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SPECIAL FEATURE: CITIZENSHIP

Contents

EDITORIAL 1

PROFILES

GEORGE SELTH COPPIN - THE VERSATILE
FOUNDER OF THE OLD COLONISTS'

ASSOCIATION OF VICTORIA 2

BENCHMARK OF CITIZENSHIP.
JACK TOMASETTI AND THE HUNTINGTON'S
DISEASE COMMUNITY 4

A FAREWELL TO PROFESSOR PETER O'HALLORAN
1931-1994 7

PROFILE ORGANISATIONS

THEATRE GROUP GIVES A POWERFUL VOICE TO
FAIRLEA WOMEN 9

STRENGTHENING GLOBAL CIVIL SOCIETY 13

SPASTIC CENTRES OF S.A - COMMEMORATING ITS
PAST & LAUNCHING 'FUTURE DIRECTION' 15

PROCESSES

APPROACHING THE FOUNDATIONS - A USEFUL
MODEL 18

CIVICUS CONFERENCE, MEXICO CITY, JANUARY
1995 21

ISSUES

SOMEBODY'S DAUGHTER THEATRE: A CASE STUDY
IN COLLABORATIVE FUNDING 23

REPORTS

CIVICUS: A RUSH TO JUDGEMENT IN MEXICO CITY 26

NOTICE BOARD 28

Cover Note



Cover Note -

Tracey Gary speaking at The Women in Philanthropy meeting in March, 1995. Tracey was the guest speaker at The Australian Association of Philanthropy's Annual General Meeting where members were fortunate to hear her valuable contribution.

Photo by Joyce Evans

Disclaimer

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

Editorial

In Australia, *philanthropy* and *charity* have become interchangeable much at the expense of the good name of *philanthropy*.

The gospel injunction, "Faith, Hope and Charity of which the greatest is Charity", has long since lost its impact. In the Australian consciousness, *charity* has become synonymous with *do-goodism* which, in turn, has come to represent various degrees of ineptness and various shades of misguided good intention at best, and the dressing up of scurrilous intent at worst.

In this post welfare-state era, in which *social justice* and *respect for the individual* have displaced *compassion* and the *largesse of the elite*, philanthropy is in great danger of remaining terminally unreconstructed! Certainly, for this Association which has the charter to promote and protect *philanthropy*, the task is not without its challenges.

In many ways, it is unfortunate that this popular meaning of *charity* does not follow the legal understanding of the term. Particularly in Australia, the popular or common sense meaning of *charity* has always presupposed *indigence* as a necessary condition of *charity*. In its legal sense, however, *charity* is defined as the relief of poverty, the advancement of education, the advancement of religion or any other purpose beneficial to the community.

At the recent conference on Australian Charity at the Crossroads, an erudite paper by Blake Bromley from Canada cast new light on the legal and historical precedents for our particularly Australian view of *charity*.

This definition of *charity* was challenged in the High Court and taken through to the Privy Council in 1923. The British House of Lords overruled our own High Court's more narrow or 'common sense' definition in favour of the four technical and legal aspects as outlined above. Sir Isaac Isaacs in 1926 took the opportunity to



Max Dumais, Executive Officer AAP

shift the focus from public charitable *purpose* to public charitable *institution* and, in doing so, to enshrine his own common-sense notion of charity.

It was this subtle shift that moved Australia away from the rest of the common law world by restricting *charity* for purposes of tax deductibility to what Blake Bromley refers to as '*eleemosynary charity*'. According to Bromley, eleemosynary charity is a major step forward in the legal meaning of charity, since it accomplishes the important objective of replacing a term which was difficult to define, with one which was difficult to spell!

The preliminary findings of the current inquiry by the Industry Commission into charity recommend that, rather than tinker with the notion of public benevolent institution, the benefits of tax deductibility be extended to a wider range of community social welfare organisations. It is not clear whether this distinction will do much to reinstate the broader understanding of charity and philanthropy, but it is a step in the right direction. The challenge will come when the principles espoused by the Commission are extended into the health and education sectors.

Max Dumais
Editor

George Selth Coppin - The Versatile Founder of the Old Colonists' Association of Victoria

Old Colonists of Victoria has reached a remarkable milestone with the original principles and rules under which this Association was begun, still existing today. This is largely due to the vision and energy of its founder George Selth Coppin. In researching for the 125th celebrations I became fascinated with George Coppin's life and achievements and thought it would be of interest to all those involved in the area of philanthropy.

George Coppin was born in England in 1819 into a travelling theatre company. His father had abandoned medical studies to marry an actress twice his age. As the children came along, they went on the stage, first as babies, if the play called for them, later as performers, being taught to sing and dance and play instruments. George played the violin on stage at the age of six, but soon proved to be a born comedian, and this became his established role. It was this early training that honed the young George's entrepreneurial skills as he had to turn his hand to everything: publicity, sets, landlords, the public, the actors and the money.

It was after coming to Australia in 1843 that George Coppin's career really flourished. He became known as a talented comedian on stage as well as being the manager, producer, owner and sometime builder of theatres. Off stage Coppin's financial success was varied to say the least. Ever on the look-out for new openings, he bought his first boat, the packet schooner "Apollo". He wanted to sail her to India, but his wife was most unwilling, so instead, he established a regular boat service to Portland and Port Fairy. His vessel eventually gave her name to Apollo Bay and her Captain, Loutit, to the bay where Lorne now stands. He also started to take an interest in politics during the movement for secession of Port Phillip from New South Wales.

Coppin's life was so full and varied that to go into detail would require a book, so before I go to his role as the founder of the Old Colonists' Association of Victoria, I will briefly summarise some of his other notable and interesting achievements.

Known as "The Father of Australian Theatre", George Coppin put Sorrento on the map; staged the first Balloon ascent, became a parliamentarian - local and then legislative; imported camels, some of which were used on the Burke and Wills expedition; was founder of the Freemasons in Australia; began St John's Ambulance Association; was responsible for setting up the Victorian Humane Society; started Gordon House for homeless men; - the list goes on, but I am sure the pattern of energy, drive and versatility is obvious.

It was in 1869 that George Coppin called a meeting of prominent wealthy old colonists with the aim of establishing an association to house 'the old and decayed' actors. George Coppin was very concerned at the numbers of elderly people who, being far from England and family, were left to fend for themselves and as a result were living a life of poverty and destitution. The Association was officially formed and given six acres of land at North Fitzroy by the Crown, where cottages were donated and built and a weekly pension paid to the nominated residents.

The housing of retired actors developed into the housing of all needy and necessitous elderly people, and to this day the original cottages still stand, with all their charm and history.



The George Selth Coppin Memorial Cottage, 1928

Today, George Coppin's vision has not only lasted but grown to encompass three other estates situated at Greensborough, Berwick and Euroa with the recent purchase of seven hectares at Chirnside Park for a fifth estate. There are two hostels, housing seventy-eight frail elderly people and a thirty-bed nursing home, contributing to accommodation for around 500 elderly people.

For a charity that is a totally independent, gift-supported organisation to have survive 125 years, and to have grown,

shows a vision and a down-to-earth philanthropic approach that were ahead of their time and of which George Selth Coppin would be justly proud.

For further information:

Antoinette James, Co-ordinator - Tel : (03) 481 7466

The Old Colonist's Association of Victoria

Established 1869

Care and Security for the Elderly

Victorian Consumer Credit Education Trust

Background

The Victorian Consumer Credit Education Trust was established in January 1994 to provide public education in matters relating to the provision and use of personal credit and consumer financial services.

The primary objective of any activities funded by the Trust is to foster Victorian consumer education, so that credit users can make informed choices and decisions.

The term 'credit user' has been defined for the purposes of the Trust to mean people who borrow for personal consumption or are presently managing private debt.

Purpose of Grants

Grants from the Trust will be allocated for:

- production and distribution of written materials on credit use, to be used by the general public, particular target groups or the media.*
- presentation of relevant credit information in the form of training, community consultation, public speeches, or other forms of interaction with a view to promoting greater awareness of the needs of consumer credit users.*
- special research projects to investigate matters related to consumer credit use.*

Eligibility

Applications are invited from non-profit organisations and groups which are based in Victoria and legally incorporated. Grants will not be given to state or federal government bodies, profit-making organisations, or individuals except where there is an established partnership with a relevant organisation.

Priorities

In general, the Trust will give preference to innovative proposals based on sound strategy, which address contemporary issues in a timely way. Priority will be given to projects that recognise the needs and build in the contributions of people who are:

- of non-English speaking background*
- Aboriginal*
- illiterate*
- on a low income*
- or have an intellectual, physical or psychiatric disability*

Assessment of Proposals

The Board of Trustees is made up of representatives from the finance industry, the State Government Office of Fair Trading, and community consumer organisations. In order to ensure that grants are used effectively, the Trustees may refer to outside experts for comments.

For further information and to apply for funds

Victorian Consumer Credit Education Trust

Phone: (03) 650 8384

Benchmark of Citizenship

Jack Tomasetti and the Huntington's Disease Community



Jack Tomasetti just before his African adventure in 1916. An innovator, business man and philanthropist, he believed that looking after people was every citizen's responsibility.

Jack Tomasetti was bound for a Kenyan sugar plantation - an unusual move for a 16 year old in 1916. Sheer madness, some would have said. But what it showed was a rare spirit of adventure, optimism and fearlessness which if channelled could become a real driving force.

Jack's natural compassion and vision gave him the ability to see 'the big picture' and his own role within it. He was a genuine philanthropist and a true citizen who really made a difference to many people's lives.

After years of managing plantations in Fiji and Kenya, Jack returned to Australia to start an import-export business. *Tomasetti & Son* remained his financial backbone and, together with his passion for the stock exchange, provided the springboard for his philanthropic activities.

Jack Tomasetti firmly believed that it was every citizen's responsibility to help others who were not quite so 'lucky'. His gifts were often practical, responding to real needs. His daughter, Louise Innes, relates: "one Melbourne winter's day, the children from the orphanage were walking to school without gloves. Dad was just appalled. He bought a whole lot of woollen gloves - all different sizes - and took them around there that night. He used to do that sort of thing often."

He wanted no recognition, no credit - giving was just something people should do if they were able. That philosophy gave him the mandate to ask others to also dig deep. "Dad was never one to miss an opportunity," says Mrs Innes. "When he heard that his best friend's racehorse had won, he was on the phone within seconds asking him to donate a percentage of his winnings. It's called the direct approach."

Jack Tomasetti gave generously to many causes and groups, but developed a very special and long-term association with the little known Victorian Huntington's Disease (HD) community.

He first became involved in 1972, fascinated by a report on funding cuts to HD research on ABC's *This Day Tonight*. The National Health and Medical Research Council was to discontinue the genetic research that was in search of a blood marker. Merely locating it would neither cure HD nor curtail symptoms, but it would indicate whether or not the defective HD gene had been passed on. This knowledge would help those 'at risk' either plan for their illness, or give them the confidence and security to get on with their lives. The first important HD research attempted in Australia, it was the key to unravelling the mysterious disease.

The report inspired Tomasetti on a number of levels. Jack the businessman thought that quitting such research was wasteful, shameful and ridiculous; his humanitarian side was stirred - he had never heard of HD, a disease that hung

over the heads of so many families for generation upon generation; and an eternal optimist, his imagination was captured, envisioning the day when a cure would be found. Jack the philanthropist responded by funding the research for a further 12 months.

Always a willing donor, he still had to be convinced that his money would be put to good use. Betty Teltscher, a volunteer fundraiser for the Australian Huntington's Disease Association (Vic) (AHDA), recalls the exhaustive and arduous discussion that was required to convince him to donate a bus for those people with HD attending Arthur Preston Centre day care. Although he really put her through the wringer, it was the sort of project that really appealed to him: a bus would give independence and freedom to people who, through illness, were thoroughly dependent on others. He bought the bus for the AHDA in 1979.

Still, Jack's greatest gift to the Huntington's community came with his substantial bequest. Like their benefactor, the AHDA also had a vision of care that was based on quality service, understanding and upholding human dignity. For nearly ten years, the Association had a blueprint for a residential facility and just needed some kind of input to get the ball rolling. The HD community house, aptly named Tomasetti House, was officially opened on 24th January this year - 1995.

Tomasetti House is a four-bed residential facility specifically for people in the early stages of HD. Providing communal housing for this group, is a new approach - in fact, it's a world first. All too often those in the early stages are overlooked, mainly because the needs of those in the later stages are so dire and resources have been limited. It is when symptoms first appear however that patterns for coping are established, so giving the right type of support from the onset is crucial.

The symptoms of HD usually occur between the ages of 35-45, when children or teenagers may still be living at home and partners are at the peak of their careers. For whatever reason, many families can not provide the care and support that someone with HD needs. Tomasetti House gives HD families another option. Kaye Gallagher, President of the AHDA, summed up the advantages: "Tomasetti House provides a loving environment for people with HD while they can still make valuable contributions. Support from peers who are encountering similar adjustment problems, can only inspire confidence and independence."



Kaye Gallagher at the official opening of Tomasetti House. It was a proud moment for the AHDA and a milestone in community health care.

The AHDA has arranged special social activities for Tomasetti residents, and will provide professional guidance where appropriate. There is also on-the-ground support provided by a lead tenant who is an experienced HD carer.

Tomasetti House is a great example of community and citizenship. Jack Tomasetti's generous bequest breathed life into a dream, and then through the tireless efforts of the AHDA, support and assistance snowballed. The Victorian State Government (Department of Planning and Development) donated land, the AHDA committed its own funds, organised fundraising events (e.g. a dutch auction, 'Buy A Brick' campaign, telephone canvassing and membership drives) and inspired local small businesses and individuals to contribute.

The project is the embodiment of all that Jack Tomasetti stood for: citizens taking responsibility for their own and a practical solution to a pressing need. A benchmark of community care, the Tomasetti model is an holistic approach to health care - support for carers and families and a home that will maximise the quality of life of people with HD.

Louise Innes has no doubts about how Jack would have regarded Tomasetti House: "It's something he would have been really proud of. Freedom and independence were everything to my father. He hated to think of anyone being trapped. It's a funny thing, as kids we didn't really understand Dad's philanthropy, but it's staggering the difference that his money has made to the Huntington's community. It's just given so many people renewed hope."

By Donna Sue Robson

What is Huntington's Disease ?

Huntington's Disease (HD) is a genetic brain condition which causes a gradual loss of control of the involuntary muscles. There are often emotional and cognitive effects too: people may lose their ability to plan and organise, may suffer from short-term memory loss, become moody, irritable and suffer from organic depression. Symptoms usually

occur between 35-45 years of age. The condition will degenerate over a period of ten or twenty years until finally, the person with HD will not be able to walk or talk and will find eating difficult.

There are at least 10,000 Australians affected by HD, which includes families caring for those afflicted and those 'at risk'. If it is in the family, children have a 50 per cent chance of developing it. Ten years after the blood marker was detected (1983), the actual gene was discovered. This resulted in a more accurate presymptomatic test to determine whether or not the gene has been inherited.

For further information

on Huntington's Disease
or Tomasetti House
AHDA-Tel. (03) 563 3922

GRANTSEEKERS' WORKSHOPS 1995

Basic and Advanced

Basic:

Melbourne September 21st

Rural Vic August 25th

Sydney June 22nd

Perth May 1st

Brisbane October 19th

*Workshops provide
participants with
effective techniques on*

*how to approach
corporates, trusts
and foundations*

Advanced:

Melbourne June 1st

November 2nd

For further information please phone:
The Australian Association of Philanthropy on (03) 614 1491

A Farewell to Professor Peter O'Halloran

1931 - 1994

Peter O'Halloran died in his sleep early on Sunday morning - 25th September 1994. A short time before, he learned that he had been awarded the World Cultural Council's award for 'Educator of the Year'. He was far too weak to travel, and his eldest daughter and son travelled to Paris to accept the award on his behalf - a recommendation for his appointment to a Special Professorship on the University Council. Sadly, it could not be acted on in any real sense.

The University is full of talent - as of course it should be - and that talent covers an amazing range of human knowledge and experience. But I can think of few who have Peter's combination of vision and persistence. That combination, plus the support of a handful of colleagues, produced the Australian Mathematics Competition, the largest of its kind in the world, with more than half a million entrants, and the model for very many others.

A person's vision can never be completely understood by those who come afterwards, and see only the results of the vision. The visionary sees at the beginning what is not, and what might be. He hears doubts, and objections, and argument. To work for the vision, to inspire others to work for it, and to overcome the doubters, demands persistence, not for a day, or for a week, but forever.

Peter had that spirit. More, he was wonderfully inventive, perceptive and lateral. He saw not merely the competition, but how it might be organised, how competition questions might be developed, how voluntary committees in each state and territory might be assembled, and inspired others to do the same. There are now thousands and thousands of people who are involved in the Competition and in the other activities of the Australian Mathematics Trust, the umbrella organisation he helped set up, who do what they do because, originally, Peter asked them to help.

As the whole thing grew in size and in scope he brought new activities into being, found people to work in them, and companies to sponsor the outcomes. He knew how important it was that the Competition and the other Trust activities have high status, and he persuaded Governors-General and State Governors to lend their patronage and their residences for the celebratory events, such as the prime minister's awarding of the traditional green and gold blazers to the members of the Australian team to contest the Maths Olympiad in Hong Kong. It was an hour in the day of the PM which Peter had somehow fixed up, and it was superb media coverage for the Trust.



Students at Regent College, WA participating in the Westpac Mathematics competition



Students from Malabunga High School, Rabaul PNG, are seen comparing their responses to the questions

Like many of those who changed the world, he could sometimes be a difficult person to manage. He seemed to work all the time, and he was an amazingly successful networker, equally adept with the telephone, the aeroplane, the fax, electronic mail, the cocktail party and the seminar. Given the spread of his ideas and the reach of his network, it was often hard to keep up with where he had been, what the new project was, who was involved, and where it was heading.

But none of his critics, and he had them, denied his achievements. To people in other countries he seemed almost a giant, a figure from legend and fable. People of great eminence in mathematics (a status he would never have claimed for himself) saw him as being of enormous importance to the world of mathematics because of what he had done for the discipline, and deferred to him with great respect. He enjoyed the attention he received, but didn't quite believe he deserved it. His over-riding interest was in the Trust and its manifold and ever-growing activities, not in himself.

Peter O'Halloran was at heart a simple man who had a huge, almost revolutionary, idea. Every child has to do mathematics throughout school, and Peter thought that you could make that experience fun, and improve everyone's performance at this central and vital discipline,

if you made mathematics enjoyable by placing it in the context of a competition where schools competed with schools. If it was not a completely original idea, Peter's realisation of that idea in Australia was indeed original, and it has been a stunning success. The French, one of many imitators, paid their debt with a fine compliment, terming their own competition, now the second largest in the world, "Le Kangourou de Mathematique".

To be cut down at the height of his achievement could have seemed a bitter irony, but Peter accepted philosophically and with some humour the inevitable conclusion of the virulent cancer which invaded him. To Marjorie and their children the University offers its love, and respect, and sympathy. What he has done will grow, and his name will grow with it.

Professor Don Aitkin

Chair, Australian Mathematics Trust
Vice Chancellor, University of Canberra.

This article was printed in the Monitor - University of Canberra newspaper

Theatre group gives a powerful voice to Fairlea women

In 1980 a young drama student from the Victorian College of the Arts visited Melbourne's Fairlea Women's Prison to perform in *Female Transport*, a play about early women convicts transported to Australia on the hulks. What she saw there moved her deeply and changed her life.

"Women prisoners came up to me and said, 'Please do some drama here, we're desperate', Maud Clark recalls. "They were incredibly articulate, middle-class women. And it was like looking in a mirror."

At that time conditions for female prisoners were worse than they are now. Many were separated from their children, partners and families, and life in Fairlea gave them little outlet for emotional or creative expression. Then, as now, 80 to 90 per cent were there for drug-related offences, and most had histories of sexual and/or physical abuse. "Being a prisoner was being powerless, voiceless and nothing."

With fellow students Greg Sneddon and Stella Tarrent, and with the permission of the prison authorities, Maud Clark went back into Fairlea to run workshops in drama and improvisation.

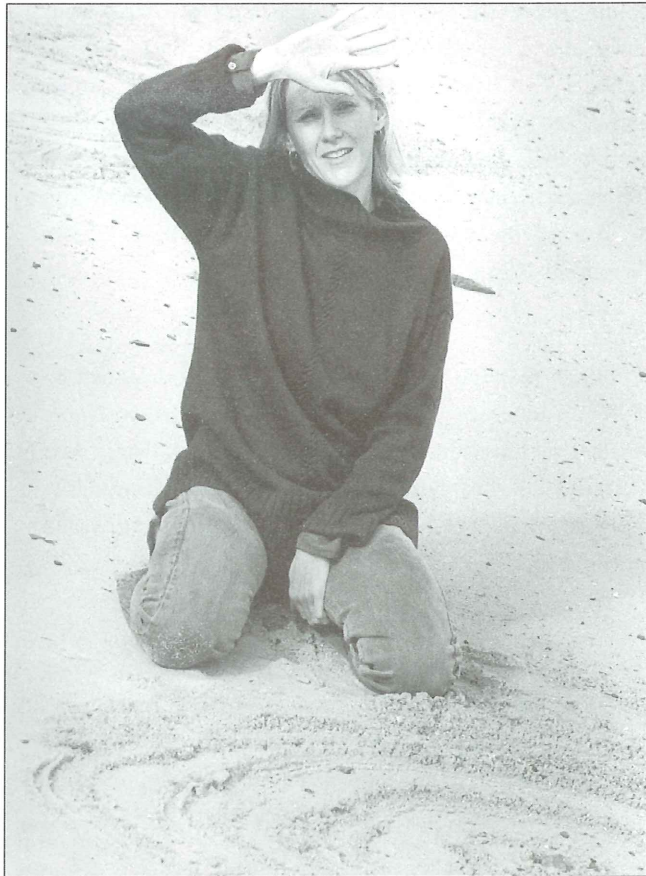
"What we found then was that women really needed to get their stories out. They needed, as it were, to process their experience but also to know that someone was actually listening and saying, 'That's really interesting'. And this was validating their lives. We also realised that there was no existing documentation of women's experiences in gaols."

Those early workshops inside Fairlea were the first seeds of the Somebody's Daughter Theatre, a venture which this year earned Maud Clark the \$25,000 Ros Bower Award for achievement in community arts.

Maud Clark is a fair woman with a slender mobile face and expressive voice and gestures. Both actor and director, she's articulate and serious, and has carefully thought out ideas about the value and purposes of her craft.

"I'm interested in creating a theatre that makes people bigger, not diminishes them. Very little theatre interests me. The only theatre that interests me is theatre that contacts my spirit as a human being and takes me further in some way."

For Maud, Greg Sneddon and others now involved with the Fairlea group - including art director Sally Marsden and administrator Carey Lai - the project has indeed been a journey. By exploring themes such as imprisonment, drug addiction, loneliness, agony of separation, abuse and deprivation, it has broken new theatrical ground and given a powerful voice to women whose most compelling early experiences have been of abuse and disempowerment.



Maud Clark, founder and artistic director of Somebody's Daughter Theatre.

Somebody's Daughter Theatre has evolved slowly from workshops to full productions written by the women in collaboration with Maud Clark, and performed within Fairlea. These set the pattern for subsequent productions in the way they blended drama, music and song into dramatic wholes which explored themes such as imprisonment, drug addiction, loneliness and the agony of separation, and early experiences of abuse and deprivation.

In 1991 the group was incorporated as the Somebody's Daughter Theatre and the following year it went public. With the support of the Playbox Theatre and sponsors including the Reichstein Foundation, the Sidney Myer Fund, The Australia Council, Dame Elisabeth Murdoch, the Victorian Women's Trust and the William Buckland Foundation, *Tell her that I love her ...* was staged at the Malthouse in South Melbourne.

The grant from the Victorian Women's Trust later led to Maud Clark's receiving in 1993 the Ewa Czajor Award, made to professional theatre directors and administered trusts.

After a successful first run, *Tell her that I love her...* went on to a second season in 1993 and was placed on the schools' list. It was swiftly followed by *Call my Name*, which ran over September and October, 1994. More hard hitting than *Tell her that I love her ...*, *Call my Name* originated in performances given by members of the group as part of the unsuccessful campaign to keep Fairlea Women's Prison open.

Publicity material for both productions was designed by Fairlea women and, concurrently with the *Call my Name* season, a collection of their art works was shown at Arts Access Studio in South Melbourne. This was extraordinarily powerful work, much of it disturbing, some of it lyrical and celebratory.

Because prison regulations still prohibit women under sentence from leaving Fairlea to perform with the group, all roles have been taken by ex-Fairlea prisoners, some released only weeks before, others involved with the group since the early '80s.

Aged from 18 to 40, the women come from a diversity of social backgrounds and some are still struggling with their addictions. For the production crew, to get a production on stage and at the same time support cast members through hard emotional times can be a great and sometimes heartbreaking challenge. *Call my Name* is dedicated to two members of the group, Janai Newenstein and Rikki Dewan, who died while the show was in production.

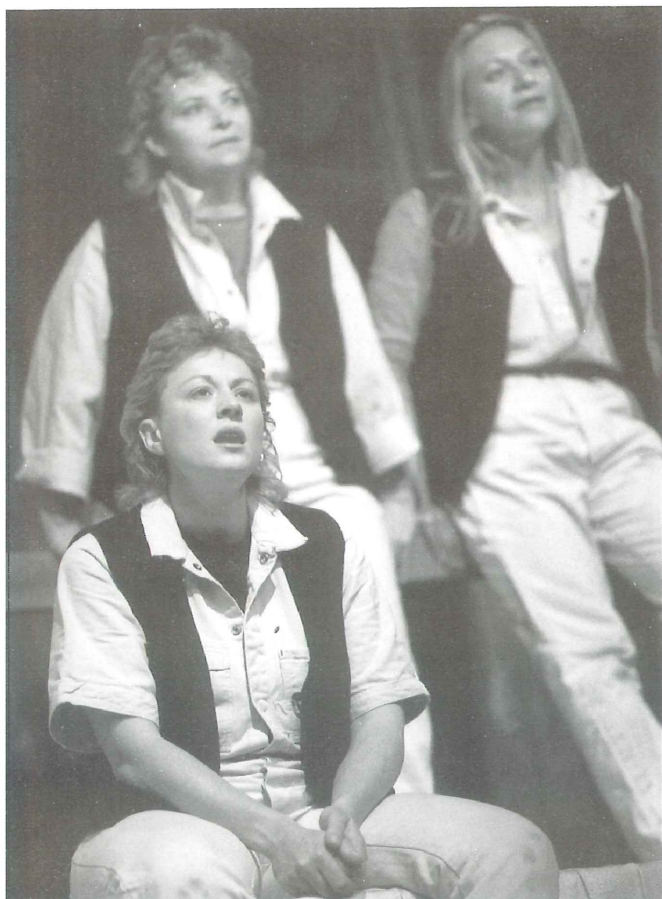
For women whose sentences are well behind them, Maud Clark says, there is the different, "incredibly difficult" challenge of revisiting painful past experiences - "of going back and entering again those spaces where they were completely powerless".

Helen Barnacle was one of the founding members of the Fairlea drama group and has journeyed far since those days. Sentenced to seven years on a drugs conspiracy charge in 1980 when pregnant with her first child, she was the first Fairlea prisoner permitted to keep her child with her in prison beyond the age of five. She commenced work towards a BA while in Fairlea, then went on to complete a Graduate Diploma in Applied Psychology. In 1990 she was employed as a counsellor with the Drug Taskforce, a community-based agency in Prahran, and is now Manager of its drug program.

Helen is a handsome woman with strong aquiline features and a powerful personal presence, and it's difficult to believe that in her early Fairlea days she "couldn't speak in groups, couldn't perform in front of people". Engaged in a battle to keep her baby with her, at first she had little interest in the drama group and didn't believe she could act or sing.

She had a musical background though, and Greg Sneddon encouraged her to write a song. "I kept saying, 'I can't write a song', and he said, 'Yes, you can', And you don't get that kind of positive reinforcement anywhere in prison. So I did write a song and I did sing."

Since then she has written and performed many songs, and in *Call my Name* she plays the role of Maddy, a character closely based on her own experiences as a mother, prisoner and addict.



Three cast members from *Call my Name* - Tracey as Indi, Marg as Vita and Cheryl as Nat.

In prison, she says, "you become very detached, very isolated, go very much inside yourself." And she still feels the need to give expression to emotions and experiences which prison life forced her to suppress.

"It's very healthy really, that after you get out there's a place where people understand, where you can cry and express your anger.

"And it does break down the barriers, especially for women who are mothers - because people have very prejudiced ideas about that, perhaps because most know little about addiction and the backgrounds that produce it."

One of the great values of Somebody's Daughter Theatre is its ability powerfully to dramatise the life experiences that can lead to addiction and imprisonment, and the Playbox productions have brought this message to a wider audience. "We the members of the group have a lot of power to portray the issues that brought these women there and that they're still going through, experiences that most people wouldn't know about."

The administration of Somebody's Daughter Theatre is under the direction of Carey Lai. Before becoming involved with the group in the mid-80s, Carey worked for Arts Access for five years as Senior Projects Officer and her expertise in arts administration, especially in the "time-consuming and sometimes frustrating" process of grant applications, has been of immense value.

Carey has steered the group through the process of becoming an incorporated body and more recently in obtaining tax deductibility status. This is a significant step in its continuing search for funds, since tax deductibility is a condition for funding through at least some trusts and foundations, such as the Ian Potter Foundation.

Financial support for Somebody's Daughter Theatre Inc. has now come from many sources including the the Victorian Women's Trust, the Myer Foundation, the Ross Trust, the Victorian Health Promotions Foundation, Arts Victoria, the Reichstein Foundation, and more recently the Sunshine Foundation.

A grant of \$20,000 obtained through the Australia Council has just gone to produce a promotional video. This is being produced in two versions - a longer cut which will be used to publicise the project to other community arts groups, and a shorter version to be used as a funding tool. With funding from the Stegley Foundation, Helen Barnacle is presently working on a book about violence against women, based on the experiences of Fairlea women and some of her Drug Taskforce clients.

The group has been successful in obtaining funds from a diversity of funding bodies. "There is a long history to the workers in the group, especially Maud, Greg and Sally - they've worked with the women in prison for a long time now and they have enormous credibility," says Carey Lai.

Carey believes this credibility, and the commitment of the principals to the project over many years, have been important factors in the search for funds. "It's not like somebody coming up with a nice idea and the arts community itself thinking, Oh yes - well who are you?

"And also there is very little support available for women coming out of prison, and I think this group has been seen as offering something very concrete and very real, and unique in the opportunity it offers to these women to express their creativity."

The public face of the group gained through its two Playbox productions has increased its appeal to funding bodies. "Somebody's Daughter is now well known - it's acquiring quite a following - and this must be very attractive to funding bodies because they know they're going to get some profile out of it."

To date funding has been on a project-by-project basis. "We're not yet at the stage where somebody says, Look, here's funding for five years - and the hand-to-mouth existence can get very difficult," Maud Clark observes. "Without a last-minute grant of more than \$20,000 from Dame Elisabeth Murdoch, it would not have been possible to stage *Call my Name*."

"But then you see the results and you know that it's really important and it seems fated that you keep going."

Somebody's Daughter has plans to merchandise itself through booklets designed and illustrated by the women which have been produced and sold for each of the two Playbox productions, and there are plans afoot to produce a CD from the sound tracks of the two shows. There is also interest in the possibility of taking *Call my Name* to Sydney.

Meanwhile the group's work continues within Fairlea. *Another Kind of Freedom* was produced in the prison early this year. The drama workshops go on, continuing to validate the belief that got the whole thing rolling fourteen years ago.

"People can do anything if you believe in them enough," Maud Clark asserts. "And they do, they do."

By Carol Cohn

Philanthropy 25

Winter

Philanthropy is soon to publish its 25th edition. The first edition, under the direction of Marion Webster and Jane Sandilands was produced in April, 1989.

At that time, the stated aim was 'to cover a broad range of topics of interest to the philanthropic community'. The hope was to feature an innovative funding project in each issue along with a cross section of articles recounting activity in the philanthropic world.

The success of the journal began on informative and fertile grounds.

The Association is proud to have grown twenty-three editions since that time, each carrying stories of philanthropy and the many messages they deliver.

Philanthropy 25 - Winter will be published in June 1995 and we invite you to celebrate this milestone with us by providing articles of particular significance that you wish to communicate to our readers.

This could be in the form of the profile of a philanthropist, project, issue or event. We welcome and look forward to your contributions.

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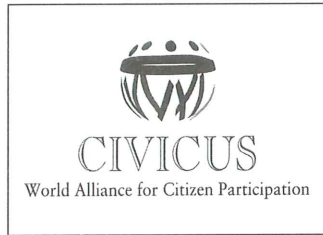
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Strengthening Global Civil Society



CIVICUS is an international alliance of organisations and individuals to strengthen citizen action and influence throughout the world through voluntary initiative, philanthropy and community service. It was formally launched in May 1993 with the first meeting of the founding Board of Directors in Barcelona.

Why is CIVICUS needed ?

The creation of CIVICUS was a recognition of the world-wide explosion of third-sector activities. Globally there is a dramatic resurgence of citizen initiative and participation to strengthen communities and nations. This resurgence takes various forms of citizen associations, people's movements, voluntary organisations, non-government organisations, philanthropy, mutual assistance groups, etc. Traditional charity and philanthropy and the underlying moral of giving and patronage are giving way to a new sense of partnerships, independent social actions, and citizen initiatives for the public good. Various networks and associations of these initiatives at the local, national and regional levels have emerged in different regions of the world. There has been a growing need to bring together the diversity of actors of active citizenship. Out of this need has come **CIVICUS: World Alliance for Citizen Participation**.

What is CIVICUS ?

CIVICUS is a major attempt to create an institutional framework to promote active citizenship and civil society on a global scale. The founding precept is that 'effective societies exist in direct proportion to the degree of citizen participation and influence.'

CIVICUS will provide an open forum for discourse, an international dialogue of views from a range of leaders, institutions and cultures. It will work to facilitate and encourage this kind of dialogue, providing structure and linkages for gathering information on international

philanthropy and the rapidly burgeoning voluntary sector. It will become a world organisation dedicated to civil society, voluntary action, pluralism, philanthropy and community service.

What makes CIVICUS different ?

The uniqueness of CIVICUS is that it includes both donor and donee organisations, it includes the total of the nonprofit nongovernmental sector and is global in nature. Such a wide constituency represents a conceptual innovation that opens new opportunities for dialogue and common action. CIVICUS must gain recognition and legitimacy on the local and regional levels. This is why CIVICUS has started in the regions with reports and meetings on the status of the third sector. The regional reports include: Asia/Pacific, Latin America and Caribbean, Africa, Middle East, Eastern and Western Europe and North America.

CIVICUS serves:

1. Local, national, regional and international non-government organisations, voluntary citizen organisations, foundations and associations.
2. Grantmaking organisations interested in international projects and programs.
3. International development organisations working with non-government organisations.
4. Governments interested in cooperation with citizen groups and organisations.

World Assembly

The first official World Assembly of CIVICUS was held in Mexico City, in January this year. Two reports arising from the Assembly follow in the reports section.

Participation

Currently participation is emerging from far afield. Amongst the funding sources are Charles Stewart Mott Foundation, Ford Foundation, W.K. Kellogg Foundation, Carnegie Corporation, European Foundation Centre, Manuel Arango, Mexican Centre for Philanthropy, The Rockefeller Foundation, Charities Aid Foundation - Great Britain, Foundation de France, European Cultural Foundation, Rockefeller Brothers Fund, IBM Corporation and the Hitachi Foundation.

Membership ranges from individuals to one of the largest groups of nonprofit organisations in Europe and encompasses geographical and cultural diversity. CIVICUS focuses on the similarities between citizen groups, rather than their difference. Members have in common: a **commitment to increasing citizen activity and influence.**

For further information

CIVICUS

World Alliance for Citizen Participation,
919 18th Street, NW, 3rd Floor
Washington
DC 20006 USA

**CHARITY AT THE CROSS ROADS -
CONFERENCE PAPERS**

The papers delivered at the conference in November are now available in print form. In the light of the closing date of January 31st, 1995, set by the Industry Commission for response to the Preliminary Report, these papers have been collated, in their entirety, into book form for ready use. Summary documents of some of the proceedings, which draw together some of the common threads emerging from the conference, are also included.

The papers cost \$ 30 posted.

If you would like to purchase these papers, please contact The Australian Association of Philanthropy Inc. on (03) 614 1491 for an order form.

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Spastic Centres of SA Commemorating its past & launching 'Future Directions'

"Over many years Spastic Centres of South Australia has come to appreciate the fact that no matter what the physical ability may be, given the right opportunity and support, people are able to have a say in their own lifestyle—what they would like to do and when they would like to do it."

Trevor Harrison who was a consumer of Spastic Centres of South Australia services from the age of 2° until he was 16, is now on the Spastic Centres of South Australia Board of Management and was speaking to over 300 invited guests when Spastic Centres of South Australia launched its Future Directions plans.

Special guests included His Excellency the Administrator of South Australia, Dr Basil Hetzel AC (in the absence of Her Excellency the Governor, the Hon. Dame Roma Mitchell AC DBE); the Minister of Health, the Hon. Dr Michael Armitage; Spastic Centres of South Australia president, Mrs Anne Skipper; the then executive director of Spastic Centres of South Australia, Vic Symons; and Trevor Harrison who spoke on behalf of consumers.

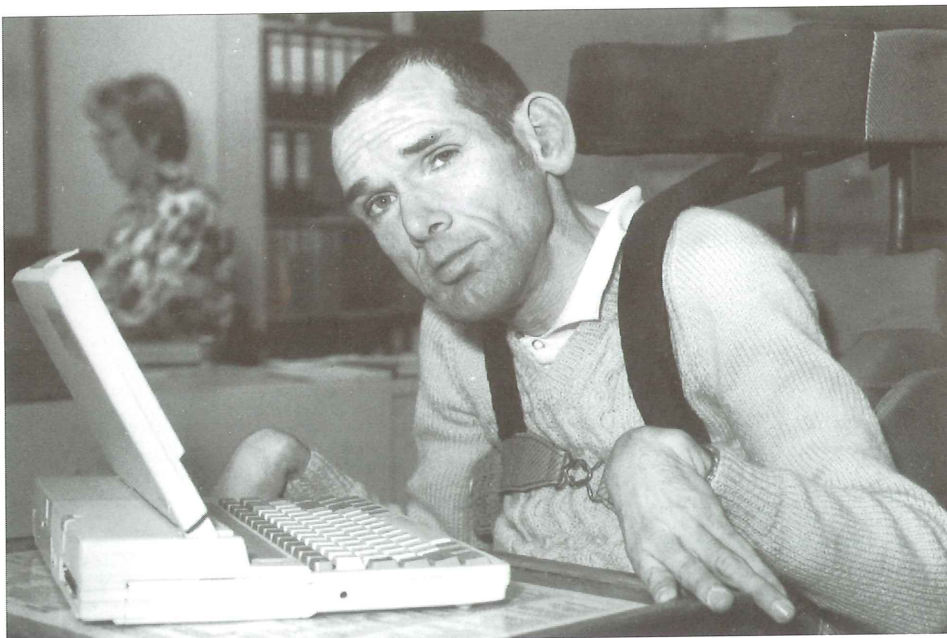
The ceremony, on June 27, commemorated the past by opening a rose garden and sculptural fountain dedicated to Spastic Centres of South Australia's founding families and by the launching of a history book on the organisation: *Perseverance* by Rob Linn.

The Future Directions plan, launched by the Minister of Health and endorsed by the government, has already seen Spastic Centres of South Australia move from a large multi-function organisation to two specialised service agencies—Community Accommodation and Respite Agency, and Community Access Services of SA—and the plan now calls for these agencies to move toward independence. Both agencies are supported by the Spastic Centres of South Australia Foundation.

The launch also recognised the developments at the Woodville Centre, now an administrative base for the new Spastic Centres of South Australia services and the development of new corporate identities.

Finally the ceremony was a personal tribute to executive director, Vic Symons, who with the support of the Board, saw these momentous changes from conception to reality.

The development of Future Directions follows a long-standing Spastic Centres of South Australia tradition of basing its future on listening to the needs of its consumers.



Woodville Spastic Centre - Neville Potter on P.C.

Spastic Centres moves services into the community.

Spastic Centres of South Australia leads the field in moving services for people with severe disabilities out of institutions back into metropolitan and country areas.

"The Community Access Service operated by Spastic Centres of South Australia was the first of its kind in Australia when it began in 1987," said Ms Anne Skipper, president of the organisation. "Before this time, when children with a severe disability had completed their education, there were very few alternatives in terms of day-time activities. The most common option available was to spend the day as one of a group of twenty-five taking stamps off envelopes."

Like all young adults, people with severe disabilities have varying hobbies, abilities and aspirations. The Community Access Service enables them to attend a course, a gym or pool, the theatre, a cafe or restaurant, or simply visit friends.

The changes that have recently occurred in the life of one young man illustrate this. Having spent thirty years of his life confined to the limitations of an institution, Neville Potter won the Sir Charles Bright Scholarship which enables people with disabilities to do further studies. Using an electronic communication device, he is using the scholarship to study communication, psychology, sociology, health and community development. "Just about anything young adults want to do or participate in can be arranged," Ms Skipper said.

Spastic Centres of South Australia also provides accommodation and respite services to children and adults with severe disabilities. With twenty-four-hour support, they live in suburban houses specially adapted for their use. "Living in the community improves self-esteem, independence and the motivation to learn new things," said Ms Skipper.

Two young men, Pandy Tzimboukis and Darryl Newell, have recently moved into a new unit in the western suburbs. Pandy and Daryl had hands-on involvement with the building of their new unit, choosing taps, doors, kitchen fittings and so on so that they meet their specific needs.



Bradley Scott speaks through his friend Phil Copeland at the opening of a cluster housing development in Adelaide.

The respite service offers short-term accommodation to provide a rest, emergency relief or holiday for the children and adults with severe disabilities, their families and other caregivers. Ms Skipper said finding alternatives outside the family home has always been a concern.

With the accommodation, respite and community access centres now being located throughout the metropolitan and rural areas, the institutional base on Woodville Road is reduced to a small head office for Spastic Centres of South Australia, which continues to be at the leading edge of service development for children and adults with severe disabilities.

Cluster housing helps with the "big move"

Learning to live independently from parents or carers is a milestone most young people look forward to. A small group of people with disabilities recently took the opportunity to make the "big move" in a new cluster housing development in Mile End, an inner Adelaide suburb.

Twenty-three-year-old Bradley Scott spoke on behalf of residents at the opening of the site in December last year.

"I believe that sites such as this are very good and have helped me to adjust to the move. We are like a small community within a community. I am able to visit others in the site and have them visit me and, at the same time, if I want time on my own I know that this is also possible."

The site provides homes for six individuals with physical disabilities, all receiving staff support from Spastic Centres of South Australia's Community Accommodation and Respite Agency. The model of service ensures that people are able to live in the community without the costs of support being prohibitive.

Also speaking at the opening, Mrs Nita Curtis, vice president of Spastic Centres of South Australia, reflected on the cost saving: "For example," she said, "an elaborate call system ensures only one person needs to be available for overnight support instead of the previous six people, without any loss in the quality of services. Until now, for people with very high needs, staff costs have meant that institutional care or larger group homes were the only option."

In officially opening the site South Australia's Minister of Housing, the Hon. John Oswald, commended the outstanding commitment of the Manchester Unity Housing Association, the Housing Trust of South Australia and Spastic Centres of South Australia for being responsive to community service needs.

The houses, supplied and renovated by the Housing Trust, are now part of the Manchester Unity housing stock. Manchester Unity also maintains the properties and collects the rent. Although both organisations are well known for their provision of housing for the general community, they have also provided innovative and generous support for housing for people with specialised needs over many years and, despite difficult economic circumstances, both organisations are committed to providing these much needed resources.

Bradley Scott went on to reflect on the move from his family home: "As the big day came closer I was becoming more and more nervous and at one stage considered not going, but knew that I had to at least try. I have now been here seven weeks and am not looking back. All the nerves have gone and I am really settled".

Ray Gabell
Community Liaison Co-ordinator

JOINT FOUNDATION SUPPORT

Joint Foundation is a non-profit administrative and research Secretariat, designed for use by individuals and organisations wishing to contribute money to philanthropic activities.

The Secretariat is an initiative of the Lance Reichstein Foundation, designed to promote progressive philanthropy in Australia through the practice of efficient grantmaking.

SECRETARIAT SERVICES

The Secretariat provides a range of services for the planning and management of grantmaking. Services can be tailored to meet the specific priorities and interests of individuals donors and donor organisations.

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Approaching the Foundations - a useful US model

The purpose of this paper is to demystify the grantmaking process to help interested organisations in approaching foundations in the United States. Although foundation requirements and procedures vary, there are some common elements that are useful to consider when approaching a foundation for funding. Many of the principles may also be useful in developing an approach to foundations in other countries.

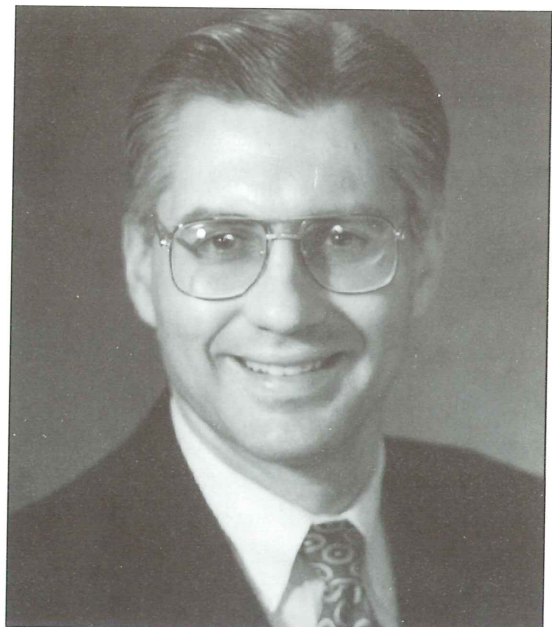
The cost of operating community-based organisations is growing, competition for funding is considerable, and government funding is likely to continue to shrink. Although foundation funding is a small portion of the total financial resources in the social sector, it is one source of new funding for program innovations. Therefore, the competition for foundation funding is very high. The sad truth is that nobody gets grants from foundations simply because they are a good organisation doing good things. In order to get funding, a lot of homework needs to be done. The key information includes what funders are interested in, how to approach them, and how to sell ideas to them.

One of the goals of funding development through grants should be to find a match between the organisation's mission and the mission of the foundation. Once the match between missions is found, the challenge is to build a working relationship with the foundation staff. The first thing to remember is that every foundation is absolutely distinctive. Each one has its own mission and funding priorities. Each one has different rules and different requirements. So the most important thing is to do the homework before approaching anybody. The best place to start is at one of the four Foundation Center Libraries around the country (Cleveland, New York City, San Francisco, and Washington, DC). In addition, there are multiple cooperating libraries in most states, and nearly every public library has a copy of the Foundation Directory (which contains detailed information on almost all foundations). The research should result in a list of foundations that make grants in the service areas and are interested in the type of project and audience of interest;

and their requirements (i.e. application forms, deadlines, supporting materials needed, address, and phone number).

This information sets the stage for a contact with the foundations. Call or write to a number of foundations and request additional information to help get to know them better and help identify if there is a close match between the program and their missions. Documents that will be useful in this decision-making process include annual reports, informational brochures, and application packets.

Once these materials have been studied and a good match has been identified, it is time to begin to help the foundation agree with that decision. The typical foundation receives many more proposals than it can fund each year. The competition is fierce. The challenge, then, becomes making a proposal stand out from the large number of proposals received by foundations. This is very difficult to do in a proposal addressed "To Whom It May Concern". So the best thing to do is to try to make a direct contact with a program staff person at a foundation of interest. This will reduce the number in the competitive review pool from thousands to hundreds. The job is to identify the most



Joel J. Orosz

appropriate person to contact. A very simple approach to finding the right person is to ask the secretary who answers your phone call. Very simply state the focus of the project and ask for the name of a program staff person (program director) who works with similar projects. This will usually result in the name of a key person who is responsible for project development in the appropriate area. Then send the proposal directly to this person.

Actually, that is bad advice. Do not - repeat, do not - send a full proposal to start with. Send a short preproposal instead. The key is to be as brief as possible. Program directors read hundreds of proposals every year. Some of them are 100 pages long. If a one- or two-page preproposal is sent, it already has a better chance of getting a thorough review. The brief and concise document can help the program director identify if the program idea matches the foundation's mission. If there is agreement on the match, then a full proposal can be developed.

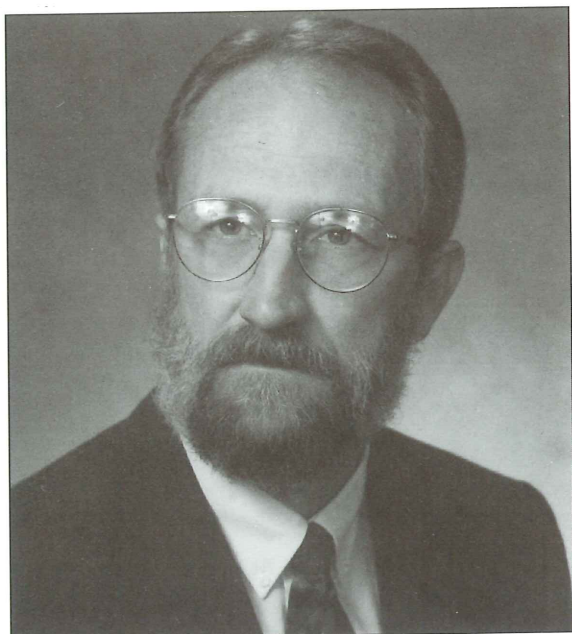
Any number of approaches to a preproposal will surely work just fine with most foundations, just as long as it contains the basic information needed to understand the program idea. The document should not contain a long statement of the problem the proposed project is trying to solve. Program directors have read about the problems hundreds of times. They do not need to hear them again. Many of them were hired because of their background in the assigned topic area. Instead, start the preproposal with a

one-sentence statement of the problem, such as "25 per cent of the high school students in our community drop out every year, and this number is far too high." Now, comes the important part. What will the proposed project do about it? Present two or three solid paragraphs on how the project plans to solve this problem. Remember, the program director knows nothing about the project and will need to know exactly how it plans to pull it off. It always helps to share a timeline for implementing the project here.

Now comes the part of the preproposal that almost no one thinks to write: the continuation plan. Once the project has started, how will it be kept going? Remember that foundations like to start new things, but they never like to fund anything 100 per cent, and they never like to fund anything forever. So it is important to tell, in one or two paragraphs, how much of the program's own money will be invested in the project, and how the funds will be raised from other sources to keep it going after foundation funding ends. If there are a couple of paragraphs on this subject, the preproposal will be ahead of 90 per cent of the proposals received by foundations. Most organisations are so focused on getting the money to get started, that they do not even think about how they are going to get the money to keep it going.

The next thing the preproposal needs to have is a paragraph or two on how the program intends to evaluate the results of the project. It never hurts to ask a foundation for some money to hire, for example, an expert on the topic area from another location to come in and evaluate the project. This will help to know how successful the project has been. Again, the majority of people who write proposals never think of this, and it will make a proposal stand out if it is included from the start.

The last part of the preproposal is a simple budget. This budget should have five or six line items, and it should tell the foundation exactly how the program intends to spend the money being requested. There will probably be a line item for personnel, another line item for supplies and materials, one for transportation, another one for meetings, and so on. This will give the program director a general idea of planned expenses and allow a subsequent request for more details if needed.



Robert F. Long

A very brief preproposal can only outline the bare bones of an idea. But that is all a program director needs to get excited about the plan, and it will be up to this person to ask for the details necessary to put flesh on the skeleton. The fact of the matter is that if a preproposal can get noticed among the large number that come in every year, about three-quarters of the battle is already won.

Once a program director starts working with a proposed project, the chances of getting the grant are much better, because now it has a guide to take it through the rest of the process. That process will usually include a request for a full proposal and a site visit by the program director. But, since the program director will be helping it through these steps, there is no need to go into those details here. Instead, use the following checklist than can be used to judge if a preproposal will be effective. These are the kinds of things that are often looked for in every proposal that is received by foundations. If they are there, foundation staff are more likely to support the proposal than if they are not:

CHECKLIST

This is a new approach. - Most foundations like to fund new and exciting things, not more of the same.

The applicant has done their homework about the foundation. If an applicant has done their homework, they are simply more impressive than someone who has just thrown together a proposal.

The applicant is determined to do the project no matter what. Foundations like to fund people who are committed to what they are doing, not people who will only do it if some foundation gives them a lot of money to do it.

The applicants have the know-how to do it. Program staff do not have to be world-famous experts in this area, but they do need to have some experience.

This project is being done to improve the lives of people, not to make the organisation bigger and richer. Funders care about people more than they care about organisations.

*The applicants are doing it **with** the people they are trying to help, not **to** them.* If they are trying to help kids, have they involved them in putting together the preproposal? Foundations think it is important that the people who will be helped have some say in the matter.

The applicants are investing their own money in the project. This tells foundations that programs are committed to the project, and that it is important to them. It also helps to convince foundations that programs will take it over after their funding ends.

The applicants have a comprehensive approach to the problem. No one can solve a complicated problem with a simple solution, and foundations are looking for people whose answer is at least as sophisticated as the problem they are trying to solve.

The applicants are willing to work collaboratively with anyone who can help. Foundations do not want to fund eighteen different programs to help dropouts in one high school. They like to see programs working together to improve the lives of people.

The applicants are willing to have impartial evaluators assess their work. This will help both the applicants and the foundations learn to do a better job.

The applicants will continue the program after foundation funding ceases. Foundations like to help things get started that are so valuable to people that they will continue to operate even after foundation funding ends. There is hardly much point in starting a project that is going to die two or three years later, after foundation funding comes to an end.

So that is how to approach a foundation. Good luck!

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CIVICUS conference, Mexico City

10 -13 January, 1995

This conference was the first World Assembly of CIVICUS, a global alliance for citizen participation. Over 50 countries and 300 participants were present. The program was opened by the President of the United States of Mexico.

The conference has been the result of over three years planning which has included a series of reports by regional blocs, accompanied by regional meetings in various parts of the world. The aim of the conference was not to constitute CIVICUS, but to strengthen the understanding of what it means and to determine forward strategies.

Inevitably, in such a gathering of community activists, there was a good deal of discussion about the participatory nature of the organisation, the process of decision-making and the powers of the Board. It was made clear at the outset by the organisers that the Board composition would be subject to election at the next world meeting in two years' time when one third of the board members would stand down.

It became clearer as the conference progressed that the aim of CIVICUS is to provide support and resources to activists in the third sector in the form of a peer-to-peer network. Part of the aim of the conference was to determine ways in which that might take place, particularly with reference to the regional groupings.

A number of issues emerged over the first two days: whether CIVICUS would act as a representative body and, if so, how policy might be determined; whether CIVICUS was open to any community group, for example the Klu Klux Klan and, if not, how the criteria for selection might be determined; what ways in which communication and information could be best achieved amongst members.

Whilst CIVICUS has been established as a membership organisation, it might best be described as a support system for individuals who are trying to make a difference

within their respective societies. It is clear that the conceptual basis for this development has been a perceived failure on the part of government or the market sectors to best address the needs of building democratic, pluralistic and human societies.

The formation of CIVICUS seems to have arisen from the initiative of a number of foundations, organised through the auspice of the Council on Foundations and the Independent Sector. In some ways, it provides a new auspice for a world congress on philanthropy to replace the two previous such conferences which were run by a private company and made a substantial loss.

One of the emerging roles for such a global organisation is to provide a degree of external clout for local and regional activity. For instance, in opening the Congress, the Mexican President took the opportunity to make two important policy statements of support for the sector which local agencies had been promoting, with little success, for some time.

Within an Australian context, there are a number of reasons why it might be important to support the development of such an organisation. It provides an important vehicle for collaboration with our Asian and Pacific neighbours; it offers an opportunity to rally the third sector within Australia around the generic issue of citizen participation and the community development role of civil society rather than the specific concerns of such agencies as ACROD, ACOSS, AAP or the like; it provides a new vehicle for a voice to government on issues of concern related to the sector and the necessary infrastructure that may be required to support it.

The direct relevance to the Association of Philanthropy arises from the Association's own objective, namely to promote more effective private and corporate giving. The Association could support the role of those individuals or

organisations which exist to make a positive difference to society. The role of CIVICUS is to underscore and provide support to the existence of citizen action and the potential of the individual, alone or in association, to make a difference.

One of the major reasons for attendance at the conference was the opportunity to determine a topic and potential speakers for the proposed October follow-up conference to the 1994 conference around the "nuts and bolts" issues of charity.

In discussions with the president of the Australian organisation which represents philanthropy in the form of private volunteer giving, it was seen as appropriate that our two organisations, representing giving either in cash or in kind, could work together to convene a conference which would provide an opportunity for a series of key citizens who make a difference in Australian society to articulate their positions.

The theme of the conference would revolve around the development of society through the role of the third sector or through agencies which can be best described as civil society organisations. It really does not matter if the agency in question meets the needs of individuals with intellectual disability and their families, the homeless, the sick or the needy, the focus of the conference would be on the process of citizen participation and its developmental role in the formation of Australian society.

The aim of such a conference might be to provide a forum to profile citizen action in a number of different ways. Such people might include Michael Kirby, Janet Holmes a Court or a private philanthropist such as a John Gandel, Richard Pratt or Victor Smorgon, and a hero from within the Aboriginal community.

The brief given to each speaker would be to highlight how citizen action can make a difference and the importance it might play in forming society and its values.

By Max Dumais
Executive Officer
Association of Philanthropy

COMPUTERISED TRUST ADMINISTRATION PACKAGE

The Australian Association of Philanthropy Inc., with the financial assistance of Myer, Schutt, Sunshine and McKay trusts, has commissioned the development of a computer package based on previous versions developed for Reichstein, Stegley and the Women's Trust to assist in the day-to-day management of trust affairs.

The program is presented in a user-friendly windows environment for IBM compatible machines, and will be also available in Apple.

The program assists trusts from the receipt of applications through trustee consideration, to financial decision and ongoing monitoring.

A database is developed on which the history, trends and patterns of giving for the trust can be determined. The aim is to ensure that the language employed across the sector becomes common enough to provide accurate and realistic information on the effects of trust activity in Australia.

The cost of the package is \$2,500, which includes three-day installation, on-site tuition time and ongoing telephone advice from Karen Bingham and Associates, who have developed the program.

For further information, contact:

Max Dumais
Association of Philanthropy
(03) 614 1491

Somebody's Daughter Theatre: A case study in collaborative funding

When Maud Clark and her team decided to go public with Somebody's Daughter Theatre in 1991, its future depended on its ability to attract funding.

However viable a project may seem, this support can never be guaranteed and theatre has the added disadvantage of having a long lead time from the initiation of an idea to its production on stage. Work on *Call My Name*, Somebody's Daughter's second production, began in January 1994, ten months before the season opened at the Malthouse.

This means, says administrator Carey Lai, that work has to commence before all the required funds have been obtained. In a recent report she writes:

"We started the project *Call My Name* with limited funding in the belief that we would gain sufficient for the whole year, by mid-year. We did get what we required but it wasn't until just prior to opening... I cannot see another way of achieving exciting outcomes of such visions without risks, but it does take its toll."

In fact the "ideal" budget for *Call My Name* was \$155,000, only \$118,000 of which was forthcoming. This included \$10,000 each from the Reichstein and Myer Foundations, \$5000 from the Ross Trust and \$5000 from the Sunshine Foundation. The largest single sum - of \$45,000 - came from Dame Elisabeth Murdoch, who was one of the project's earliest and staunchest supporters.

Although Somebody's Daughter has had support from other sources including the Australia Council, Vic Health and the Office of Corrections, 75-80 per cent of its funds has come from philanthropic trusts.

Competition for these funds is keen. The Myer Foundation receives up to 1000 applications a year and makes grants to about 200. ANZ Trustees receives applications from about 1200 projects and funds approximately 5 per cent of them. Of the 300 odd applications made to it each year, the

Reichstein Foundation funds 40 to 50. Most trusts will not give recurrent funding, only grants for specific projects.

Few trusts and foundations have published guidelines and only a relatively small number include community arts projects within their charters. Most trusts meet between two and four times a year and applications commonly take from three to six months to be decided, although funds once granted may come through quickly.

In its favour in grants seeking, Somebody's Daughter Theatre had its uniqueness and public profile as well as the proven record of its principals, who had been working in Fairlea for more than ten years. The early sponsorship of Arts Access and Carey Lai's experience of grants seeking as its Senior Projects Officer, were also valuable assets.

After becoming an incorporated body in 1991, Somebody's Daughter began to send out applications and had almost immediate success. Following one rejection by the Stegley Foundation, which has since funded an associated project - a book of writings by Fairlea women compiled by Helen Barnacle, the group received its first grant of \$7000 from the Sidney Myer Fund in April 1992.

This foundation has a record of funding community arts programs. Its Executive Officer, Michael Liffman, was impressed by the uniqueness of Somebody's Daughter - nothing else like it had been done in Australia - and by the ability of the individuals involved to 'deliver on the proposal'.

Since then the Myer Foundation has made Somebody's Daughter a grant of \$10,000, in December 1993.

Valuable seed funding also came from the Victorian Women's Trust, which gave \$11,000 in 1992 to finance pre-production workshops for *Tell her that I love her...* Jenny Florence, then the trust's Executive Director, passed the word around to other philanthropic trusts that Somebody's Daughter was a project worthy of support.

Elizabeth Cham of ANZ Trustees has been another of the project's chief supporters. ANZ Trustees represents about 250 individual trusts and acts as a secretariat, screening applications and making recommendations to the trustees.

Elizabeth was initially impressed by the "demonstrated long term commitment" of Maud Clark and her colleagues. After meeting them she recommended their application strongly, and grants totalling \$33,000 - drawn from trusts administered by ANZ Trustees in collaboration with the William Buckland Foundation - were made in September and December 1992.

Elizabeth believes that theatre is the best form of welfare, that people are their own best advocates, and that theatre can be a significant agent for change in people's lives. She has since seen both Somebody's Daughter Theatre's productions and describes them as "powerful, gut-wrenching stuff".

As well as recommending their application, Elizabeth hosted a lunch, late in 1992, where members of Somebody's Daughter met representatives of other potential funding sources including Vic Health and the Australia Council.

The Reichstein Foundation has also supported Somebody's Daughter since its early days. In 1991 the Foundation gave \$13,000 towards the drama group's work within Fairlea, through the Victorian Women's Prison Council. Aware of the importance of the work in building the women's self-esteem and conscious that there was little rehabilitative support for them once they left Fairlea, the Foundation welcomed the opportunity to assist Somebody's Daughter Theatre in going public. It granted the project \$15,000 in June 1993, and a further \$10,000 last year, towards the production of *Call My Name*.

Executive Officer of the Reichstein Foundation, Genevieve Timmons, describes the two Malthouse productions as "ground breaking in their impact" and an "ideal example of the sort of community arts project worth funding". Timmons says, "While the chief value of many such projects is to the participants, Somebody's Daughter has the added value of producing marvellous, high standard theatrical productions".

Besides the \$45,000 grant for *Call My Name*, Dame Elisabeth Murdoch also gave substantial support to the first production, *Tell Her That I Love Her...* Over the three years of its existence, her contribution to Somebody's Daughter Theatre and to its work in Fairlea has totalled some \$91,000.

Dame Elisabeth, who saw *Tell Her That I Love Her...* and later met the cast members and producers, speaks warmly of the project's value and the difference she's seen it make in the lives of the participants. "I thought from the first it was such a needed activity. I was greatly moved by the production I saw and the people I met, and have great faith in its value to us as well as to the individuals involved."

By most measures, Somebody's Daughter Theatre's search for funding has been remarkably successful. It has also been demanding work for a small organisation with limited administration resources. Carey Lai believes measures - such as sending out application forms on computer disc - could be taken to "limit the bureaucracy" of grant application. Since the trusts all have different application procedures, different forms and different deadlines, it would still be costly in time, energy and resources.

Robin Hunt, Chairman of the Sunshine Foundation and a council member of the Australian Association of Philanthropy (AAP), believes an organised program of cooperative or collaborative funding could greatly reduce the pressure on grant seekers and give them a better chance to reach adequate funding levels.

Robin suggests "If a program requires \$60,000 to work, it's not much use if a trust grants it \$35,000. Collaboration between trusts could ensure that the needs of a likely project were adequately met."

Robin first became aware of Somebody's Daughter when he was invited to a sample program with other philanthropists in 1993. After the performance, he "felt they were old friends" and encouraged them to apply to the Foundation when another project was in the pipeline. He thought their specifically targeted approach was more likely to succeed than other ex-prisoner projects Sunshine had supported in the past. It has since made Somebody's Daughter a grant of \$5000.

Some trusts, including the Myer Foundation, the Reichstein Foundation and ANZ Trustees, are already practising cooperative funding. ANZ Trustees has collaborated on this basis with the Reichstein, Stegley and Myer Foundations, and is currently funding a project jointly with Perpetual Trustees.

In March this year, a \$1000 grant from Ian & Nelleke Clark, who have a Fund with the Victorian Community Foundation, was used by Somebody's Daughter as a challenge grant and led to four other foundations matching the Clarks' contribution. The money was urgently needed to allow work on the current production to continue while awaiting funding from the Australia Council (due later in the year).

There is no formal structure in place to facilitate collaborative funding, however. Robin Hunt believes a more systematic approach could be adopted which, while safeguarding the independence of individual trusts, would give applicants a better chance of carrying their projects through successfully.

Genevieve Timmons thinks a useful first step would be to develop common paperwork and common deadlines for grant applications, perhaps coordinated by the Australian Association of Philanthropy. Plans are now afoot for interested trusts to meet later this year to work through some of these possibilities.

Robin Hunt further proposes "A project like Somebody's Daughter Theatre, which has received grants from multiple trusts yet has still struggled to make its production budgets, would surely benefit from such an approach."

And what does Carey Lai, a veteran grant seeker, think of the idea of a more formal process for collaborative funding? "I think it's brilliant. In terms of time and effort saved, it would be wonderful."

She warns, though, that it could have disadvantages as well as advantages. "Applying to, say, five or six trusts, you have five or six chances. Applying to a central body, only one dissenting voice - from a trust representative who has already given to the project, for example - could sabotage an application."

By Carol Cohn

CALENDAR 1995

as at 5 April, 1995

Executive Meetings: Tuesdays at 9.30 am

<i>April 20</i>	<i>June 27</i>
<i>August 29</i>	<i>October 31</i>

Council Meetings: Tuesdays at 9.30 am

<i>May 30</i>	<i>July 25</i>
<i>Sept 26</i>	<i>November 28</i>

Members' Luncheons: Fridays from 12.30 till 2.00pm *Melbourne:*

<i>April 7</i>	<i>June 9</i>
<i>September 8</i>	<i>November 10</i>

Sydney:

<i>May 12</i>	<i>June 22</i>
<i>September 26</i>	

Workshops - Grantseekers

<i>September 21</i>	<i>Melbourne</i>	<i>basic</i>
<i>June 1</i>	<i>Melbourne</i>	<i>advanced</i>
<i>November 2</i>	<i>Melbourne</i>	<i>advanced</i>

<i>April 24</i>	<i>Rural Victoria</i>
<i>August 25</i>	<i>Rural Victoria</i>

<i>June 22</i>	<i>New South Wales</i>
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<i>May 1</i>	<i>Western Australia</i>
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<i>October 19</i>	<i>Queensland</i>
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Workshops - Trustees

<i>May 11</i>	<i>Melbourne</i>
<i>July 20</i>	<i>Melbourne</i>
<i>Sept 27</i>	<i>Sydney</i>

Major Conference

Now postponed until 1996

Annual Dinner

<i>October 26</i>

Council Planning Day

<i>December 12</i>

CIVICUS:

A rush to judgement in Mexico City

Conceived in very broad terms in early 1991 by the Council of Foundations and the Independent Sector, the two largest associations of grantmakers and non-government organisations in the US, and the European Centre (Brussels), CIVICUS held its first World Assembly in Mexico City on January 10, 1995. Events leading up to this inauguration were extensive. A major deliberative group was formed and extensive discussions involving representatives from around the world were held throughout 1992. The organisation, CIVICUS, was formally created in May 1993 and, over the next two years, a board was formed, CIVICUS staff were hired, reports on the voluntary sector were undertaken in several regions, and the work preliminary to the Mexico meeting was completed.

The stated mission of CIVICUS: World Alliance for Citizen Participation, is:

- to encourage regional and national associations whose purposes are to strengthen local efforts for involvement and impact on citizens, and
- to help establish an international climate that will provide moral and political support for those trying to develop pluralism and empowerment in their countries and communities.

The primary purpose of having a stated mission was to engage participants in the Mexico City Conference in dialogue and debate over what in effect CIVICUS needs to be. How, practically, CIVICUS is to be organised to deliver substantive support and services, given whatever appeared to be the majority view of conferees as to its feasible purpose, was, concomitantly, at issue.

And engage they did. For the next three days, over 350 participants from 55 countries debated virtually every aspect of the CIVICUS initiative, aided by plenary speakers and discussion leaders in small groups. The Mexico City meeting was CIVICUS' first major public "sounding", held to determine the reaction, on as internationally representative basis as possible, to the course charted and to be pursued

in the future by the board and membership. The board expressed its intention to take all views presented into account as it considers possible changes in or modifications to present thinking on the role and mission of CIVICUS.

The scope of the issues that emerged in Mexico is at first sight daunting. It would be impossible to catalogue fully the range and diversity of comment, and the intensity with which this comment was often delivered. In this respect, the conference achieved a degree of individual involvement one seldom sees at such convenings.

While daunting, the richness of comment is also encouraging for it demonstrates the growing vitality of individual and grassroots organisational action that is taking place worldwide. For the majority of conference participants, perhaps the issue is "why do we need a global body like CIVICUS when in fact at the individual, community and regional level, we are fully engaged and in a manner with which we are comfortable?" Put another way, participant comments hinted at a more serious concern: "is CIVICUS just one more (industrial nation or "North") trojan horse the purpose of which is to suborn the incipient (developing nation or "South") effort to define its own independence and itself determine the means by which it is to be achieved?"

In 1993, The Hitachi Foundation, funded by Hitachi Ltd, made a \$250,000 challenge grant to CIVICUS to establish the Participation Fund. This fund was designed to assist those with limited financial resources to participate in Assemblies and the Board.

To succeed, CIVICUS will have to address this issue in pursuing the global promotional role which it proposes to play in developing independent sector activity into the next century. Even more critical is the need for CIVICUS to find ways in which to change the suspicion and consequent behaviour that permeates the debate on anything within the North-South context.

Perhaps no where was this more clear than on the issue of private-sector involvement and the CIVICUS initiative. Among the many thoughtful comments made by one of the first speakers, David Rockefeller, was that, "without an active, growing and dynamic private sector, there can be no independent third sector able and vital and having the capacity to take its place alongside the government and private sectors". That is, the funds will not be there to support the independent sector.

There were few corporate representatives attending the Mexico conference, and the ambivalence toward corporate participation was as evident among CIVICUS board members as it was among conference participants in general. Comments from the floor repeatedly stressed the suspicion with which the private sector is viewed, even to the extent of commenting, as one participant from Mexico did, on the origin "of tainted money (corporate sector support) for CIVICUS' activities" and to question the "possible insidious purposes for which this money is being provided". Another participant, from Uganda, wondered out aloud if "in a few years, a conference like this might be discussing the former capitalist nations", a clear reference to the sensitivity with which rampant privatisation appeared to be embraced by several conference speakers.

Such comments clearly suggest that the decade-long debate over the private sector's role, both in the newly independent states (NIS) and in the developing regions of the world, is no less heated than it has been - the "end of the Cold War" notwithstanding. Arguably, the end of the Cold War has probably contributed more to the exacerbation of this issue than to affirming of the private sector's necessary involvement in all manner of global issues.

Another facet of the North-South dichotomy in evidence at the Mexico City meeting was no doubt inadvertently created by the manner in which the organisers viewed the necessary geographic mix of conference participation. Given the proximity of the United States to the conference venue, Mexico City, it was thought that participation by US organisations had to be curbed lest it overwhelm the more limited participation coming from other regions. However, what was needed was a broad representation of non-government organisations from the US that could interact and network in ways that grantmaking organisations cannot. The absence of non-government organisation

representation, not only from the US but also Canada, Japan and Western Europe, gave the impression that the 'North' doesn't need the same kind of CIVICUS-led assistance as the 'South'. This in turn created a sense of one-way dialogue.

That these contentious issues - and others - surfaced is all to the good. It means that CIVICUS was successful in creating an open atmosphere within which people felt free to state their opinions. It also means that, to be successful, CIVICUS is going to have to create a whole new chemistry for independent-sector dialogue and, ultimately, altered cross-cultural behaviour leading to an acceptance of a common mission and purpose for this dialogue.

In closing, I wish to posit some personal observations that mostly relate to issues of 'balance', and the need to get beyond the present level of North-South dialogue on future independent-sector growth, and the role that CIVICUS can play:

- Perhaps it is the United States and other industrial nations who need to play "catch-up" with the rest of the world. For them CIVICUS is a necessary forum to begin the process of moderating and modernising their (the North's) behaviour and attitudes in a rapidly changing world. It is the future form and direction of the industrial powers global participation that is, after all, at issue.

- How should the industrial powers come, or be brought to, the kind of dialogue that CIVICUS wishes to conduct and to be of service to? One recognises that many NGOs in the United States and in other industrial nations (Japan, for example) labor under the same hardships as are found in the emerging nations. What is to be their linkage to CIVICUS? Can they participate in CIVICUS as equals?

- And how about the private sector? It too must be brought to the table, for the global capital resources and human resource mobilisation capacity which it commands only seem to grow and at an ever-increasing pace. To leave them out - or conversely, to not invite them to participate in and provide support for efforts such as CIVICUS - is simply to "let them off the hook", to encourage irresponsible rather than responsible behaviour.

One thing is equally apparent in all of this. If CIVICUS just manages to become one more venue for discussion of all that divides the globe, however erudite and meaningful such a process might be, then CIVICUS will have failed to do the one useful thing that it might: to create a platform

for defining the hope and prospect of an independent sector that finds solutions for profound challenges facing communities.

Delwin A. Roy, President and CEO

The Hitachi Foundation, Washington DC, USA

NOTICEBOARD

WELCOME TO OUR NEW MEMBERS...

The Association is pleased to welcome to membership:

Deakin University Foundation
Foundation for Development Cooperation Ltd
Garnett Passe & Rodney Williams Memorial
Foundation
Invergowrie Foundation
McDonalds Australia Ltd
Queens Trust
Westpac Banking Corporation

INVITATION:

Members wishing to post any notices on this noticeboard in the future, please contact the AAP office on
Tel: 614 1491 or Fax: 621 1492

PLEASE NOTE...

Council has decided to postpone the major conference scheduled for October until 1996. The Annual Dinner remains October 26th.

The four bi-monthly luncheons for 1995 are planned to explore the issue of collaborative funding. The dates are April 7th, June 9th, September 8th and November 22nd.

PHILANTHROPY CALENDAR FOR 1995...

For all the important dates for 1995 please refer to page 25.

COUNCIL FOR 1995...

Officers:

Jill Reichstein	President
Ben Bodna	Vice-President
Adolph Hanich	Treasurer
Fleur Spitzer	Secretary
Martin Carlson	(ex-officio)
Max Dumais	Executive Officer

Members:

Don Aitken
Robin Hunt
Anne Riches
John Sullivan

THANKYOU...

To the Melbourne University Alumni and Development Unit for assisting with the AGM for 1995 and enabling the Members to meet in the Council Chambers and later for lunch at University House.

A special thank you to Tracey Gary for speaking at the AGM and providing Association members with some challenging perspectives on progressive philanthropy.

To J.B Were and Son for their sponsorship of Philanthropy 23 and providing members with information on how to best manage shares in an investment portfolio

To Westpac Banking Corporation for providing a venue for and underwriting the Sydney Grantseekers' Workshop in February 1995.

The Australian Association of Philanthropy Inc

The Mission

The Australian Association of Philanthropy Inc aims to promote more effective private and corporate giving in Australia. It was established to provide a strong, professional organisation to represent the interests of philanthropy. In particular, to represent large and small trusts and foundations from both the private and corporate sectors, as well as individual philanthropists.

The Membership

Andrews Foundation
Ansell Ophthalmology Foundation
ANZ Executors & Trustee Co. Ltd.
Australian Bicentennial Multicultural Foundation
Australian Youth Foundation
Body Shop
Brash Foundation
C.R.A. Limited
Clean Up Australia Foundation
Coca - Cola Amatil
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Estate of the late George Adams
Everald Compton Charitable Trust
Felton Bequest
Flora & Frank Leith Charitable Trust
Foundation for Development
Freehill, Hollingdale & Page
G.M & E.J Jones Foundation
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