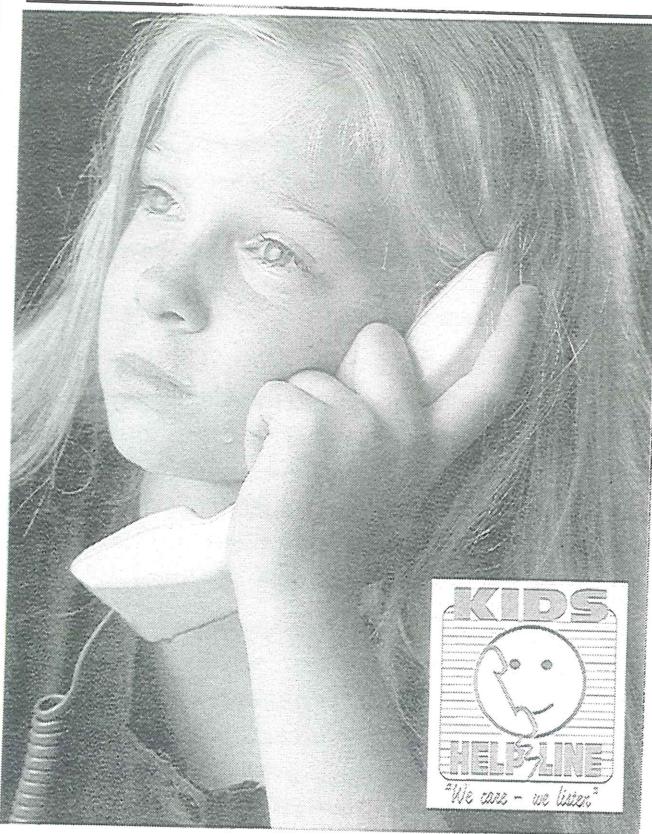
Central to this whole exercise was the desire and the determination of the service planners and developers to optimise the "human-ness" of the service. For this reason, a great deal of energy was expended in selecting counsellors, providing them with the highest possible quality training, supervision and professional development and overcome the dangers of putting barriers between the callers and the service.

At present the service is directly accessible by the caller without the intervention of a receptionist. However, during peak calling times a recorded message advises callers to call again later or wait for a counsellor to become available. The service is accessible 24 hours a day and 7 days a week. It is a free service, callers are able to stay anonymous for as long as they wish and information disclosed by callers is treated confidentially. Many children and observers commented on how empowering the service was to the callers. They choose when to seek counselling, what they wish to say and when to terminate the call. They may also choose the counsellor to whom they wish to talk.

### What has been the outcome.

The response from the children of Queensland was overwhelming. After 6 months the counsellors had answered 67,500 calls although it was obvious that many others had called but had been unable to get through at first.

Thousands of children in the 5 to 18 years age group bombarded the service with telephone calls. This was partly due to a very successful television advertising campaign, the distribution of publicity material through all Queensland schools and the applicatio



of small stickers to the telephone boxes by the Scout Association, but more importantly, the children responded enthusiastically to the concept of telephone counselling "for any problem".

The combination of the medium, the technology, the trained personnel, the anonymity, the accessibility, the counselling method and its warm personal approach encouraged Kids Help Line to explore the potential of expanding the service to other Australian States.

#### **Taking it a step further**

Launched in Queensland in March 1991, by September Kids Help Line had expanded into the Northern Territory, and by November 1991 the children of Victoria were calling the service – managing to double the number of calls received.

There was a short respite from further expansion until the service was offered to Tasmanians and South Australians in August 1992. By March 1993 Western Australians were linked into the service, while the Australian Capital Territory came on line in April 1993 and New South Wales completed the national picture in May 1993. The Kids Help Line counselling service is now potentially accessible to 3.14 million 5 to 18 year old Australian children and young people.

By March 1993 Kids Help Line had received more than 750,000 calls from Australian young people, one third of which were problem calls. The other calls were what are termed "soft" calls – those that do not identify a specific problem. Some of these calls are frivolous, others are test calls and a few are nuisance calls. They represent a significant proportion of all calls in number but only a small percentage of our client counselling time.

The quality of the service being provided to the callers is reflected in some of the statements made by users of the service, quoted below: (Real names are not used but the situations are factual.)

#### **JODY (13 YEARS)**

*I've told Mum. Oh God, I can't believe I finally told someone! She says she'll help and has already kicked him out of the house. We're going to try and get through it together till the baby's due.*

#### **BRETT (AGE UNKNOWN)**

*Thank you Kids Help Line – I'm now living at the centre you referred me to and they are helping me give up drugs. Off the street and maybe off the drugs with one phone call – wow!*

#### **STEPHEN (16 YEARS)**

*I'm back with my parents and everyone's a lot happier since we talked things through. Hey, guess what? I got a promotion. I'm now second in charge at the garage.*

#### **MELISSA (9 YEARS)**

*Dad's not so angry anymore and doesn't pick on me all the time and Mum's come back home. (Mum took a break for a while to work her life out).*

#### **Some Technological Hitches along the way.**

As the telephone counselling service expanded and the pressure on the lines became greater, the system became clogged up with calls which could not be answered immediately. Telecom became involved in a detailed business review and the analysis of the technological problems being encountered. In March 1992 they came up with a solution in the form of a voice message card and their telecommunications system called I.S.D.N., Integrated Systems Digital Network. The result was increased performance, speed, clarity, integrity and reliability. The voice message card gave callers a clearer message about the accessibility and potential waiting times.

An additional benefit arising from the review of the system was the introduction of a facility called 'network division'. This enabled the Kids Help Line counsellors to discuss a situation with a caller – then agree with the caller that a third party could appropriately be involved in the discussion. For example, a caller who has just been raped and sought immediate counselling from Kids Help Line could, at an appropriate time, be referred to a rape crisis service near them by way of a three-way telephone referral.

The Counsellor could introduce the caller to the duty worker at the rape crisis service and remain on the line to provide moral support until the caller is reassured that face to face help is at hand. This service can link any caller with any other service anywhere in Australia at no cost to the caller and perhaps, more importantly, without the need for a re-referral with its attendant dangers of time delays and reduction of the caller's confidence.

Complaints that many calls were not getting through during the peak hours of 3 pm to 10 pm provided an additional problem, especially as the service expanded State by State through different time zones. Telecom was able to offer additional facilities which evaluated and determined the effectiveness and efficiencies of both the communications systems and the call handling. Now regular reports are automatically generated about performance of the system, this management information being invaluable in decision making about how many of the 35 counselling stations should be staffed and

what the daily and weekly rosters should look like to ensure the pick up rate of calls is maintained at the highest possible levels.

At present the call pick up rate is a maximum of about 15,000 each week, which is about 20% of the total calls attempted. This compares most favourably with other telephone counselling services overseas.

#### **The Computerised Service Provider Data Base**

In about 12% of the calls received, the callers are interested and responsive to the idea of a referral to an appropriate local service that can offer them face to face support. It may take a number of telephone counselling sessions before a referral is possible, but when the caller is ready, the counsellors can consult a caller data base for each State of Australia.

This data base contains comprehensive information about the services that are appropriate for 5 to 18 year old people. The information stored includes name, address, telephone and facsimile numbers, contact person, services provided, referral criteria, if any, and detailed instructions about how to get to the service with any helpful landmarks. It was important to realise that not all children and young people have access to or know how to use a street directory, (so the information also includes such directions as "catch a bus from the city to stop 22, walk 100 metres down White Street until you come to a brown two storey building with a green wooden fence"). This data base can be sorted at will by the counsellors according to postcode, town or suburb, identification code, telephone area code or organisation name.

The information is linked to keywords tied to problem categories; the services can then be sorted in alphabetical order of town or suburb or of organisation name. This gives the counsellors quick and ready access to information about local services.

A helpful facility is the ability to generate reports from this service provider's data base. When it is time to audit or review or update any section of the data base, the program can produce a print out of all services in a particular postcode range or all services bearing a particular date when the



information was last up-dated. This facility is connected to a mail merge option so that a covering letter and addressed envelope can be printed together with a copy of the data for each of the services as it appears on the counsellors' computer screen.

Although some States of Australia have excellent service provider data bases, such as the Community Information Support Service of South Australia's Directory, a unique feature of Kids Help Line's data base capacity is that it has now established a service provider data base for 5 to 18 year olds which covers the whole of the nation, a feat never before performed, although often dreamed about.

#### **A Description of a Typical Kids Help Line Call Employing the Technology**

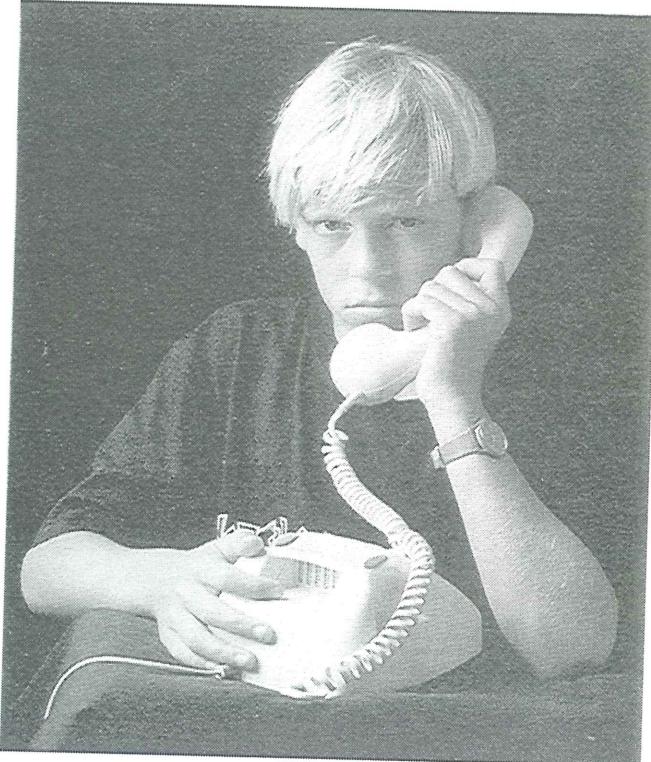
The time is 10.30 pm on a Friday night. A fourteen year old female has called Kids Help Line in a very distressed state. This is the third time her step father has come into her room and demanded sex while her mother is at work in the nearby hospital.

Tonight he was particularly insistent, demanding and threatening. As the child is telling her story, the counsellor is listening and responding but also learns that the call is coming from Victoria. She therefore calls up her Victorian service provider data base according to the keyword "Sex abuse". This gives her a list of all child protection services in Victoria including the After Hours Service and all regional services listed in alphabetical order of town/suburb.

All she needs is for the caller to respond positively to a referral and identify the town or suburb from which she is calling and the Counsellor can scroll to the town required and pass on the information required.

The counselling session has gone on for about 72 minutes and the caller is much calmer now. She decides that she wants the sexual abuse to stop and she has explored with the counsellor the range of options open to her for this to happen, including confiding in her mother, asking her grandma to become her advocate, reporting her abuse directly, etc..

The caller has still not given her full name or even the town from which she is calling, but the counsellor is recording as much information as the caller has been willing to divulge on a "Record a Call" data sheet, including estimates of the caller's age, gender and nature and severity of the problem.



The caller decides to confide in her grandma as the best strategy for her and was supported in this decision. However, should this not have the desired outcome, the caller was invited to call back again for further counselling if necessary, including the possibility of talking anonymously by three-way telephone with her local child protection intake worker.

At the conclusion of the call, the counsellor keyed all of the information she had recorded on the "Record a Call" sheet and saved it to the AS400 mainframe computer. The computer assigned a call number, recorded the time and duration of the call and any identification such as first name, so that the information could be recalled if the caller telephoned again about the same problem. She called back the following day to advise that grandma was willing to help her talk to her mother and they now needed details of the child protection service.

As she was calling from Mildura in Victoria, the counsellor was able to give her the name, address and telephone number of this service, offering again the three way telephone discussion if it was required.

This fairly brief but typical case study does not reveal what was going on behind the scenes. The call was also being monitored by the supervisor on duty, who was sending helpful suggestions and ideas about counselling from her station in the centre of the

counselling room to the counsellor by way of her computer monitor.

#### **Making use of the Kid's Help Line Data**

One of the most exciting uses of the combination of technology and good counselling practice, is the ability to utilise data collected to impact upon the lives of callers.

**First**, the Service Provider's Data Base can easily be compressed and saved to a floppy diskette, thus making it not just an in-house facility, but able to be installed on any IBM compatible computer for use by a wide range of other agencies, which require access to information about the services for 5 to 18 year olds in their State, or for the whole of Australia, if required.

Because the data base used has the facilities to edit, add and delete, any agency can adapt the data base to their own particular needs. Similarly they can use the reporting and mail merge component to update their own records.

**Second**, the Kids Help Line caller data base is readily accessible for a wide range of research applications. At present the data base is being used by Government and non-Government organisations to identify by postcode from whence the calls are coming with parameters such as age, gender, problem categories and sub-categories and severity codes of the problems presented.

This data can be prepared in a tabulated form, or using a spreadsheet software package with the capacity to prepare graphs and charts, enables the reader to compare graphically the proportions of problem calls from a particular region with another region and with the whole of the State if required. This statistical information has a number of constraints, which need to be understood, but it can be a useful indicator of issues in the context of other data that may be available from local surveys. (For an example note figure 1.)

Some organisations are using the data to confirm hunches. Others are using it to direct their attention to specific areas and target groups for needs analysis. Others are using the data to identify gaps in the range of services with a view to supporting submissions for additional resources. Others still are using the data to check out whether present policies and programs are responsive to the age groups concerned.

**Third**, the caller data base is being used as part of a quality control process within Kids Help Line itself. Every time a counsellor logs a call on the computer, the computer records also the counsellor's identification code. At regular intervals the computer can be asked to produce a report on any counsellor. This report shows how many calls each had, when they had the calls, what was the duration of each call, what was the nature of the problems being dealt with and how effectively the counsellor was able to make a referral to a local service if appropriate.

It is very rare for any profession to have a complete and detailed record of their work, workload and work practices produced by computer on request. These reports are used in the counsellor appraisal and in-service training program.

For example, a counsellor may spend proportionately more or less time than her/his peers on calls from a particular problem category – say child abuse. This may indicate that the counsellor is having difficulty dealing with this type of call, but is much more comfortable with the calls about less dramatic issues.

Discussion with a supervisor about termination of distress calls may lead to a program of personal development and training for a particular counsellor, which will equip them to address the issues of efficiency and effectiveness. There has been little turnover of Kids Help Line staff in the 26 months of operation and many believe that this is in part due to the excellent supervision, support, training, appraisal and development made available to staff.

**Fourth**, Kids Help Line is now well on the way to compiling a national profile of its callers. As soon as the latest States to come on line have been generating calls for a calendar year, it will be possible to compile this caller profile, but we will also be able to compare any State's data with any other State. Already we can compare Queensland data with Northern Territory data and with Victorian data. By May 1993 nationwide agencies, including the Commonwealth Government and its Departments will have access to national data the applications for which are legion.

**Finally**, the caller data base can be used to track the effectiveness of the process of referral to local agencies. Information about every call, where the caller was referred to a local agency in any of the States can be generated in a report. This report will advise the time, date, postcode of origin, nature of

problem, first name, age and gender of caller (if given) and the code number of the agency to which the referral was made as per the service provider's data base.

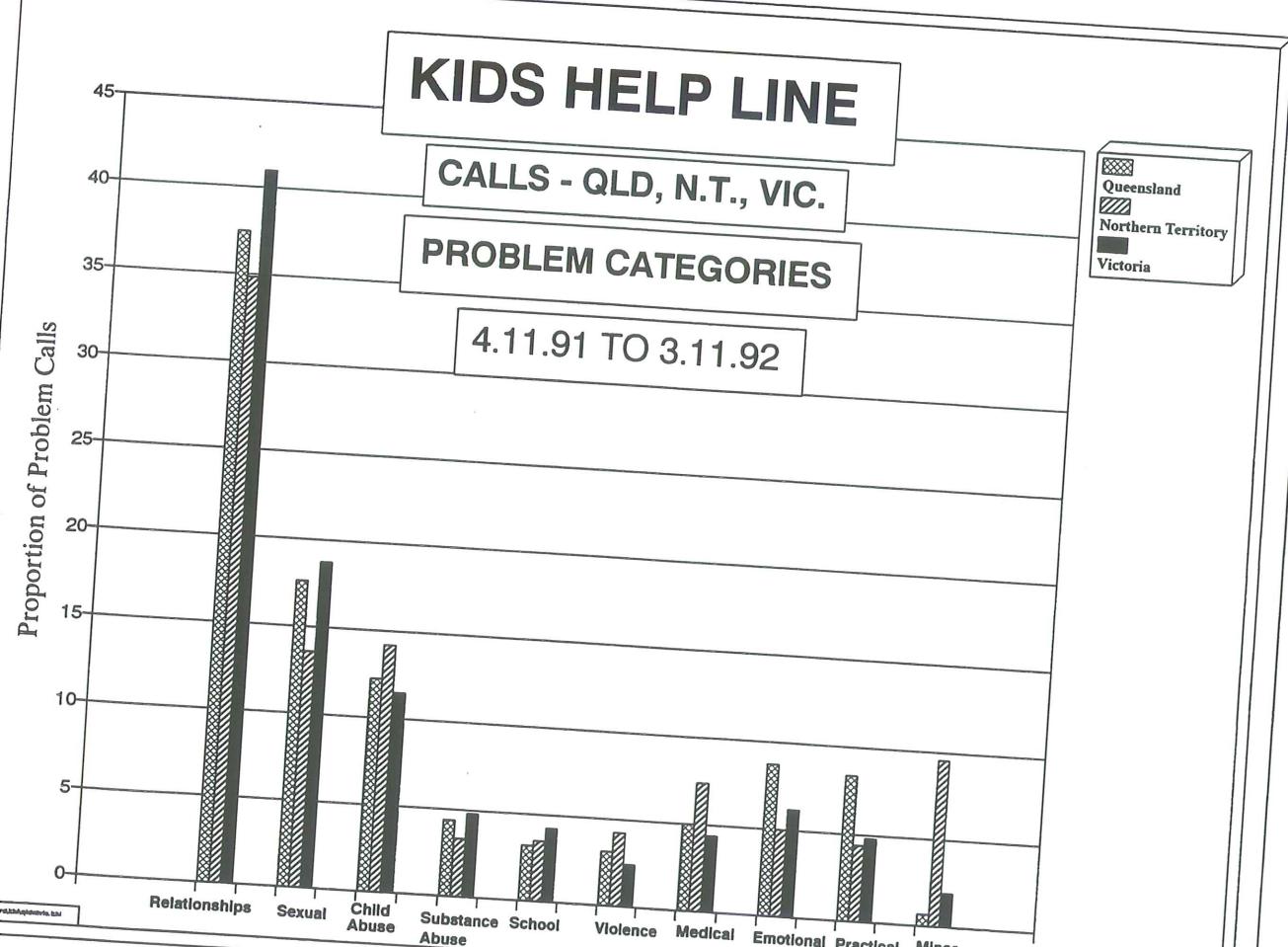
With care not to breach confidentiality, the agencies to which the referrals were made according to the report, can be approached to ascertain whether that person did make contact with the referral agency and whether they were able to offer the young person the service that they needed. This can only result in more effective referrals as both Kids Help Line and the agencies concerned become more aware of the high drop-out rate and review their referral procedures or reassess the quality of their intake and assessment services.

### In Conclusion

There is no doubt that Kids Help Line, one of the most recent national human services agencies to be established, has wholeheartedly embraced the most modern and up to date technology in service to its users. One should not overlook that the "human" component has not been sacrificed on the alter of modern technology.

In fact, technology has been successfully applied to benefit clients as well as service providers. Callers appreciate the efficiency as well as the professional approach of the counsellors. The counsellors appreciate the way that they can access information quickly for their clients and for their own development. Management appreciates that technology is making possible a service which would never otherwise be affordable. The community has yet to reap all the benefits that Kids Help Line can bestow, both in the excellent service it provides to the children of Australia and also in the responsible way it can utilise the information the callers provide in order to develop, improve and establish services that will respond to the needs of children into the 21st Century.

**This article was prepared by Mr. Max Kau, who is State Liaison Co-ordinator with Kids Help Line in Victoria.**



# Philanthropy Directions for the 90's

*An address by Professor Julian Disney to the Annual General Meeting on 23rd March 1993*

In addressing the Australian Association of Philanthropy's Annual General Meeting, Professor Julian Disney of the Centre for International and Public Law at the Australian National University, provided an opportunity to stand back and assess some of the strengths and weaknesses of this country and the respective roles they might play over the coming decade in its development.

Amongst the strengths he cited the relatively strong social infrastructure which included housing, education and child care as prime examples. The high level of political stability in Australia is a major plus as is the fact of our proximity to the fastest growing region of the world.

In terms of weaknesses, he identified the small size of our population, our geographic remoteness from culturally familiar countries, our dependence on overseas capital, and an unbalanced reliance on commodity trading.

From a social viewpoint, he singled out a large middle class which had become accustomed to a level of comfort which was more than the country could afford.

On both a positive and a negative side, Professor Disney pointed to the multicultural nature of Australian society and suggested that there were lessons for the rest of the world in the way in which the Australian society had both absorbed and been absorbed by the cultures of other lands.

He pointed out that Australia was a very lowly taxed country (the second lowest within the OECD countries) with low government spending. He alluded to a relatively unsophisticated business management sector, faced with the challenge of adapting to the realities of a country which has been deregulated and opened up to world economies. On the other side, he pinpointed the reality of a strong



*Prof. Julian Disney at the Annual General Meeting.*

union sector, which has often become more attuned to the realities and the disciplines required by these changes.

In recent times, Australia has increased its export orientation and, at the same time, experienced a massive blow out in overseas debt. The economy has been

subject to speculative and high risk activities which have left both private and government sectors highly vulnerable.

Accompanying this financial picture is an appalling unemployment rate with no realistic prospect of significant reduction for at least the next 4-5 years and the likelihood of a pool of long term unemployed at close to half a million.

The levers and mechanisms of the economy have been adjusted to an extent where the gap between the haves and the have-nots has increased – the poorer have become more numerous and the rich have become richer. Two factors that highlight this disparity more than anything are the issues of employment and home ownership.

Against this backdrop Professor Disney turned his attention to a number of priority issues.

He maintained that the dichotomy between economic and social issues is false and that the two objectives of efficiency and equity need not be odds. For example, the investment by a country like Australia in training its workforce leads to productivity which, in turn, reduces dependency both the individual and the country level. To further make the point, he noted that in attracting overseas investment, the features which are most salient are more likely to be the result of social policy rather

In a book prepared by Jerold Panas, a major fund-raising consultant called "Megagifts" the author sets out to interview a number of private individuals who have personally written a cheque for a million dollars – and in this case American dollars.

Stripped of the rhetoric and, in some instances, some massive understatement, the decision boiled down to three major factors: firstly, they obviously had the money to give; secondly, they identified – not so much with the problem or need (which is easy enough to do) but with the solution with which they were being presented and, thirdly; they had been convinced that the person and their organisation who were asking for their contribution could actually deliver what they promised.

Put another way, these individuals were prepared to write a cheque for one million dollars because they were convinced in their own mind that their contribution could make a difference – both immediately and more importantly, strategically downstream.

In the case of corporate giving, both here and overseas, there is a continuing retreat from the 'bucket of cash' and even the 'Chairman's cheque-book' approach to corporate involvement with the community.

The 'switched on' Corporations now talk more in terms of 'partnerships' with the community. Such activities are now being seen as mainstream, rather than peripheral and, in the more progressive companies, they are rigorously planned and evaluated against the company's overall commercial objectives.

It makes sense for Telecom to support Lifeline Australia. It is a partnership which not only aligns with both the product of the company, on the one hand, but also the service of the agency, on the other. The relationship provides an opportunity to contact the same consumer. In the case of Lifeline this necessarily means a person in stress and in the case of Telecom, that same person may be a person from a large group of those in default of their payments.

In the case of both private and corporate giving, there is a growing awareness of the need to focus that giving in ways which are strategic in their impact.

Those non-government agencies which have a clear mission and cause which can be communicated effectively are more likely to attract private support from individuals or corporate assistance in the form

of technical exchange of know-how or equipment, staff involvement in time or underwriting in cash.

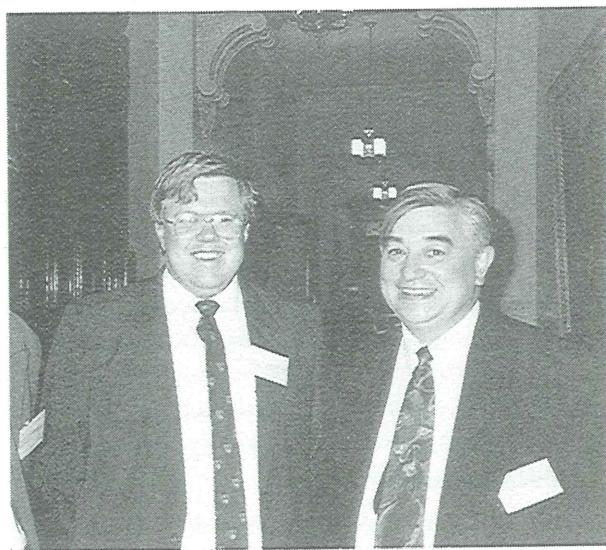
It may be clearer to determine how private individuals might respond to the irresistible force of a good idea whose time has arrived, but it is more complex to determine why companies should be prepared to become involved.

Corporate giving has two major elements which need to be understood by those agencies which are prepared to position themselves for corporate assistance: they are interested in accessing business networks and they are interested in strategic market positioning.

Strategic market positioning refers not only to market share for their products, although cause-related marketing provides 'value'-added marketing in its truest sense, it also relates to identifying with the issues of concern to its various stakeholders, including both investors and the talented and committed workforce they might aspire to attract and keep.

One thing is clear. It is not the wide range of tax incentives that Australia's tax regime hold out to companies interested in supporting community activity.

There is some company support which is directly related to supporting public benevolent institutions as defined under section 78(1)(a) of the Tax Act. A greater part flows in the form of marketing dollars, which are deducted above the line.



Myles McGregor-Lowndes and Max Dumais attended the CACOM Conference in Sydney, April 1993.

In many cases, the causes with which companies may choose to associate are not easily related back to this provision of the Tax Act. They are often presented by agencies or groups promoting issues which are not seen to be related directly to the relief of the poor.

Furthermore, while tax deductibility for the environment and the arts has been significantly rationalised in recent times, the whole issue of community services remains languishing under the constraints of Common Law interpretations.

At very least, if companies are to be expected to support community activities it may be reasonably argued that incentives should exist, not the disincentives encumbered with archaic provisions which do not accurately reflect modern conditions and requirements.

It is not yet clear what the Opposition parties consider as 'Charitable and Religious Institutions' for the purposes of exemption under the proposed GST. We can only hope that they intend to include those 'charities' determined under section 23(e) and not merely restrict this provision to Section 78(1)(a) group referred to above.

If such 'charitable' agencies are excused from paying income tax, due to both their charitable and non-profit nature it is past time that they be considered for full tax deductibility status and should certainly be exempt from any proposed GST provision.

It is precisely this type of dilemma that argues the case for the proposed Australian Third Sector Research initiative which is being argued at this conference.

It is time that we took a step back and assessed the importance of the role of the non-government agencies and determined the range of incentives and mechanisms which should be set in train to promote, nurture and consolidate their role within the community.

In the USA and in Japan, companies are allowed to direct a percentage of their gross operating budget, before tax, to community support. Both diminishing government support and the efficiencies that might be argued for the non-government sector in responding to community need should be marshalled to argue the case for a similar provision in the Australian context.

Most of the members of the Australian Association of Philanthropy are Trust companies which administer discretionary charitable trusts and individual family trusts. There are a few corporate members, but the

notion of 'philanthropy' often proves an impediment to membership. As outlined above, a good deal of corporate giving is transactional, it is offered in the context of a deal – hopefully it is a 'win-win' equation for either side. In these circumstances, companies may not wish to give the false impression that their involvement is purely altruistic or to be confused with "Philanthropy".

"Philanthropy" has also developed the unfortunate connotations of "Charity" as inherited from the British tradition of the Poor Laws, the work-houses, the work-test (what a familiar ring) and the deserving and undeserving poor!

If it is possible to say some uncharitable things about 'philanthropy', I would prefer to align our understanding of it with the much broader and more all embracing notions of 'philanthropy' with which the Americans imbue the notion.

In the United States, 'philanthropy' embraces a whole sector, not only the donors, but the grant-seekers, the volunteers, the non-government agencies and the whole 'third sector' which covers all aspects of community life.

The ethos of 'philanthropy' in the US is more closely akin to the idea of giving something back to the community than to that of stooping to assist the down and out.

This is partly due to less reliance on government in order to meet social need, partly to a basic distrust of government to deal in those areas which are considered too important to be allowed to be dictated by the prevailing political whim of the day.

It is a different system and a different culture, but it is closer to where we are going than to where we have come from.

What then can be done to expand the role of private or corporate giving in Australia?

Firstly, we need to determine the most suitable mechanisms for promoting giving. It is true to say that every vision requires an appropriate vehicle to become realised.

The growth of charitable trusts is a particularly Victorian phenomenon. A good deal was undoubtedly due to the Probate provisions which prevailed much longer in that State, but not all can be relegated to that.

In the United States, the fastest growing mechanism for giving is the 'Community Foundation'. More like a 'United Way' for donors, this form of foundation provides tax deductibility for individuals to make

gifts which can be administered and disbursed on their behalf by an ongoing community committee of appropriate persons.

There are good many more in the community than Ralph Sarich and Dick Smith who might be persuaded to write a large cheque if there were an appropriate mechanism in place to ensure that their gift could make an impact.

There are also a number of family businesses which have opted to make an ongoing commitment to the welfare of the community as expression of the success of their business. These trusts are often marked by the personal and direct involvement of family members in seeking out projects and monitoring the effects of their involvement.

Secondly, we need to learn to ask a lot better. I wonder if Paul Keating realised that his Christmas offer to match private giving to selected charities would result in Ralph Sarich and Dick Smith, two prominent and successful Australians, determining to donate a Million dollars each. Both men indicated that they were moved to give something back to a country which had been good to them in a way which supported those less fortunate and in a way which doubled the value of their contribution!

Someone at the Smith Family and the Salvation Army has certainly learnt to ask.

In the case of companies, a good deal of research needs to be directed towards understanding where they want to go with their involvement with the community. A good deal also needs to be undertaken at the interface between the two cultures to ensure that there is mutual understanding and expectations and that the outcomes are both clear and acceptable either way.

Thirdly, we need to look seriously at the incentives which be required to promote more giving from both the givers and the seekers perspective.

Both private individuals and companies should be able to determine how best to direct their community support in ways which have mutually beneficial outcomes. Short of direct political support, companies should be able to direct a percentage of gross operating budget before tax to community purpose. For their part, all organisations with 'charitable', but not 'Public Benevolent', should be given tax deductible status.

## WAY OUT WEST

**A** visual arts project with artists from the Mulleraterong Centre in Hamilton

Although the **Way Out West** exhibition took place on Monday 11th November 1991, the project is too good a story to overlook in these pages

The large exhibition space in the Thomson's Plaza, Hamilton, was crowded with people and the surrounding walls echoed with the wonderful visions of the artists from the Mulleraterong Centre for physically handicapped and intellectually disabled adults.

All the artists were present as Cheryl Daye from Arts Projects Australia, opened the show with some compassionate and well chosen words from her own experience with intellectually disabled artists.

The Town Clerk of Hamilton also spoke, announcing that Hamilton City Council would purchase two of the paintings from the exhibition, with another four-part piece being donated to the City by its purchaser to hang in the new Performing Arts Centre.

The exhibition ran for three weeks, one week more than planned. In all, eleven works were sold, with money going directly to the artists. Works from the exhibition have subsequently been on exhibition at the Hamilton Adult and Continuing Education building, and Hamilton Skillshare building, as well as Mulleraterong Centre itself.



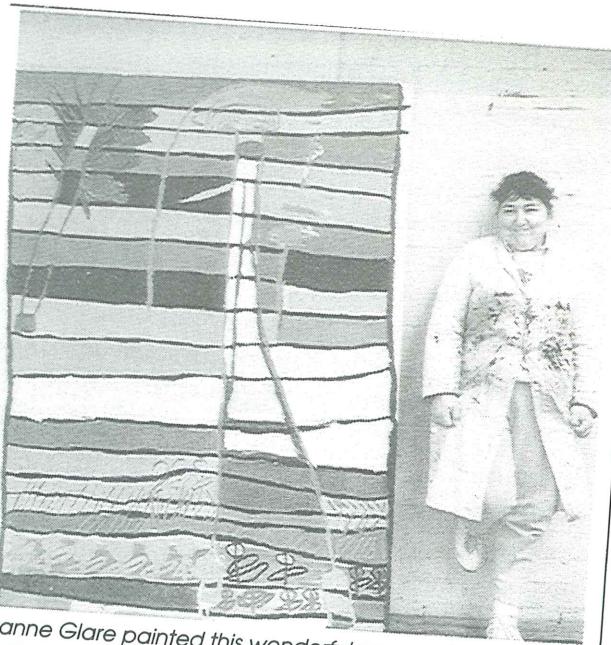
Keith Brown presents here a self portrait with arm to the left, leg to the right and much loved 'Beanie' in the centre.

The project began in late 1990, growing out of discussions with staff at Mulleraterong in relation to the enormous amount of creative energy existing at the Centre. It was perceived at the time that this potential needed a focus, and a vehicle to transport it out of the realms of 'wishing' and into the community in a strong and positive way.

Thus the project was born, developed into a studio-based concept with support from the Sidney Myer Fund. It was a joint development between the Mulleraterong Centre and Hamilton City's community arts officer, Alan McGregor.

The artists began by setting out a studio working space in a large, vacant department store in the central business area of Hamilton. The rapport between support team and the 8 to 15 artists from Mulleraterong grew into a strong bond of friendship, lifting everyone through the bleakness of Winter. There was much laughter, enthusiasm, colour, exciting imagery – and even tears.

When finally the studio part of the project came to an end after three and a half months, the output was enough to stock two substantial exhibitions. The group then entered into the final phase of preparing for the exhibition. Paintings and drawings had to be titled and given a price tag, an exhibition formally designed, and publicity and catalogue material produced.



*Suzanne Glare painted this wonderful scene of 'Lady in the Garden' as a gift to her sister.*

The last day in the workshop process was a rather solemn occasion, in a bare studio, with artwork against the walls awaiting transportation or storage, and the group of artists leaving in their mini-bus for the last time.

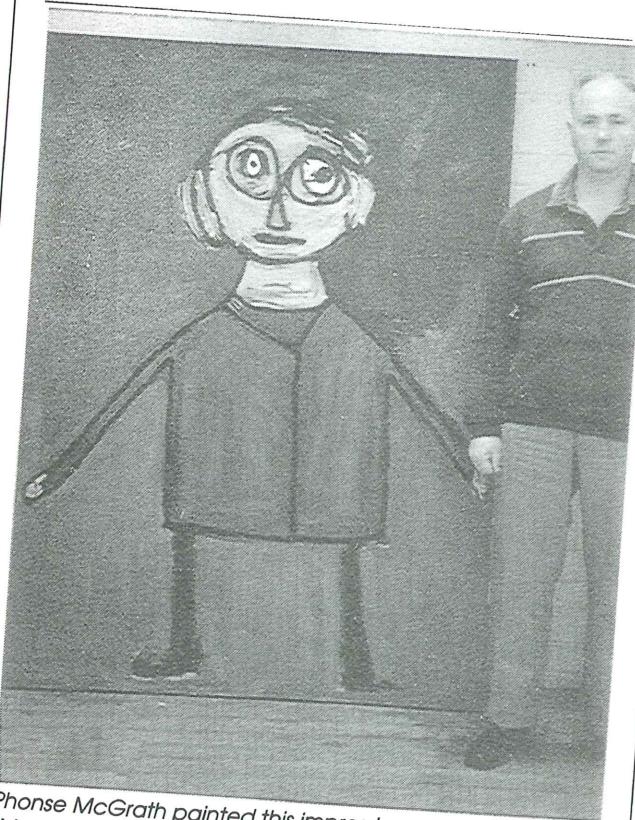
By locating the exhibition space within a busy shopping complex, the work was subsequently seen by many people with minimal arts involvement, and proved to be a positive factor in increasing local community awareness.

The project also enjoyed great community support and benefited from collaboration with Hamilton Skillshare Work Direction and Hamilton Art Gallery. The immediate support team included Angela Morgan and Julie McFarlane (Mulleraterong staff), Sally Marsden (visiting community artist) Ludmilla Wdowin (local artist) and Alan McGregor (Community Arts Officer – Hamilton).

The exhibition, as much as any other confirms that painting is a very basic, natural and necessary form of expression. It is also a complex dialogue that begins with the painter and materials, extends outwardly to colleagues and viewing public inviting our involvement, as the original vision or idea, once shared, establishes a life of its own.

The artists from Mulleraterong have not sought to impress with any aesthetic credentials – they have no artistic baggage – but have proudly share a vision of joy and energy that making art can inspire.

**Editor:** We are pleased to add to Alan McGregor's comments above that one of the paintings from Mulleraterong has recently been chosen for an international exhibition, 'Aubes 92' in France.



*Phonse McGrath painted this impression of his sister, Monica.*

# Casa Elda Vaccari Hostel: Aged care with an Italian accent

Article by Carol Cohn

A hostel for the aged which is on the State Register of Historic Buildings and is classified by the National Trust. Which has bi-lingual staff, its own chapel, a Mediterranean atmosphere, and good espresso coffee. Sounds unlikely? Perhaps. But this unusual hostel, which opened in March 1992 and which offers accommodation for 45 aged Italians, is a glowing example of what well-directed philanthropy can achieve.

Casa Elda Vaccari Hostel is located in a converted railway substation in a beautiful parklands area of North Fitzroy, and was named after Elda Vaccari, widow of the Italian philanthropist and founder of the Gualtiero Vaccari Foundation. It's the fulfilment of the personal dream of Franco Vaccari, one of Gualtiero Vaccari's two sons and a trustee of the Foundation.

Gualtiero Vaccari came to Australia as a teenager in 1912. In a remarkably short time he'd qualified as an accountant and become a leader of Melbourne's Italian community. He established the Gualtiero Vaccari Foundation in 1971.

'It was my father's dream to provide for the Italian elderly,' says Franco Vaccari. 'Before the war, the Italian community was very small. It was the influx of migration after the war that created this need.'

In 1978 – six months after the opening of a hostel for aged Italians in South Morang, built with substantial funding from his Foundation – Gualtiero Vaccari died. Now the Foundation's work is being carried on by his sons Franco and Carlo, his widow Elda, and the Foundation's fourth trustee, Perpetual Trustees Victoria Limited.

'After the establishment of the South Morang Hostel, we realised there would be an increasing demand placed on hostel space for the elderly and that the ageing Italian population would require further facilities,' Franco Vaccari says. 'In 1987 we conceived the idea of a second hostel to serve the urban Italian population, and set about locating a suitable site.'

The building in Brunswick Street, North Fitzroy – a fine piece of architecture in the Renaissance style – had been erected in 1915 by the Victorian Railways

to convert alternating current into direct current to power the system. It was decommissioned as a substation in 1968, and although it remained a state-owned asset, it had not been used again until it was discovered by Franco Vaccari and his wife Rosalie in the mid-eighties.

'When we saw this building, we thought it was absolutely brilliant,' Mrs Vaccari says. 'It was surrounded by parkland and in the middle of the long strip of land – originally railway line – which runs between Clifton Hill and Brunswick. The area had already been re-zoned by the state government for aged residential care. It was close to the city – convenient for working relatives wanting to visit residents – and at the same time the elderly people could walk to the shops, which are all Italian, if they wanted to.'

The plan for the hostel was in line with the aims of the Foundation, which concentrates on the areas of health and aged care, and education. 'This Foundation is really interested in funding, not small projects which others can do as well, but big projects which will make a tangible difference in the community,' Franco Vaccari says. 'It has no big staff, no big Board. It's a family Foundation, which makes use of the particular expertise – for example in property development – the family has.'

The Foundation's other major objective is to have the funds it commits to projects matched by government contribution. 'We'll do the work, we'll put in our share of the money, if government will do the same,' Mr Vaccari explains. 'In our view, this is a wise philanthropic investment – to make the government perform also.'

The Foundation acquired the building in 1987, then applied to the Federal Government for a special needs capital grant of \$2.1 million to restore it and fit it out as a hostel. 'We applied for special needs funding and we got it, but it took two and a half years and great persistence,' Mr Vaccari observes. 'The government didn't recognise that inner city land is more expensive to acquire than land elsewhere, nor that the Italian elderly have special needs, such as dietary requirements and bi-lingual staff.'



*The main space of the former power station provides a cathedral effect to lift the spirits of tenants at Casa Vaccari.*

\$2.3 mil. of the total cost of about \$5 mil. came from the Foundation, the government contributed \$2.1 mil., and the balance came from Southern Cross Homes – the organisation which now manages the hostel – with a small amount from public donation.

‘Having acquired a home for the hostel, we were very specific about what we wanted. We were mindful of the importance of retaining the building’s special features. And we placed it on the historic buildings register ourselves, because we wanted it to be respected and protected.’

Though not a trustee of the Foundation, Rosalie Vaccari was as committed to the project as her husband. Meeting the Vaccaris, it’s evident that they work well as a team, with interests and abilities that complement one another. Franco used his expertise as a property developer in personally assessing the building for structural soundness and suitability for conversion, and handled all the finances and government negotiations. Rosalie did the interiors, with the help of a woman who specialised in geriatric accommodation.

In designing a hostel for a population with special cultural needs and tastes, the Vaccaris had to dislodge entrenched government attitudes about what was an appropriate standard of accommodation for the aged.

‘The commonwealth government won’t commit funds to projects they deem “lavish” or “extravagant”. We didn’t want to squander money, but we didn’t want the hostel to be ugly or institutionalised, and we wanted to do justice to the building,’ Mrs Vaccari says.

The Foundation covered itself by having preliminary estimates of the cost per bed done by a quantity surveyor. These estimates turned out to be accurate to within 2% of final costs. Mr Vaccari himself

supervised the restoration, and Mrs Vaccari and her colleague put many hours of planning and legwork into the hostel’s decoration.

‘We worked to a strict budget, very much in line with what an ordinary hostel would cost. But we went to huge trouble to find suitable things,’ Mrs Vaccari says. ‘For example, by saving on soft furnishings we were able to spend a little extra on a few key things that create the atmosphere – like the piano and the billiard table, or buttoning the vinyl of the dining chairs to make it look like leather.’

Work on the hostel took five years – from 1987 to 1992 – and the result can only be described as a triumph. It is at once homely yet gracious, stylish but comfortable, full of space and light.

Apart from its noble Renaissance-style facade, the building's most notable feature is its imposing main hall, where originally heavy electrical equipment was brought in on a railway track with an overhead gantry. The hall has a line of tall arched vertical windows which produce an almost cathedral-like effect, and wide recessed balconies at first floor level.

Walking into this space now is to feel one's spirits lift. On the first floor, the right balcony has become the residents' main living and dining area. At one end stands an espresso coffee machine dispensing coffee that would grace any Carlton cafe. At the other is a small chapel, divided from the living area by a tall and ornate cast iron grille originally taken from a French butcher's shop.

The opposite balcony has been converted into residents' en suite rooms -well-fitted, attractively decorated and extremely comfortable – and more are located on the level above. There's accommodation for 45 in all, with provision for six double suites for couples. A room has been set aside where residents can do their personal laundry, and there are small private sitting rooms and kitchens where they can watch TV, entertain visitors, and do a little cooking if they wish to.

Casa Elda Vaccari Hostel is now managed by Southern Cross Homes Victoria, a charitable organisation of the Knights of the Southern Cross concerned solely with the care of the aged. In all, Southern Cross Homes provides care for more than 5000 aged Victorians in hostels, nursing homes and independent living units. The building itself – leased to Southern Cross Homes at a peppercorn rent – remains the property of the Foundation.

Hostel Supervisor Joseph Bucci – a registered nurse with intensive care training, now studying for his MBA – is responsible for the day to day management of the hostel, which is run under the guidelines of Aged Care Victoria. He has about 25 support staff, most of

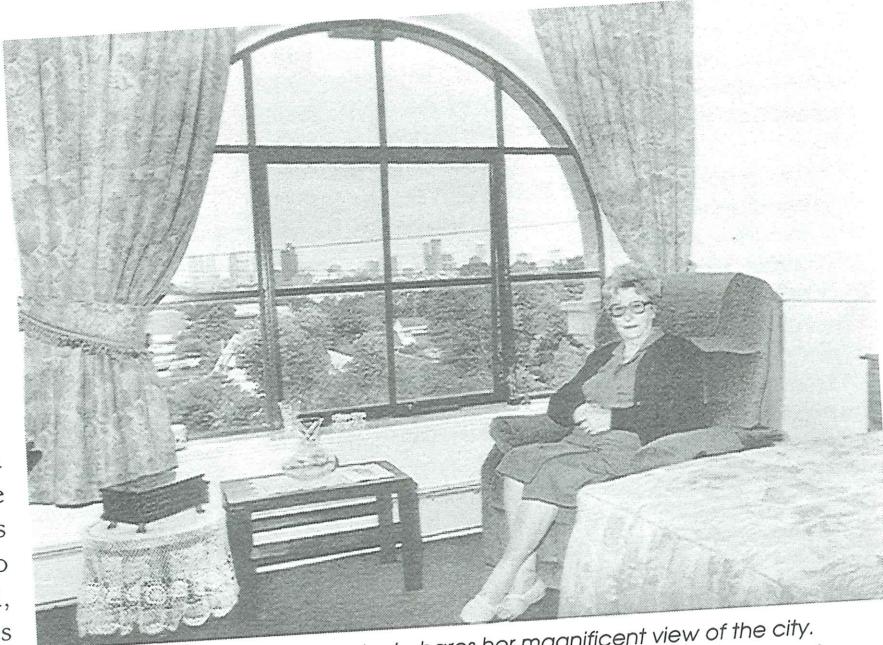
them part time. All speak fluent Italian as well as English. The cost of accommodation is based on 85% of income, with additional assets-based contributions from some residents. The present residents – half from the inner city, the others from outer urban and country areas – range in age up to 92, with an almost equal balance of the sexes.

But the Foundation's commitment to care for ageing Italians doesn't end with this hostel. 'Government now has put the onus back on Southern Cross Homes to look after the independent elderly, rather than fund nursing homes, which is more expensive,' Mrs Vaccari comments. 'This means that – although hostels like this are designed for people capable of most of their everyday personal care – many residents are much frailer than they would have been in the past. Some already suffer from mild forms of dementia.'

Recognising this problem, the Foundation has acquired an acre of land adjacent to the hostel on which a dementia unit, day care centre and eventually a nursing home will, it hopes, be built with joint funding from the Commonwealth Government and Southern Cross Homes.

'Our desire as trustees is that there be a master plan that provides for the total care of the Italian elderly' Franco Vaccari comments. 'There'll be the hostel, and all these other essential facilities, all on one site.'

One feels that if there's a philanthropists' heaven, Gualtiero Vaccari must be sitting up there now thinking, Bravo. Well done.



*Mrs. Mary Blasich, the first resident, shares her magnificent view of the city. Furnishings go a long way to establishing an Italian feel to the environment.*

# Montefiore Homes Establishes its own Foundation

Why has it taken Australia's oldest ethno specific welfare organisation 145 years to establish its own Foundation?

If the organisation turns out to be Montefiore, and the respondent is Jewish you might expect the answer to be "Why not?" – And if that person then said "Well, I think it's time the organisation did it ... it seems right," then that's just as likely to be the actual reason. Either way, it is a far cry from the notion that, "It seemed like a good idea at the time".

In earlier times, it was not unknown for bequests and gifts to simply become absorbed in the day to day running of the agency. However, as the Montefiore Homes for the Aged commences its 145th year, the Board of Management has decided that, "now is the right time to formalise its fund-raising."

Turning the clock of the history of the fledgling City of Melbourne in the Port Philip District in the colony of New South Wales back to 1848, the town of Melbourne had been operational for just four years, and, through various means, a small group of men gathered for Jewish prayers at a clothing store in Collins Street.

Later that year, on the 19th November 1848, when the Melbourne Jewish community was still only 200 people, a similar group of men met in a Collins Street tavern and resolved to establish an organisation to take care of those in their community who required assistance.

Those men subsequently sought approval and obtained land on the current St Kilda Road site for the establishment of what is known today as the Montefiore Homes for the Aged.

As a result of this, the Montefiore Homes has a number of firsts in the history of welfare services in Australia, and in Australia's Jewish community: It is the oldest Jewish welfare organisation in Australia and the oldest Jewish organisation in Australia to have maintained its original site.

Since its establishment, the Montefiore Homes has also developed into the largest Jewish organisation in Australia and from the earliest days there has always been a strong relationship between the Homes and what is now known as Israel.

The rationale for the Homes has its basis in the injunction of the Fifth Commandment to "Honour Your Father and Your Mother". The financial and voluntary assistance it has received over the years can be interpreted as the civic support of the 'Righteous'.

The history of the Jewish people, from Moses and the Ten Commandments, then a lifetime later through the First Fleet which arrived in Australia with seven Jewish convicts, then even later on to the early Jewish settlers in Port Philip District who founded what is now the Montefiore Homes for the Aged, shows the intertwining of people who have foresight for caring for "their own" in the local community.



Charlotte Forrai enjoys a shave the balloon game watched by Occupational Therapist Simone Bek.

But for Montefiore, its success as an ethno specific welfare organisation has only been achieved through a commitment from both lay leadership and professional staff to do their best for those who are cared for at the Homes.

But let's jump a lifetime of history and turn to the Montefiore Homes of today and introduce the 1000 plus members of the Montefiore family, its facilities and the services on offer.

The main site which is bounded by St Kilda Road, Punt Road, Raleigh Street and Union Street is home to about 200 residents living fairly independently in flatette style accommodation. There are about another 200 residents in our St Kilda Road Nursing Home.

On a separate site at Ashwood there is now also a 100 bed Nursing Home unit which cares for residents, the majority of whom have Alzheimers disease.

The two Day Care programs cater for nearly 250 participants, and these is a five day a week program from St Kilda Road and a six day a week program from the Rabinov Centre in Prahran.

The average age of entry into the Montefiore Homes is 84. Residents come from 17 countries and speak 26 languages. There are more than 100 residents and Day Care participants who are over the age of 90.

The program runs twenty four hours-a-day, 365 days-a-year with over 500 full and part-time staff as well as 150 volunteers. One volunteer who comes in weekly to teach some of the residents how to play bridge has her oldest student at 92!

Every day Montefiore prepares and serves about 1550 meals – the equivalent of preparing meals for five full jumbo jets.

All up, the program costs more than \$18 Million each year. More than 80% of residents are pensioners on the minimum contribution rate set by government which, in round figures, amounts to around \$13 Million from the Government with \$5 Million to be raised from the community.

Over the last decade, a new generation of lay leadership has come on to the Board and brought with them the commitment to make the Montefiore Homes as professional in its management approach as possible.

In the last two to three years, based on their experience with other organisations and looking well to the future, the Board has decided to establish a Development Office and now a Foundation to play an integral role in meeting that target, both in the short and the long term.

A challenging aspect of the legal work associated with the Foundation has been to ensure that the Foundation Trust Deed and Constitution is framed in plain English and as understandable to our supporters as possible.

So this raises the question "What is the Montefiore Homes Foundation?" In essence, the Foundation is a trust fund made up of gifts to the Foundation, investments of those gifts and any income that comes into the Foundation. The purpose of the Foundation is solely to support the work of Montefiore Homes for the Aged.

Initially the Foundation Trust Deed takes this to mean the work it does in caring for all our residents in the widest possible way. In essence Montefiore has tried to embody a charter for the Foundation that has as its primary aim the



Pictured enjoying a game of walking stick hockey are (from left) Martin Berger, Margarethe Kon, Hanna Glaubert, Sandra Keating, Emma Winnitzer and Mark Ingram.

welfare of our residents. This includes direct personal or professional care, the provision of buildings and equipment, improving the social, recreational, intellectual or spiritual environment, research, staff educational and training activities, and attending to any other aspects of the wellbeing of our residents.

Within the Jewish community, like other ethnic communities, care and honour of the elderly is paramount. And that is why the Montefiore Homes has been able to achieve a significant level of communal support during its 145 years of existence.

When the current President, Roy Tashi, first suggested the establishment of a Development Office at Montefiore, he did so with first-hand knowledge that Australia's largest Jewish Day School, Mount Scopus College had made such an office work, and he believed it would work at Montefiore.

He was able to convince his colleagues on the Board of Management that now was the time to establish Montefiore's own Development Office, and David Zerman was appointed to the task. His major role has become not only to focus on fundraising activities in the external community, but also on developing a comprehensive internal communications program to keep Montefiore's residents and staff informed of developments over our three campuses.

In 100 years, when a future Development Director of the Montefiore Homes looks back on the establishment of the Development Office, I hope that person is able to say that the Foundation framework was established in 1993 and since then, Development Directors ensured that the original objectives of those people who met in Melbourne in 1848 have been well and truly followed, that is, caring for people in need in Victoria's Jewish community.



Pictured dancing are Helen Musket, Aron Rubinstein and staff member Sandra Keating.

# Philanthropy News

## Launch of Directory



The Lord Mayor launches the 7th edition of the Directory with the President, Martin Carlson.

*The following comments were made at the launch of the 7th edition of the Australian Directory of Philanthropy by the Right Honourable, the Lord Mayor of Melbourne, Cr. Desmond Clark.*

The Australian Directory of Philanthropy has been the 'bible' amongst charities and organisations seeking funding in today's tough times.

The Directory provides access to the information required by arts and community groups about which trust or foundation is more likely to be interested in funding their cause or project.

Starting life with an initiative and funding from The Myer Foundation, the first edition was produced by the Australian Council for Educational Research in 1968. It was not until the third edition in 1980 that the copyright passed to the Australian Association of Philanthropy, which now publishes the Directory in conjunction with Thorpe publications.

In 1968, there were 226 trusts listed and in this latest edition the number has more than doubled to 450 among which the Lord Mayor's Fund is listed.

The Directory serves a clear purpose for those seeking grants, but it also provides an opportunity for those making grants to convey their intentions clearly. The existence of such a Directory means that many more organisations know where to send their applications. It also means that they should be clear about the priorities and intent of the givers, at least for the two years or more that the Directory can expect to have a life. The end result should be a higher calibre of application and less waste of time and effort because the right cause can find the right source of funds.

In these difficult economic times, when governments at all levels are forced to restrict expenditure and the number of grants available for community organisations are reducing, the Australian Directory of Philanthropy places an important role in opening up the dialogue between grant-seekers and grant-makers. It is this dialogue which will most ensure that the monies available are best spent and well directed towards those causes which can make a difference.

### **INDUSTRY COMMISSION INQUIRY INTO CHARITABLE ORGANISATIONS**

The Treasurer's announcement on 20th September 1992 that charitable organisations would be the subject of an Industry Commission brief before 1994 has caused mixed reactions. Some steps have been taken by agencies in the non government sector to question the validity of including charitable organisations in the definition of an industry. Such arguments have not persuaded the Treasurer and it is our understanding that a draft reference will be produced for consideration by the State Premiers and Federal Ministers during 1994.

In some ways the issue of charitable organisations does not bear directly on the structure of trusts and foundations, which are considered under Section 781A of the Australian Tax Act not as public benevolent institutions but as Special Provision Funds. Nevertheless, charitable trusts are required to disburse their funds to charities and any effort undertaken by the Industry Commission to clarify the nature of "charity" will be of benefit.

It appears that the brief has arisen from concerns expressed by commercial organisations at the unfair advantage enjoyed by not-for-profit organisations operating in a commercial way.

An example quoted is that of the breakfast cereals in which Sanitarium, a not-for-profit but commercial arm of the Seventh Day Adventist Church may be seen to have unfair advantage over other commercial operators.

The recent crackdown by the Australian Tax Office on sports foundations and the poker machine activities of clubs and recreation centres is setting the scene for the types of concerns the Industry Commission may be likely to tackle.

At this stage the brief for the inquiry is yet to be finalised and members of the Association will be in a position to provide an input to those deliberations at a conference to which we have been invited in November this year under the auspice of the Queensland University of Technology.

There are a number of issues which may be raised in relation to charitable trusts in the context of such an inquiry:

- the type of agencies which should be considered "charitable" for the purpose of receiving disbursements from the charitable trusts
- the need to provide a central register of charitable trusts
- any aspects of regulation that may be deemed necessary to ensure that public charitable trusts are acting in accordance with the provisions required by the Australian Tax Office in granting their tax status
- any requirements for reporting which may be deemed appropriate in monitoring the activities of trusts in the charitable area.

The Association needs to determine its position on these issues and any others that members may consider appropriate and a sub-committee has been convened for this purpose.

#### **MEMBERSHIP LUNCHEONS**

**April Casa Elda Vaccari** – Reference is made to the establishment of the Casa Elda Vaccari accommodation for Italian elderly in this edition. Members had the opportunity to enjoy the hospitality of Franco and Rosalie Vaccari of the Gualtiero Vaccari Foundation and visit on site. It is important for members to have an opportunity to hear the 'behind the scenes' stories, particularly when family trusts take on a project in a proactive way and see it through to conclusion over a number of years, not to mention obstacles.

**May Graeme Wise of the Body Shop** outlined his company's efforts to tackle problems of unemployment and homelessness by training and mentoring a group of young people off the streets. The project was deliberately developed with the Brotherhood of St Laurence in the picture to ensure that the lessons learnt could be passed onto other companies interested in taking a similar initiative. Over thirty members attended a most interesting meeting which was kindly hosted by Graham Reeve on behalf of Arthur Andersen.

**June Private Philanthropy Campaign.** The Association is embarking on a campaign to have solicitors and financial advisers raise the question of philanthropy at the time of making wills. Uerbergang, Jones and Hartley are three trusts established in Warrnambool and administered through a local solicitors firm. The luncheon was an opportunity to report to members on the campaign and to hear from representatives of the firm on the ways in which such trusts can make a difference in a regional centre.

#### **COMING EVENTS:**

**July Luncheon. Validation Therapy.** In the 9th edition of *Philanthropy*, Fiona Moore from the Stegley Foundation outlined the ideas of Naomi Feil in the article 'Validating a Lifetime'. Among her many talents is her skill as an actress and Naomi is a very entertaining and strong presenter who began Validation methods in 1963 because of her dissatisfaction with traditional methods of working with elderly people who were severely disoriented. She is not to be missed.

Besides her book *Validation*, Naomi Feil has written nine award-winning filmscripts on aging and numerous articles. She is one of the most sought after speakers in the field of aged care and has lectured extensively throughout the United States, Canada and Europe. Her Australian tour is sponsored by Eldercare inc, an agency of the Uniting Church which provides accommodation and care for 700 elderly people throughout South Australia. They can be contacted on (08) 371 0599 or by fax on (08) 371 1679 and her planned workshops during July – September are filling fast.

#### **PROPOSED CONFERENCE ON THE ROLE OF PRIVATE AND CORPORATE GIVING IN THE PURSUIT OF THE PUBLIC GOOD**

The Association is considering the timing of a conference to consider the role of private and corporate giving in framing the public good. As outlined in the editorial of this edition there is a growing interest in the efficiency and equity from a number of quarters in Australian society. We plan to develop a conference which includes the Annual Trustees Dinner during late October/early November 1993.

#### **1993 COUNCIL MEMBERS**

President: Martin Carlson OAM

Vice-President: Robin Hunt

Secretary: Jill Reichstein

Treasurer: Adolph Hanich

#### **ORDINARY MEMBERS**

Rupert Myer – Sidney Myer Fund

Darvell Hutchinson – Helen M. Schutt Trust

John Sullivan – Manager Charitable Trusts, Perpetual Trustees (Vic)

Lyn Gearing – Chairman, Giving Committee: Rothschild Australia

#### **NEW MEMBERS**

The Association is pleased to welcome the following new members:

CRA

The Body Shop

Fleur Spitzer

Gordon Darling Foundation

Rusden Foundation

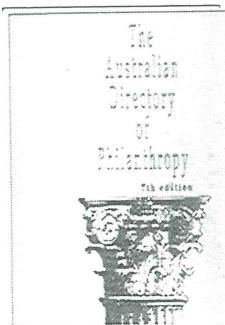
## The Australian Directory of Philanthropy (7th Edition)

– Available March 1993

Published by D W THORPE in conjunction with the Australian Association of Philanthropy Inc.

The most comprehensive reference on sources of non-government funding in Australia

- Organisations listed alphabetically in the body of the Directory
- An exhaustive index of organisations listed by fields of interest
- Accessible information about private trusts, foundations & corporate funds
- A source of basic data for those working in the sector or other related fields
- Comprehensive data for researchers in the field of philanthropy



Cost: \$40 plus \$3 postage and handling

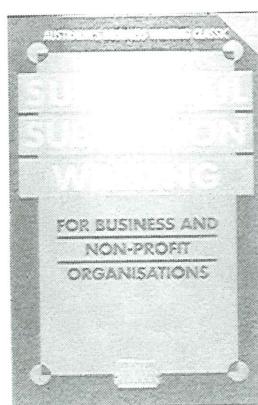
## Successful Submission Writing for Business and Non-Profit Organisations

by Jean Roberts

Having spent over a decade in the business of preparing and writing submissions, Jean Roberts has developed her own material and teaching style to assist others in this task.

Her extensive experience covers the private, public and community sectors, with her own 'Successful Submission Writing' helping to plan and implement new programmes, establish new centres and services, introduce new policies and, gradually change out-dated attitudes.

Cost: \$20 plus \$3 postage and handling  
(Total \$23 per copy)



## Philanthropy Journal



Philanthropy has a greater role to play than ever before. As the official journal of the Australian Association of Philanthropy, *Philanthropy* is uniquely placed to highlight what trusts are funding.

### \* RECEIVE VALUABLE INFORMATION

Every issue of *Philanthropy* builds your resource library of local and overseas information with advice not readily available from any other source.

### \* CASE STUDIES – HOW OTHERS HAVE SUCCEEDED IN OBTAINING FUNDS

*Philanthropy* profiles projects that have been funded with clues for your applications.

### \* KEEP UP TO DATE

Emerging trends in corporate giving ... responses to the rural crisis ... how to apply successfully to Trusts and Foundations ... youth unemployment. Just some of the subjects covered over recent editions. *Philanthropy* will keep you in touch with the thinking amongst trustees.

Cost: Annual Subscription – \$30 posted

## Charities and Philanthropic Organisations

### **REFORMING THE TAX SUBSIDY AND REGULATORY REGIMES**

Papers presented at seminars sponsored by the Comparative Public Policy Unit, Monash University.

Additional sponsorship was provided by the Australian Association of Philanthropy and the Australasian Institute of Fundraising.

Editors: Richard Krever and Gretchen Kewley

Contributors include:

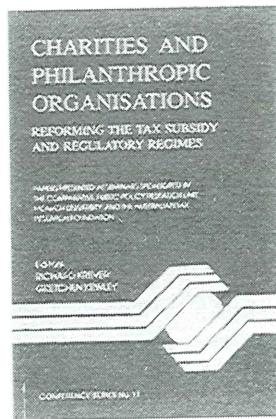
**Tax Deductions for Charitable Donations: A tax expenditure analysis** – Rick Krever

**Charities, Philanthropies, Non-profit organisations: the impact of other taxes** – Guy Noakes and Anna Carrabs

**Taxation Concessions for Charitable Bodies and Philanthropies: Administration of the Tests** – Amarjit Verick and John Lamerton

**Taxation Treatment of Charities: Distributional Consequences for the Welfare State** – Terry Carney and Peter Hanks.

Price: \$14 plus \$3 postage (Total \$17 per copy)



## "How to approach Trusts and Foundations"

### A Grantseekers Workshop

**Dates:** **Melbourne:** (venues to be advised)

- (1) Thursday, 29th July, 1993
- (2) Thursday, 25th November, 1993

**Venue:** St. James Conference Centre  
12 Batman St., West Melbourne

**Time:** 1.30 – 4.30 PM

**Speakers:** **Max Dumais**

*Australian Association of Philanthropy*

**Genevieve Timmons**

*The Lance Reichstein Charitable Trust*

**John Sullivan**

*Perpetual Trustees Victoria*

**Cost:** \$75 per participant

**\$100** for one place including the latest edition of the *Australian Directory of Philanthropy* (Seventh – March 1993). Normal Price \$40 (incl postage & handling)

or

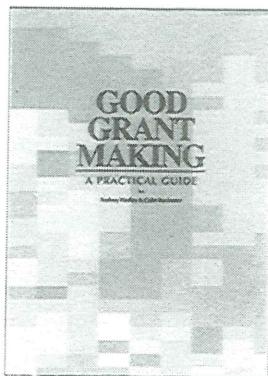
**\$120** for one place, including Directory and Annual Subscription to **Philanthropy**

## Good Grant Making – Practical Guide

A practical handbook for people administering a grant-making trust or foundation, it concentrates on day-to-day administration. The hallmarks of good administration include the effective use of people, money and material resources. Good Grant Making attempts to cover all three.

Good Grant Making deals only with the nuts and bolts of grant administration. It does not, therefore, cover other important aspects of running a trust such as the duties of trustees in respect of investment or staff recruitment. These will be the subject of other volumes.

**Price: \$15 plus \$5 postage and handling  
(Total \$20 per copy)**

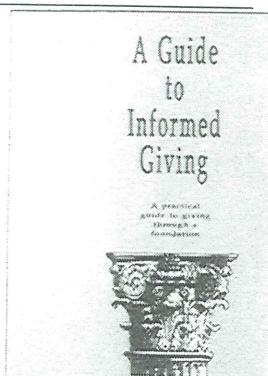


## A Guide to Informed Giving

Using a question and answer format, the Guide examines issues and options about the formation of trusts and foundations. Specifically written to suit Australia and frequent use of case studies, it includes a discussion of:

- Why become involved in Philanthropy
- What skills does a philanthropist need
- Tax advantages of gaining charitable status
- Legal structures for trusts and foundations
- How to select trustees
- Evaluation and accountability

**Price: \$55 plus \$5 post and handling (Total \$60)**



# Philanthropy

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

Subscriptions to Philanthropy are also available to non-members. The rate is \$30 per annum, post paid. (Back issues, Number 1–16 inclusive are available for \$5 per copy.)

For enquiries and 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 Vic 3000**  
**Telephone: (03) 614 1491**  
**Facsimile: (03) 614 8471**  
**ISSN: 1036-3017**

## Credits

Editor: Max Dumais

Printing: The Craftsman Press Pty. Ltd.

Typesetting: City Graphics

# 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 need 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.

## Members of the Australian Association of Philanthropy

Andrews Foundation  
ANZ Executors & Trustee Co Ltd  
Australian Bicentennial Multicultural Foundation  
Australian Youth Foundation Inc.  
Body Shop  
Brash Foundation  
Coles Myer Ltd  
Co-operative Foundation (SA)  
CRA Limited  
Danks Trust  
Ern Hartley Foundation  
Esprit Cares Trust  
Everald Compton Charitable Trust  
Felton Bequest  
Fleur Spitzer  
Flora & Frank Leith Charitable Trust  
G.M. & E.J. Jones Foundation  
George Alexander Foundation  
Gordon Darling Foundation  
Goulburn Valley Base Hospital Foundation  
Green Hills Foundation  
Gualtiero Vaccari Foundation  
H.V. McKay Charitable Trust  
Helen M. Schutt Trust  
Hugh Williamson Foundation  
Ian Potter Foundation  
J.B. Were & Son  
Lance Reichstein Charitable Foundation  
Law Foundation of NSW  
Law Foundation of SA Inc.  
L.E.W. Carty Charitable Fund  
Lord Mayor's Fund  
Lotteries Commission of WA  
Masonic Foundation (SA)  
Mayne Nickless Ltd  
Miller Foundation  
Monash University  
Morialta Trust (SA)  
Myer Foundation  
National Mutual Trustees  
Perpetual Trustees Victoria Ltd  
Pethard Tarax Charitable Trust  
Queensland Community Foundation  
Ray & Joyce Uebergang Foundation  
R.E. Ross Trust  
Robert Kerr  
Rothschild Australia  
Rusden Foundation  
Sidney Myer Fund  
Sir Albert Sakzewski Foundation  
Sir Donald & Lady Trescowthick Foundation  
Small Change Education Foundation  
Stegley Foundation  
Sun Microsystems Foundation Inc.  
Sunshine Foundation  
Telematics Course Development Fund Trust  
Trust Company of Australia  
University of Melbourne  
Victorian Community Foundation  
Victorian Health Promotion Foundation  
Victorian Women's Trust Ltd  
W.L. Allen Foundry Co Pty Ltd  
Western Institute Foundation  
Western Mining Corporation Ltd  
William Buckland Foundation

