



# philanthropy

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SPRING  
1997

## ***Special Feature:***

Community Development

- Grants on the Internet
- Lawyers and Foundations

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Front Cover: Latje Latje Aboriginal Dancers, Mildura, Victoria who participated in the  
COMMUNITY DEVELOPMENT SOCIETY CONFERENCE  
Hosted by the Westgate Federation Inc. 1996 (see p.16)

Joint Editors: Elizabeth Cham & Jane Sandilands

The articles in Philanthropy do not necessarily reflect the view of members or of  
Philanthropy Australia.

**Philanthropy**

# Report from Executive Director

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**I**t seems to me that all the signs point to Philanthropy Australia being one of the significant one hundred organisations in Australia in the coming years. This is possibly because of the huge structural shifts in funding, which are not exclusive to Australia.

It is also because society generally is asking more questions and putting more responsibilities onto all sectors, including the not-for-profit sector. And the lines are no longer so neatly drawn. Business does not now think of itself as apart from the rest of society and we are all conscious, to a greater or lesser degree, of being part of the whole. At the Association, we are receiving more calls for assistance, more enquiries about what we do, more philosophical questions and certainly more media attention than at any time in the last eighteen months. We welcome them and aim to contribute in every way we can. Above all, we see our goal to see the growth of philanthropy in Australia as being absolutely crucial and requiring structural and policy changes within and outside government.

I believe it is imperative that Philanthropy Australia grows as a national organisation, avoiding fragmentation into individual state or regional offices. To facilitate this aim, students of the Melbourne Business School made Philanthropy Australia the subject of a research study. Their report was presented to a special meeting of Council at the end of August. Among their recommendations were that we should focus on developing further our core services of networking, lobbying to Government,

education and training and to be a greater source of information about the Australian philanthropic community. Another recommendation saw the need for the Association to be perceived more as a national body, rather than simply Melbourne-centred. This is, of course, something we recognise ourselves and Ms Donna Greaves has been working as the Sydney representative of the Association for some months, speaking to corporations and organisations about Philanthropy Australia and what it offers.

A further recommendation concerned the Association's advocacy role and its possible increase. This is an area in which we are already working and many members may know of our recent work concerning trustee companies who had made a submission to the Victorian and New South Wales governments seeking an increase of fees for their administration of charitable trusts. The Association is currently negotiating with the Trustee Corporation Association, developing with them a code of practice to be co-signed by members of the Trustee Corporation Association and Philanthropy Australia. Copies of the draft code are available from the Association office.

The Association was recently invited to Canberra to meet Mr John Perrin, Senior Advisor Social Policy to the Prime Minister and was delighted by the response and interest shown. Delegation members included representatives from the Sidney Myer Fund, the William Buckland Foundation and ANZ Trustees. We received a good hearing and believe this

meeting will be the forerunner of others to explore ways in which the growth of philanthropy can be encouraged at government level in Australia.

Other achievements this year have been the establishment and staffing of our Resource Centre. The Resource Centre is supported by the Australia Foundation for Culture & the Humanities, and the Federal Department of Communication and the Arts. Another milestone has been the publication of *The Australian Guide to Scholarships and Awards*.

Members will be aware of our increasing international profile, resulting in the visit of Mr Peter Goldmark, President of The Rockefeller Foundation and guest speaker at the Trustees' Dinner in October. Further recognition comes with the visit by Mr Skip Rhodes, Chairman of the Council on Foundations and President of The Chevron Foundation. Mr Rhodes will be our guest at a forum on corporate philanthropy in both Melbourne and Sydney in November.

Elizabeth Cham, Executive Director

**Philanthropy Australia President, Mr Ben Bodna, is overseas. His column will reappear in the next issue of Philanthropy.**

# News & Views

## New Members

We are delighted to welcome two new members: the Percy Baxter Perpetual Charitable Trust and the Sylvia and Charles Viertel Charitable Foundation. Both new members fund projects Australia-wide and the Association extends a warm welcome.

## Philanthropy Australia: Resource Centre operating

Rachael Bahl has been appointed as Resource Centre Librarian. Rachael works three days a week administering Philanthropy Australia's growing Resource Centre. Experienced in all areas of library work, Rachael's key interests include electronic information sources and the Internet.

## New Appointment

Dennis Tracey has been appointed CEO of the Melbourne Community Foundation. He is also CEO of the Family Business Council, a Melbourne-based organisation offering help and advice to families who own and run businesses. His previous posts include being Executive Director of the Constitutional Centenary Foundation, several years as a performing musician and, for two unforgettable summers, captain of a touring barge on the River Seine in France.

Melbourne Community Foundation,  
Level 7, 350 Collins Street, Melbourne, 3000.  
Tel: (03) 9760 4408  
Fax: (03) 9760 6577

## New Admin/Research Assistant

Esther Lethlean is the new Office Manager and Research Assistant at Philanthropy Australia. She is currently completing a post graduate Diploma in Public Policy at the University of Melbourne. Outside her work and study, she is a volunteer with Very Special Kids and a keen swimmer.

## Women's Business Incubator

The Victorian Women's Trust has recently been funded by the Commonwealth Government to establish a Business Incubator for women interested in developing and sustaining viable small businesses. To be located in the City of Yarra, it will house up to 35 tenants, feature a common reception area, different sized offices and a deliberate mix of businesses to foster trade relations on site.

More details from the  
Victorian Women's Trust on  
Tel: (03) 9642 0422

## And from Sydney

Donna Greaves runs Sydney and Brisbane workshops and represents Philanthropy Australia to groups and corporations to our sister cities. Introduced as a lunchtime speaker recently, it was announced she represented 'Anthropology Australia'. At least, one philanthropist remarked "it's a change from philately!"

## Call for Projects: Christmas issue of Philanthropy

The next issue of **Philanthropy** will feature a 'Bumper Crop': stories about projects funded by member trusts and foundations throughout 1997. We are seeking the innovative, unusual and interesting. While we will be contacting individual trusts and foundations direct, if there is a project you would like highlighted in the next issue,

please fax the Philanthropy Australia office on  
Fax: (03) 9654 8298  
Email: pa@philanthropy.org.au  
And of course, photos are always appreciated.

**Philanthropy**

## Giving Trends

From *Giving Trends in Australia*:  
Copyright 1996 *Giving Trends*,  
O'Keefe and Partners  
**Freecall: 1800 240 127**

- While religious organisations continue to generate the highest income by sector, social welfare, international aid and disability-related organisations attract significantly more donors than religious groups
- More than three-quarters of women aged 55 and over make a charitable gift annually.
- Most Australians prefer to give in response to personal, face-to-face solicitations such as door to door appeals. Unsolicited telephone calls are the most unpopular form of solicitation for charitable giving.
- Based on demographic data, giving patterns vary significantly throughout the nation. 98% of all families in rural Western Australia donate to at least one charity each year while only 70% of Sydney's urban population are contributors to a not-for-profit organisation.

## Focus on Volunteers

A new 32-page magazine, **Community Link**, has a national focus on volunteers, communities and not-for-profit groups. A quarterly colour publication funded by the National Australia Bank, it profiles groups doing interesting things across the country – often able to be adapted by other groups.

**CommunityLink** is free and copies are available by ringing  
**Freecall 1800 807 121.**

## Spread the Word

By now most members will know that the *Guide to Scholarships and Awards in Australia* has been published. The latest

publication from Philanthropy Australia, it gives details on more than 200 scholarships available mostly from trusts and foundations. The Guide also includes a summary of taxation rulings on scholarships and awards and their relevance to those who receive awards of this kind.

Cost of the Guide is \$45 including postage from Philanthropy Australia.

international foundations, private grant makers and charities that make grants.

<http://www.tgi.com/sampmenu.htm>

- Philanthropy Australia subscribes to *The Chronicle of Philanthropy*, which is held in the Association's Resource Centre.

\* The Chronicle is also on the Internet:  
<http://philanthropy.com>

## Resources on the Internet

*The Chronicle of Philanthropy*\* (May 1, 1997) lists Information Resources on the Internet for Grant Seekers.

Among those listed under General Information are:

### Council on Foundations

Linked to more than 150 sites maintained by council foundation members, as well as to associations of grant makers and to philanthropy research centres worldwide.

<http://www.cof.org>

### Foundation Center

Provides links to home pages of nearly 100 private foundations, 54 corporate grant makers, 23 community foundations and 18 grantmaking charities. Besides providing a link to each grantmaker's site, the Foundation Center provides descriptions of what kind of awards the organization makes.

[http://fdncenter.org/  
grantmaker/contents.html](http://fdncenter.org/grantmaker/contents.html)

### Grantsmanship Center

Lists daily announcements of grants from the Federal Register and *Commerce Business Daily* as well as sections on arts foundations, community foundations, corporate foundations and donors, associations of grant makers,

## How Americans View Foundations

A report published in a recent edition of *The Chronicle of Philanthropy* shows that over 95% of Americans believe that private foundations play an important role in bettering society. Over 60% believe that trustees running private foundations need to be more accountable to the public and over 30% thought that private foundations should have to give away all their money after a certain period of time. Over 70% thought that the government should use tax policy to motivate people to set up private foundations, while only 7% believed there should be more extensive government regulation of foundations.

Source: Prince & Associates □

**pa@philanthropy.org.au**

### WEB SITE CURRENTLY BEING DEVELOPED

You can now contact *philanthropy* by email. Any suggestions please send to the above email address.

# The Vision Splendid

Philanthropic funds have always provided the venture capital for social development. A project now under way in Lakes Entrance in Victoria's East Gippsland is a living testament to the long-term vision of the Sidney Myer Fund and William Buckland Foundation and the vision and energy of many others. Jane Sandilands reports.

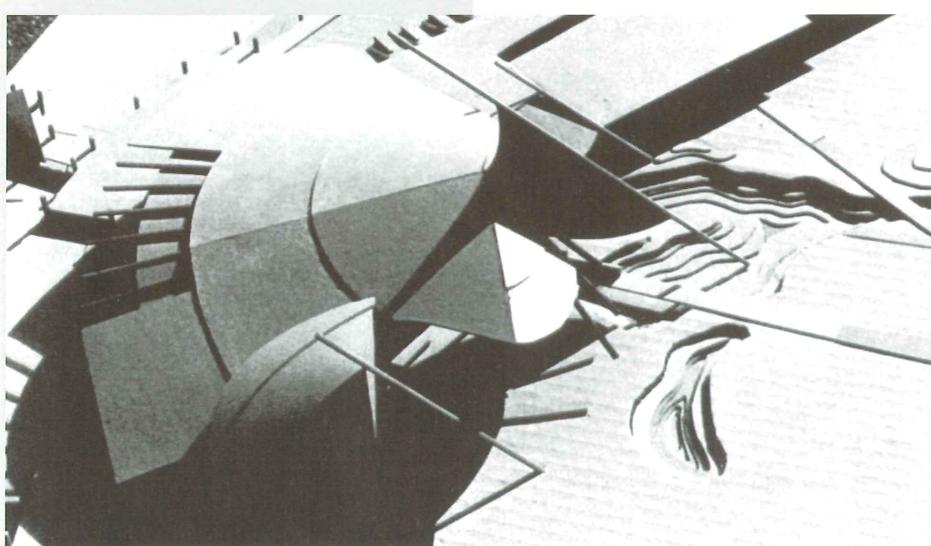
When Jennifer North stands on the sandhills of Bullock Island and points to what building goes where, how the fishing fleet will be part of the visitors experience and how the colourful maritime history of the area will be featured, you see a dream quickly shaping up to reality. Then she describes the involvement of RMIT and its plans – now well advanced – to use the project as a major research and educational institute with a focus on technology, giving the area much needed infrastructure. Then there is the involvement of the schools in the region, with the project being written into the senior student curricula. East Gippsland Institute of TAFE will be involved with vocational education and training and RMIT students – including many from overseas – will use it for pure and applied academic research. And this is only the start.

Now Project Director for the Gondwanaland Voyage and International Research Centre, North has lived and breathed the project from its beginnings some five years ago. Immersed in the communities of East Gippsland, she and others knew that they could not rely on the area's great beauty to develop its resources and a

sustainable future for its population. "People come to the area for a wonderful lifestyle but technologically, it is impoverished and intellectually isolated. If we can be on-line to the world, this can have a long-term generational impact on our children and their opportunities for the future," North said. The idea of a technologically-driven interpretive centre, to examine the rich sea and bird life of the region, together with opportunities for studying environmental science of value and interest to visitors, was born.

That this idea has grown well beyond what was initially envisaged is a tribute to the both the vision and co-operation of those in the region, including local government, different divisions of the Natural Resources and Environment Department of the Victorian State Government and the Victorian Eastern Development Association (VEDA). North says that the involvement of VEDA has been crucial to the project's early stages. "As well as giving wonderful support to the project, including providing an office, being linked with and auspiced by VEDA gave the project credibility from the start."

A community based organisation established in 1966, VEDA's core funding comes from members of the business community (at last count 148 members). It also receives funding from the East Gippsland Shire to provide economic development services for the East Gippsland region and has contractual relationships with State and Federal government



The project now embraces the educational, economic, social and environmental needs of the region, with important elements for the infrastructure for community development.

# Community Development



Jennifer North, Project Director

departments. With its mission "to promote encourage and facilitate the prosperity of the region and to safeguard the quality of the East Gippsland environment", VEDA's support of the Gondwanaland project was a natural alliance.

VEDA's Executive Director, Bruce Connolly, said that when first approached by Jennifer North, it was evident that the project would have a profound impact on the region. "We know that if East Gippsland is to develop, we need to capitalise on our natural competitive strengths to create sustainable industry and infrastructure," he said. "Since the beginnings of the project, we could see it deserved our full support, in people and resources."

When the Sidney Myer Fund gave seed funding for the project, it could see the possibility for the community to develop a plan to move to the next stage. This, North says, is the great value of the venture capital aspect of philanthropic funding. "It allowed us to look carefully at what we had, test the water with the communities

involved and find the best site." An important aspect of this early stage, North said, was to keep the concept flexible so the community could identify and embrace what was happening. "The important thing, as well as flexibility, is to keep the focus on the outcome, to ensure the integrity of the project isn't compromised," she said.

The site at Bullock Island was chosen because it is at the mouth of the largest estuarine lagoon system in Australia, with its wealth of natural resources. It houses the Lakes Entrance commercial fishing fleet and was the site of the old fish paste factory. It also has a prime position at the gateway to Lakes Entrance.

## RMIT University

RMIT's acceptance of the project has been wholehearted, regarding it as part of a "global university". At least four faculties/departments have been involved in the early stages: Environmental Design and Construction, Applied Biology and Biotechnology, Biomedical and Health Sciences and Visual Communication.

The project is, RMIT Vice Chancellor Professor David Beanland said, "An opportunity for RMIT to be involved with regional Victoria in a significant educational and research initiative, very much in keeping with its aims. It will be a considerable attraction to students in the longer term and offer sophisticated educational technologies which will feed into RMIT Victoria."

A Memorandum of Understanding has been signed between VEDA and RMIT, which commits RMIT to establishing a research and education facility within the project. Subjects such as environmental biology, plant biotechnology and marine research will be offered. Initially, five RMIT staff will attract up to 60 full time

undergraduate students in various disciplines, plus post-graduate students and visiting researchers. International summer schools will also attract overseas interest and the first overseas students to visit the region will be from Toyo University in February, 1998.

In line with RMIT philosophy, the Lakes Entrance facility will have a strong industry bias and collaborative research projects for government agencies and industry will form an important part of the Centre's work.

## Public Education

The planned Visitors' Centre will, in North's words, "excite and entertain" illustrating the rich environment of the East Gippsland area: the Lakes, the oil and gas fields, commercial and leisure fishing, the timber industry and agriculture and horticulture of the region. An important aspect will be the special relationship between the Koori community and the region. Mr Albert Mullett, Elder of the Aboriginal Kurnai Gunai community has been appointed cultural adviser to the Project. His position has been made possible by funding from the Lance Reichstein Foundation.

## The Role of Technology

Technology will play a significant part in the Centre's activities. It is planned that visitors will undertake an interactive "voyage" through the Centre, taking part in both group and individual activities. At the same time, visitors will be able to use the Centre's intranet to access information about regional assets and activities.

It is also planned to make considerable use of "smart" card technology throughout the Centre and surrounding facilities for visitors, students and staff alike.

# The Vision splendid



Bullock Island, Lakes Entrance

The Curriculum Development area will generate learning material and teaching aids for schools and visitors using material and assets from the Visitors' Centre intranet and the Centre will be open to the world via both public and secure World Wide Web access.

## Keys to success

A key to the success of the project, Jennifer North believes, is the level of collaboration, goodwill and co-operation from so many people when the project was first mooted. "We knew we wanted the region to be much more than a nice place to visit and that we had a lot more to offer," she said. Very early in the project, information architect Ian Large said that as well as identifying the obvious assets of the area, they should also look for the hidden assets. This set broader parameters, setting the project on the technology path, focussing much more on the long term.

This, she says, is the key to the project. "In the future, our children will have more choices. Technology will be part of their lives and they can have the

education, intellectual stimulation and awareness and the promise of a good life both in the region and beyond."

Further information contact:  
Jennifer North (03) 51 531 661

## Local organisations, individuals and industry who have given time and support:

- \* Woods Johnston Pty Ltd, Investigative Accountants: Feasibility Study
- \* Sedunary Lake & Partners Pty Ltd: Concept Plan for Bullock Island
- \* Dr Eric Bird, Geostudies: Geomorphology studies
- \* Mr Albert Mullett, Elder, Kurnai Gunai community
- \* Professor John Bird, John Bird & Associates: Multi-media information architect
- \* Mr Ian Large, Marvin Information Architects
- \* The Hon Peter McGauran, MP, Minister for Science & Technology
- \* Mr Henrie Ellis, Principal, Lakes Entrance Secondary College
- \* Mr Collon Mullett, Aboriginal Heritage Officer, Aboriginal Affairs Victoria
- \* Mr Craig Sutherland, Curriculum Coordinator, Lakes Entrance Secondary College
- \* Mr Ray Griffiths, Director, East Gippsland Institute of TAFE
- \* Mr Tim Weight, Chairman, TAFE
- \* Ms Helen Martin, Group Manager, Strategic Planning & Development, East Gippsland Shire Council
- \* Mr Laurie Norman, Business Manager, Catchment Management & Sustainable Agriculture Services, East Gippsland, Department of Natural Resources & Environment
- \* Mr John Strong, Fisheries Management Officer, Gippsland Region, Dept of Conservation & Natural Resources

# Publications

- \* Mr Paul Holton,  
Executive Arts Network East  
Gippsland Incorporated
- \* Mr Tom Davies, General Mgr,  
Lakes Entrance Fishermen's  
Co-operative Society Ltd
- \* Mr Bob Yeates, Managing Director,  
East Gippsland Newspapers
- \* Mr Ian Smith, Landsmith Pty Ltd
- \* Dr Patrick Coutin, Marine &  
Freshwater Research Institute,  
Queenscliff: Public Education
- \* Mr Robert Fordham, Chairman,  
Lakes and Wilderness Tourism and  
Gippsland Development
- \* Mr Robert Haldane,  
Superintendent of Police, Bairnsdale
- \* Mr Bruce Boucher,  
General Manager of Schools

## The Australian Directory of Philanthropy [1996/1997]

Now is your chance to purchase the only comprehensive listing of Philanthropic Trusts and Foundations in Australia!

This 8th Edition lists almost 300 Trusts and Foundations who together distribute over \$500M per annum to National, State and Local Community Organisations.

The Directory is the first step in the grantmaking process and a must for your organisation.

To order simply fill out the order form below and return with a cheque or money order for \$45 to:

**The Australian Association of Philanthropy Inc**  
**Level 3, 111 Collins Street, Melbourne 3000**  
**Phone: (03) 9650-9255 Fax: (03) 9654-8298**

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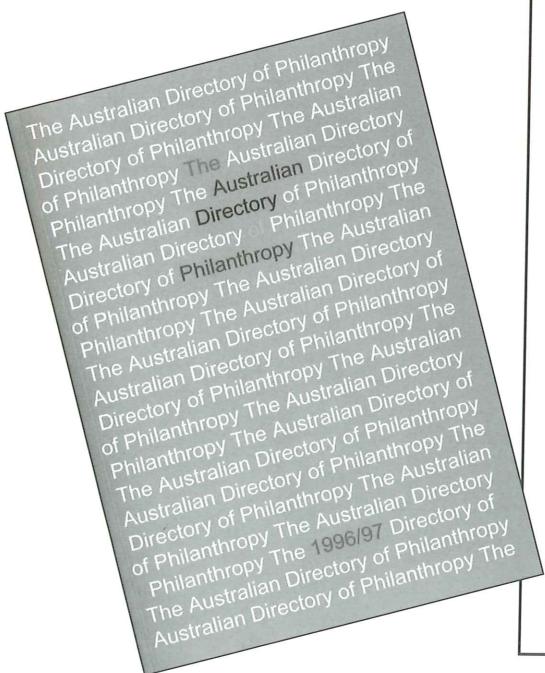
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# When in Rome

The Johns Hopkins 9th Annual Conference of International Fellows in Philanthropy was held recently in Rome. Heather O'Connor, Senior International Fellow in 1988, the Fellowship's first year, attended.

Representatives from 37 countries attended the Rome International Fellows Conference, which aims to bring together incoming Fellows to the Johns Hopkins International Fellowship in Philanthropy Program, with Fellows who have attended Hopkins since the inception of the program in 1988. Selected on the basis of their expertise as practitioners or researchers in the not-for-profit sector, fellows participate in the program within the Institute of Policy Studies for four or nine months, depending on whether they are Senior or Junior Fellows.

Held each year in a different country, the Conference undertakes to "showcase" the latest developments and issues confronting that country's not-for-profit sector, with the additional objective of receiving comparative information and feedback from the attending Fellows.

This year, the Conference topic was "The role of the Non-Profit Sector in the Modern Welfare State". Over 80 participants (Fellows, funders and guests) attended. The Australian delegation was made up of Michael

Liffman, Executive Director of the Myer Foundation, Mrs Neilma Gantner, Myer Foundation Director and myself as Senior International Fellow.

Given the number of delegates, the amount of time devoted to feedback and comparative information from people outside Italy was extremely limited. However those issues raised which are of direct relevance to the non profit sector in Australia included the following.

## Issues relevant to Australia

- The changing nature of the welfare State and the issue of balancing economic and social imperatives;
- Growing emphasis on the role of local government in the delivery of direct services;
- The need to clarify the role of not for profit organisations in relation to government and the private sector, particularly in terms of their ability to influence public policy in the light of contracting-out of services;
- The difficulty of maintaining the values of not for profit organisations, particularly their ability to advocate on behalf of clients when they are faced with increasing competition for funds or contracts from government;
- The need for accurate and relevant research into the nature and extent of volunteering and volunteers;
- The need for alternative sources of funding for non-profits (including financing through ethical bank loans);
- The question of the skills available and necessary for non-profits to manage the change to becoming more "business like" (for example, commercial, financial and project



management skills). How are these skills gained, maintained, evaluated and kept within the sector?

- What does "quality control" mean within the non-profit sector? How do non-profits "sell" their expertise in a climate of increasing competition with for-profit service deliverers?
- What is the role of non-profits in job creation, including the creation of jobs within the sector itself?
- Can/should non-profits prioritise in terms of the services they deliver, and what skills are needed to decide how best to position themselves in an increasingly competitive community sector?
- How can the sector be encouraged to challenge for-profit organisations with whom they compete, when the profit motive outweighs the needs of the community? What is needed to build solidarity amongst non-profits?

### **Challenge or threat?**

It was interesting to note that many, though certainly not all of the delegates, saw these significant questions as a positive challenge for the not-for-profit sector, rather than as a threat as seems to be more the case in Australia. This may be in part because most of the delegates were in a relatively privileged position in terms of their own paid work.

Nonetheless, one theme running through the Conference was a quite positive view of the changes facing the sector and the feeling that not-for-profits have a great opportunity to prove that their values, commitment and ability to understand and meet local needs outweigh any advantages that for-profit organisations may have. It should be stressed that this optimism was tempered by very real concerns



about improved training opportunities, a greater emphasis on "quality control" and the need for not-for-profits to work in solidarity to combat the threats arising from increased competition.

The changes to the welfare state world wide, including diminishing government funding, and the emergence of for-profit organisations in welfare service delivery, are forcing the non-government sector to undergo often painful change themselves.

The unanswered question as yet in my mind is how the sector can best be supported in this time of transition to ensure that the strengths it has are maintained and increased. It is crucial that the people who have invested so much of their energy into not-for-profit activities are themselves valued and supported. □

For further information:  
Contact Heather O'Connor,  
Telephone/Fax (064) 934 811

# The Leaving of a Legacy

The Stegley Foundation is winding up. Part of this process is focussing its sights on the potential of philanthropy for social change.

By Trudy Wyse

**T**he Stegley Foundation is now in the final phase of its life. Established by Brian and Shelagh Stegley in 1973, it was always envisaged as having a limited lifespan.

With only five or so years remaining, the Trustees feel a greater sense of urgency in their commitment to tackling the structural causes of disadvantage and discrimination, and of promoting a more just and tolerant society.

With this in mind, during 1996 the Trustees embarked on a major review of the Foundation's priorities and practices. Its aim was to identify how they might make the best use of financial and other resources in the remaining years, in order to make a real and lasting contribution to progressive social change.

In the words of Sarah Stegley, "Facing the death of the Foundation provides an opportunity for a new and sometimes different direction and a focus to the remainder of its life".

The vision and directions to emerge from this review are not a radical departure from past work. Rather, they give a more focussed and strategic approach, to enable us to best meet the Foundation's goals.

The Foundation's funding program will now be known as the Local Community Development Program. Our priority areas will remain the same - people with disabilities, Aboriginal communities, disadvantaged women, youth and older people. What has changed is that there will be a far more proactive approach to developing, implementing and supporting the projects to which we provide funds. Projects will be identified and developed through consultation with people and organisations working in our priority areas, and we will be actively involved in supporting and monitoring the projects as they evolve.

The projects funded under the Local Community Development Program will be seen as an interrelated set of projects with an overall integrating theme. The strategic principles which will underpin the Program include the following:

- Projects will be based in local communities and designed to strengthen community networks.
- Projects will be directed at unlocking other resources or potential, primarily by making local and other governments more responsive and equitable institutions. Governments at all levels should be expected to give priority attention to the well being of their communities, particularly those most disadvantaged.
- Projects will consist of a partnership between groups with accountability to particular communities and people/organisations with established expertise.



Shelagh Stegley, Founder, The Stegley Foundation

# Member Profile



Brian Stegley, Founder, The Stegley Foundation

- A major element of project outcomes will entail the effective dissemination of quality information, in the form of ideas, program specifications, benchmarks, strategies and plans which can be utilised by other communities and with the capacity to empower disadvantaged groups.
- Projects will be designed to challenge existing discriminatory policy and practice and have clear potential to lead to social change.

This new phase does not mean that the Foundation will stop receiving submissions. Many of the projects funded may be suggested by community groups or other organisations. However, all projects will be consistent with our strategic principles, and funded groups will need to accept that we may have a more active relationship with the projects than has occurred in the past.

The dissemination of quality information is one of the major outcomes for all funded projects and we will be publishing the written material from each project as a co-ordinated series of publications. All

material will be edited, in consultation with the project's auspice body, to ensure that it is relevant and user friendly to a wide audience. The series may also include work completed by other groups, for which we simply provide editorial and publishing assistance.

Given that the Foundation has adopted a more focussed and proactive approach to its grant making, the role of the personnel administering the Program has also changed.

Fiona Moore, Senior Administrator with the Foundation for eight years has moved on to new challenges. Trudy Wyse, with a background in community development, local government management and program evaluation, was appointed to the new role of Manager, Community Development and began working with the Foundation in June. This position will have a greater emphasis on bringing together people and organisations working in our priority areas to identify suitable projects, and then to provide an active implementation, support and monitoring role.

A major feature of the Local Community Development Program will be a greater emphasis on a partnership approach to supporting specific projects or groups of projects. This may be by seeking funding partners for projects we are developing, supporting the initiatives of other organisations, or disseminating and extending ideas of programs already developed. The Manager will play a major brokerage and networking role in developing these partnerships.

One way of providing projects with the expertise necessary to ensure successful outcomes will be through the establishment of ad hoc advisory committees consisting of people and organisations active in the relevant area

to give advice and support as the project progresses. A further role to which the Foundation remains actively committed in its final years is the encouragement of both the growth and co-ordination of progressive philanthropic networks and the involvement of individual donors in progressive philanthropy.

The strategic framework of the Stegley Foundation has been completed and will be published in the Foundation's most recent Annual Report, available in October. □

For further information on Stegley's new directions and guidelines for funding, Contact Trudy Wyse on Telephone: (03) 9826 2777 or Fax: (03) 9826 2183. The Stegley Foundation funds only in Victoria.



Trudy Wyse, Manager, Community Development, The Stegley Foundation

# New grants

First of a regular column featuring new grants made by members of Philanthropy Australia.

## The Myer Foundation

45th Floor, 55 Collins Street,

Melbourne, 3000

Tel: (03) 9207 3040

Fax: (03) 9207 3001

Greenfleet \$30,000

The Myer Foundation joined VicRoads, Mobil and the RACV to establish a scheme which invites Victorian drivers to contribute \$25.00 at the time of paying car registration towards planting trees to offset carbon emissions.

"Opting into Active Citizenship"

The Myer Foundation commissioned a study exploring the idea of a non-military, non-compulsory national community service program for young people. The report was completed in July 1997 and is available from RMIT, telephone (03) 9468 2871 or e-mail: l.hartnell@rmit.edu.au

## The Sidney Myer Fund

45th Floor, 55 Collins Street,

Melbourne, 3000

Tel: (03) 9207 3040

Fax: (03) 9207 3001

Kimberley Land Council \$20,000

The Sidney Myer Fund has joined other philanthropic trusts in supporting a link-up program managed by Aboriginal people in the Kimberley region. The program provides for individual families and communities to research and document their histories

and to fill the gaps left by removal of children and resulting community dislocation.

## The Ian Potter Foundation

Level 3, 111 Collins Street,

Melbourne, 3000

Tel: (03) 9650 3188

Fax: (03) 9650 7986

Royal Melbourne Hospital, Victorian Infectious Diseases Service:

Mr DG Campbell, Victoria

To recognise the 150 years since the Hospital's founding, the Foundation recently committed to the establishment of the Ian Potter Foundation Infectious Diseases Fellowship. The program offers the selected fellow the opportunity to work under the stewardship of Professor Graham Brown, Director of the Unit and a world expert in the field.

YWCA (Sydney) NSW

The Foundation continues its support of the refurbishment of a floor of one wing of the YWCA building in the centre of Sydney. The centre provides permanent and short-term safe housing, together with a large range of programs.

## The Lance Reichstein Charitable Foundation

Level 5, 165 Flinders Lane,

Melbourne, 3000

Tel: (03) 9650 4400

Fax: (03) 9650 7501

Uniting our Rural Communities Foundation for Australian Agricultural Women

For a project to target isolated farming women, bringing them together in local towns and small communities to meet and discuss plans for their future

in the face of declining farm prices and markets. Forums are run over 6 months, beginning with a 2-day program for training of leaders who then develop a wider program involving the women.

The Australian Youth Parliament for the Environment

Natural Step Environmental Institute

The Australian Youth Parliament is an initiative of the Natural Step Institute and was established by two young women who were sponsored to travel internationally to learn about youth projects and opportunities for Australia. The Australian Youth Parliament is part of the Global Youth Action for the Environment, involving over 150,000 young people from 18 countries. Funds will go to the publication of a newsletter for schools and others, organisation of a conference and other education activities and sponsoring two delegates to attend an international conference in November.

Queen of Hearts: The Needs of Women with Gambling Problems

A project of the Financial and Consumer Rights Council (Inc.) and funded jointly by the Victorian Women's Trust, Lance Reichstein Foundation, the Myer Foundation and Melbourne City Council and co-espoused with the Consumer Law Centre, Victoria.

A community-based research project to analyse the needs of Victorian women who identified as having problems with gambling. □

Announcements of grants to appear in Philanthropy can be sent to:

The Editor,  
Philanthropy Australia, Level 3,  
111 Collins Street,  
Melbourne, 3000.

Philanthropy

# Philanthropy

## The Journal

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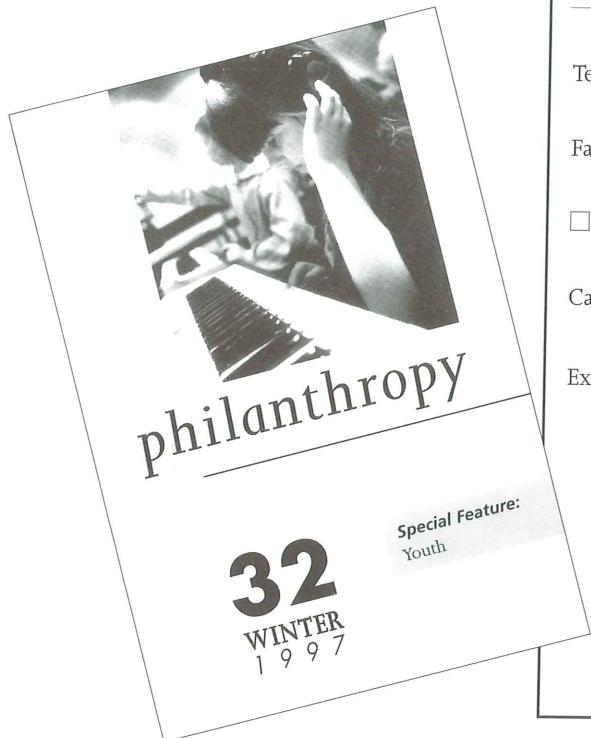
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Australian Association of Philanthropy Inc.  
3/111 Collins Street, Melbourne 3001  
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# Australia takes a lead

A conference on community development never before to leave the shores of the North American continent was held in Melbourne in July 1996. It attracted 470 participants from 17 countries. Members of the Westate\* Organising Committee, Andrew McCallum and Anne Somerville, report.

**I**t is just over a year since the Community Development Society's (CDS) International Conference was held in Melbourne. Having won the right to host the conference in Australia two years before, Westate considered that the long planning phase would ensure a conference of exceptional quality.

The over-arching goal was to showcase Australian community development and in particular, to highlight the work being achieved in Australian indigenous and rural communities, as well as offer as broad an international representation as possible.

Westate harnessed some of the remarkable Australian talent and energy in this field in the National Steering Group. Drawing on academics, practitioners, politicians and community organisation leaders, the Group helped select speakers and gave valuable networks through which to recruit Conference participants.

## Conference objectives

- Bring people to Australia with significant achievements and international recognition in the field of community development, to share knowledge with Australian practitioners;
- Exchange information on world best practice;
- Give an opportunity for Australians engaged in community development programs (including economic, environmental, community services, family relationships and adult education) to exchange experiences with those in other countries;
- Give an opportunity to legitimise the work of both government and community agencies in the area of community development;

## Resources and Sponsors

Convening an international conference requires enormous support and considerable financial resources. Soliciting support was difficult given the apparently intangible benefits to the local community. Certainly, the majority of foreseen outcomes focussed on qualitative rather than quantitative achievements. For some sponsors, this was outside their charter.

Costs are critical in staging the conference. Many are incurred before participants register and it is crucial for an organising body to have some up-front capital so as not to jeopardise the success of the conference. The experience for conference organisers is nerve-racking – rather like playing the futures market and we were extremely fortunate to have enlisted some key sponsors in the early stages.

First among them was the Ian Potter Foundation. Although not the single largest sponsor to the conference, they caught the vision in a way that encouraged others to come on board.

- Assist in building networks within Australia and the Asia-Pacific region;
- Showcase Melbourne and Australian lifestyle to an international audience committed to improving the quality of life in their own countries;
- Showcase Victorian and Australian initiatives in community development, including telecottages, community mediation, distance education and rural counselling.

**The CDS seeks to give a global perspective of community development through its leadership, knowledge and exchange to both professionals and citizens across the spectrum of community development.**



Latje Latje Aboriginal Dancers, Mildura, Victoria

These included the Hugh Williamson Foundation and our major sponsor, the William Buckland Foundation, administered through ANZ Trustees. From the private sector, the Bendigo Bank gave both in-kind and financial support, in line with their commitment to rural communities. The then State Department of Health and Community Services also gave a substantial grant and at the Commonwealth level, AusAid gave funds to bring participants from developing countries to Australia.

## Program highlights

There were outstanding speakers and over the three days of the conference, a cultural stream of events. These included Aboriginal dance groups, an Afro-American youth dance group from Philadelphia, a performance by the Melbourne-based Women's Circus and performances by local musicians. There were also visits to Australian colonial entertainment and a performance by Aboriginal artists Archie Roach and Ruby Hunter.

A first for a CDS conference was the indigenous stream, bringing together Australian, Pacific Islander, African,

Maori and Indian community knowledge and experiences. We expect that this stream will continue at future conference.

## Speakers and perspectives

The conference was organised in global, regional and local perspectives with the addresses of keynote speakers focussing the day's discussions. Victorian Premier Jeff Kennett spoke on the perspective of community development in the Government context. Juxtaposed with the first keynote address from Professor Garry Craig of the UK, this stimulated an energetic discussion. Another critical perspective was given by Dr Dale Spender, recognised for her role in developing opportunities for women. Professor Marcia Langton, Chair of the Faculty of Aboriginal and Torres Strait Islander Studies at Northern Territory University gave a thought-provoking anthropological analysis of the place of indigenous Australians during the past two hundred years.

Dr Marcelini Delgado, Consul General for Cuba in Australia, presented the

Cuban experience in redeveloping the country through a grassroots movement to raise the standard of living. The address from Mr Etienne Nel, academic and multi-cultural community worker in South Africa, provided stark contrasts to our perspectives on community development.

Given the diversity of countries represented and views of participants, we approached the Conference as an opportunity to encourage a 'warts and all' approach. Responses from presenters and participants alike indicated that this was one of its great strengths.

## Pitfalls for new players

Inevitably, there were pitfalls. Pivotal to Westgate's successful bidding was the promise to deliver in a world class venue, offer a diversity of speakers and meet the traditional requirements of the CDS. This included 'in-time' delivery of video-tapes of the keynote addresses, allowing those in the United States who were unable to attend to participate in their annual conference. This was to be achieved while keeping participants' costs to the level of previous conferences.

Another key aspect was our negotiations with the venue. World class venues do not come cheaply and can be more expensive than initial expectations. The "add ons" can be very significant. "Hiring a room" suddenly meant just that - no technology included, sometimes not even tea and coffee! On site catering also means the inability to contain costs or to seek cheaper alternatives. We also needed to take into account the expectations of many speakers, among them a "special rate" to attend and sometimes a payment as well. Complimentary registrations must be kept in control.

# Australia takes a lead (continued)

## Lessons for new players

In terms of lessons for new players, the preparedness of the organising body to create, sustain and deliver their shared vision is a testing one. Events are usually run in addition to other professional commitments and organisers need to treat the event as an endurance test rather than a spectacular sprint. Conference organising is a demanding task, not to be entered into lightly. It must be well resourced, as it has the potential to be financially devastating. Although professional conference organisers seem to be initially expensive, they can be the difference between success and failure.

## Conference Achievements

There were some clear positive outcomes. There is now a greatly enhanced relationship between Australian and international comm-

unity development practitioners. There has been an increased impetus for many organisations to take up the challenge of delivering their services within a community development framework. There is a greater international appreciation of contemporary Australian experiences and initiatives which have, in many cases, led to new links being forged between services, education or organisations

The establishment of an Australian network, with the likelihood of a number of Australian chapters being generated in what was previously a relative disparate field is one of the most enduring achievements of the Conference. □

\*Westate is an independent organisation under the auspices of South West Community Care, Warrnambool, Victoria and St Luke's, Bendigo, Victoria

For further information:

Telephone: (03) 5440 1100  
Facsimile: (03) 5442 2316



Point Breeze Dance Troop, Philadelphia, USA

# Positive Rural Futures

The Positive Rural Futures Conference was held in May this year at Charters Towers in Queensland and jointly sponsored by The Office of Rural Communities and The Priority Country Area Program (PCAP). Among the objectives of the conference were to encourage community members to take charge of their own futures, to promote rural communities and celebrate rural living and to foster creative solutions to challenges facing rural communities. Participants included those living in rural communities, representatives from local government and rural industry groups, regional economic development organisations, rural lobby groups and rural human service organisations.

Peter Kenyon\* gave the keynote address.

His **Twenty Clues to Achieve a Vibrant Rural Community** are:

1. A vision of the future which is shared by the community.
2. Self reliant spirit – belief that one's economic and social destiny lies in the community's hands and that full use of internal resources – human, physical and financial – is required.
3. Commitment of time and priority by capable and respected leaders to local development efforts.
4. Willingness to experiment, make changes, take risks and invest in the future.
5. Positive "can do" spirit – action oriented, with a reputation for being "available for action" and "getting things done".
6. A participatory approach to community decision making – community involvement and consensus is strongly valued and the talents of people from all walks of life are mobilised.



7. Opportunistic in nature – engaged in a never ending search for development options, resources and possibilities.
8. Locally based focus and structure for facilitating and managing economic and social development.
9. Evidence of community pride and confidence in terms of infrastructure and business life.
10. Active encouragement of young people into leadership roles.
11. Enthusiastic acceptance and promotion of women in leadership roles.
12. Strong belief in and support for local educational opportunities.
13. Support for and appreciation of local business.
14. Local government council which provides leadership and vision, and is viewed as a "facilitator" rather than a "regulator".
15. Recruitment, involvement and recognition of volunteers is given constant attention.
16. Presence of a positive local newspaper, matched with local skill in using the media effectively.
17. An ability to rise from failures, shortcomings and unfulfilled projects, to learn and move on.
18. An awareness of and an ability to utilise outside resources and skills.
19. Evidence of a practical development agenda and strategic planning approach which focuses on realistic goals, regular achievements and long term plans.
20. Presence of good stories to be told and a community determined to have them heard! □

\* Peter Kenyon is a founder and director of the International IDEAS Group which currently comprises IDEAS (Australia), Southern African IDEAS and the Centre for Small Town Development. The IDEAS Group is primarily concerned with the design, implementation and evaluation of local, regional and national employment and economic development policies and projects.

For further information about the Positive Rural Futures Conference, please contact Liz Dalley, Office of Rural Communities,

Phone (07) 3225 8031  
or Fax (07) 3225 8062.

e-mail: [ldalley@qdlgp.qld.gov.au](mailto:ldalley@qdlgp.qld.gov.au)

# Alcoa and community funding

Alcoa in Western Australia has a program involving funding of community groups for landcare.

Community groups apply to Alcoa, giving a proposal related to the Company's Regional Landcare Program. Alcoa's focus has been on strategically significant works such as waterway and wetland restoration.

Assessment was through a community advisory panel of seven people, drawn from the relevant region. Initial assessment and allocation generally took one evening, with follow-up required to renegotiate some projects, a task undertaken by Alcoa staff or an outside consultant.

## The Disappointment Factor

Because the initial funding in 1994 of \$210,000 met the needs of existing groups, people were happy and the system worked well. By 1996, over \$400,000 was being sought and while all groups received some funding, it was not necessarily the amount they had requested. This caused what Alcoa refers to as a 'disappointment factor' with some groups and the community advisory panel. Alcoa felt uncomfortable with an increasingly bureaucratic and paper driven process and the early 'zing' of the programs was thought to be fading.

## Changing the Process

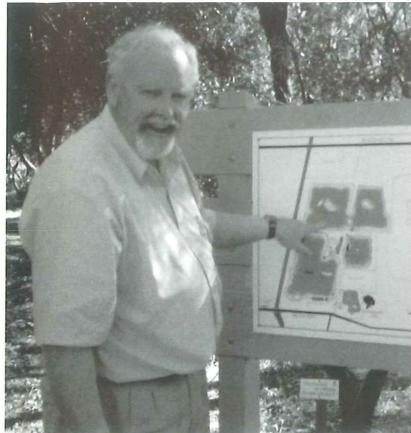
In 1996, two critical steps were taken. Alcoa made the criteria for involvement more focused and the program now operates as a 'Rivers, Wetlands and Habitats' initiative. The process of determining funding was devolved to five or six region and catchment groups. Alcoa staff and members of the Community Advisory Panel visited 'groups of groups' in each of the main sub-region or catchment areas and encouraged them to develop integrated project proposals across their area. Some areas already had groupings and in other areas, groups were encouraged to form.

Based on earlier allocations, Alcoa guaranteed each area a certain amount each year for the next three years (usually between \$25–40,000), with a small discretionary pool available for flexibility. Guidelines consist only of six essential and four desirable bullet points – a total of 73 words.

Each sub regional group worked with the smaller groups in its area to develop a package of proposals within the approximate focus of the funding criteria. Two or three members of the Advisory Panel met the sub-group, discussed the package and reached agreement. Generally instant decisions on funding were made that evening. The full Advisory Panel later reviewed the thrust of the program for future years.



Community managed wetlands



John Collett, Landcare Manager, Alcoa

## Results

In four years, over \$800,000 has reached strategic on-ground works in a critically important environment. This has been achieved with minimal administrative outlay, minimal committee structures and the building of warm and genuine relationships between all involved. The number of active groups has increased and they have coalesced into cohesive sub-regions. Anecdotal information suggests that between \$3 and \$5 million may have been spent by landholders on projects, with the initial Alcoa contribution acting as catalyst. In 1997, the total range of completed works will be analysed. Where appropriate, 'meshing' of projects into a regional network of wildlife corridors and repaired waterways will be carried out, and gaps identified to be targeted in subsequent years.

## Critical elements

### Continuity

The program is closely integrated with the existing landcare effort operated out of Pinjarra by Agriculture WA.

### Timing

The program started while landholder enthusiasm for on-ground work was increasing.

### Scale

All key players can fit in a country hall for afternoon tea.

### Local Insights

At least one member of the Community Advisory Panel is personally familiar with each project.

### Trust

There is no overt audit process. Alcoa trusts the groups and the groups trust Alcoa.

### Bottom lines

These are clear and simple. There is no confusion over the aims of the project. What you see is what it is. Guidelines are 73 words long.

### Consultative development

At every main step, groups and individuals have had the options discussed with them and can see how their views have been important. However, there have been no workshops or formal strategic development process and no inch thick documents.

### Sequential development

The program is under constant review and has managed to stay ahead (maybe just) of changes and opportunities.

### Instant decisions

Decisions on projects are generally made on the spot, with fewer than 5% needing further consideration or negotiation.

### Communication

Phone contact with all groups immediately follows the decision-making process and any difficulties are negotiated directly. There are no impersonal letters. Ineligible projects are given assistance and 'space' to become eligible.

### Discretionary funds

There is always scope for some adventure. □

Further information:  
John Collett, Alcoa Landcare

**Tel: (089) 316 5295**  
**Fax: (089) 316 5166**



Community managed wetlands

# Launch of new era in Queensland

The Queensland Community Foundation was officially launched in May this year, creating a surge of interest and enthusiasm for the strength and vitality inherent in all community foundations – but this one in particular.



Archbishop Peter Hollingworth and QCF Board member Ms. Helen Ryan at the launch of the Queensland Community Foundation

Archbishop Peter Hollingworth summed up in just a few words what the Queensland Community Foundation (QCF) can do: "It enables people without huge means to make modest gifts for community benefit." Commenting at the Foundation's launch on the fact that we live in an era of steady withdrawal from the security of the welfare state, he said this had been replaced with a "welfare society – with all taking responsibility".

Former Premier Mike Ahern, Chairman of the Foundation, said that behind its enthusiastic and early acceptance by Queenslanders lay two important factors: a transparent operation which is cost effective.

Bryan Grehan, consultant to the Queensland Community Foundation, said that the most appealing aspect of a community foundation is that it allows the average person to become involved in philanthropy "because they can now afford it".

Philanthropy, he adds, need no longer be the sole preserve of the wealthy. In the United States and elsewhere, community foundations provide a mechanism for people of average means to have a very real impact on the welfare and future of their community.

Community foundations benefit the community in a number of ways.

- They make it financially viable for people, groups and organisations to become involved in philanthropy during their lifetime and after.
- They provide a mechanism whereby "a culture of philanthropy" can be developed in families and communities by providing continuity and involvement.
- They make it easy for defined geographical areas to establish their

own "foundation" (for example, The Sunshine Coast Community Foundation) by providing a structure, trusteeship and advice to community leaders.

- They create a permanent source of funding for charitable works, the arts, science and medical research.
- They encourage excellence in community service standards by recognising individuals, groups and organisations that give outstanding service to their communities.
- They identify the current and emerging needs of the community and help prepare the way ahead.
- They provide advice and research for donors and prospective donors.
- They provide a mechanism for charities and other non-profit organisations to build their own "permanent foundation" to provide income to meet operations costs in the future.

## Queensland Community Foundation: the beginnings

The Queensland Community Foundation was settled by the Public Trustee in early 1997 and a Board was appointed to help foster the growth of the Foundation and advise on grants and community needs generally.

The QCF name had previously been used by ANZ Trustees, however when it became apparent to ANZ that the Public Trustee had the capacity and desire to drive the growth of a community foundation in Queensland, the name was made available for the new Foundation.

Some of the named and regional funds that were established under the old QCF have become part of the new Foundation.

## Philanthropy

## Corporate appeal

The structure of the QCF has particular appeal to corporations, Bryan Grehan said. Among the benefits they receive are recognition by their clients as a caring corporate citizen, together with the fact that they can be seen to support the whole community, rather than a few organisations. They also have the choice of supporting only those communities in which they do business. If companies want involvement into which organisations receive funds, they can have as much – or as little – as they wish. Above all, Bryan Grehan says, the QCF offers a cost effective mechanism for a corporate giving program. "I can say quite confidently that nowhere else can a person or organisation establish a charitable trust with no establishment fee, no administration fees, and such a low capital amount." "Usually," he added, "one would need a minimum capital amount of \$100,000, face legal costs of around \$12,000 and pay annual administration fees."



Mike Ahern, Chairman,  
Queensland Community Foundation

The Foundation's mission is to serve the state's communities by providing a permanent source of funding for charity. It encourages Queenslanders to "give something back" to their community. Through the Foundation, it is possible for Queenslanders to establish a named fund during their lifetime for a capital amount of \$10,000. Gifts of \$500 or more can be made to the QCF or to any of the foundations under the Queensland Community Foundation umbrella.

No administration charges are paid when people give through the Foundation. Its development is funded only through direct donations for that purpose and corporate sponsorships.

Investments are made by the Public Trustee and managed by the Queensland Investment Corporation. Activities of the Foundation are overseen by an Advisory Board of people with experience and expertise in the community and financial fields.

The Queensland Community Foundation is a tax exempt organisation and any donation of \$2 or more to the Foundation or any of its named charitable funds is tax deductible. □

For more information:  
**Tel: 07 3213 9288,**  
**Fax: 07 3213 9489**  
or PO Box 1414, Brisbane, Qld. 4001

## Advisory Board Queensland Community Foundation

- \* The Hon Mike Ahern, Chairperson, Former Premier of Queensland and consultant to business and industry
- \* Mr George Curphey, Trustee, Sylvia and Charles Viertel Foundation
- \* Mr Tim Feely, Deputy Director, Community Services & Development, Public Trustee of Qld.
- \* Ms Grace Grace, Assistant General Secretary, ACTU – Queensland Branch
- \* Mr Peter Hall, Public affairs practitioner
- \* Mr George Higgs, Former International Director, Lions Club, Australia
- \* Archbishop Peter Hollingworth, Archbishop of Brisbane
- \* Mr David Mills, Director, Client Services, Public Trustee of Queensland
- \* Ms Linsey Plante, Founder and Principal, Commercial Study Centre, Townsville
- \* Ms Helen Ryan, Partner, Deacons, Graham & James, Lawyers
- \* Mr Hayden Sargent, Radio personality, author, community worker
- \* Dr Margaret Steinberg, Director, Healthy Ageing Unit, Dept of Social & Preventative Medicine, Uni of Qld.
- \* Mr John Thomas, Executive Director, Space Transportation Systems Limited

# Lotteries in Western Australia

Established in 1933, the Lotteries Commission charter was to eradicate private lotteries and instead to run an approved lottery, with the proceeds going to the Western Australian community.

The Lotteries Commission recently released the results of a research study on the impact of Lotteries grants in the community over the past five years.

The study covered over 11,000 grants worth \$160 million to around 5,000 organisations made over five years between 1990 and 1995. Over 1,000 people participated in the study.

The project included an in-depth study into the impact of lotteries grants in two particular regions: Carnarvon and Armadale.

Case studies covered in the report include Lotteries funding for emergency relief, the Royal Flying Doctor Service, funding for people with disabilities, state of the art medical research funding, funding for children's play equipment and funding for aged services.

Included among the 11,000 grants made during the period were:

- 617 grants for vehicles
- 294 grants for major building projects
- 1680 grants for office equipment
- 1155 grants for special projects

The report also found that WA Lotteries funding is unique in Australia in the range of organisations and services supported.

Among other findings were:

- Lotteries funding fills gaps for which there is no other source of funding, particularly that for infrastructure;
- Lotteries grants are one of the few examples of funding made in response to requests initiated in the community rather than in an attempt to meet closely pre-defined objectives;
- Economic benefits from Lotteries grants include an estimated 900 jobs generated;
- Community groups funded experienced improved efficiencies and effectiveness in the delivery of their services;

- Groups reported improved morale and self esteem as well as improved reputation amongst peers and the community after receiving Lotteries grants;
- Many grants helped organisations attract more volunteer support and, ultimately, improve the delivery of their services;
- Many Lotteries grants allow community programs to be extended or sustained at a critical level;
- The flexible nature of Lotteries funding allowed smaller organisations and those not regarded as 'mainstream' to access funding for innovative projects;
- Benefits from Lotteries funding flowed across the entire community affecting families, individuals and local communities.
- As well as direct benefits there were many indirect benefits from Lotteries funding – for example tourism benefits from conservation funding;
- Lotteries grants help sustain community relationships – (families, social, work) and combat isolation of individuals.

The researchers singled out two comments made during the study which reflected community sentiment towards the Commission:

**"The Lotteries Commission is part of the delicate fabric of funding that keeps this sector together."**

**"It is like they (the Commission) are sowing seeds in the community through the trust they extend to the groups they fund."**

Note: The Western Australian Lotteries Commission has produced a 40-page document detailing the research and its findings.

To obtain a copy, please ring the Community Funding Department on

**1800 655 270 or (08) 9340 5270**



**Philanthropy**

# Lawyers and Foundations

There is often great interest expressed by those making a Will in setting up charitable trusts or foundations. One Sunshine Coast lawyer seeks to make this easier and more affordable by helping them get access to the Queensland Community Foundation.

Terry Boyce has been in practice for twenty years, founding the firm now known as Boyce Garrick. Over the last 15 years he has seen increasing interest from clients who wanted to set up a charitable trust, either for a specific purpose or for general charitable purposes within the Sunshine Coast community.

In each instance, the client was relatively wealthy and wanted to give something back to the community.

Though the desire to set up the trusts was strong, they did not come to fruition because of the high cost of establishing the trust, the ongoing cost of maintaining a trust (including audit fees) and the responsibility of ongoing investment decisions.

Other clients who came to Terry Boyce to make a will either did not have any close surviving relatives or their children were already successful and wealthy in their own right. While they contemplated leaving a substantial part of their estate to their favourite charities, they often decided against this course because of their concern that their monies would be largely used up by the charities for administration fees.

With the establishment of the Queensland Community Foundation with the co-operation of the Public Trustee and free of fees to those who donate, Terry Boyce says that it is now very easy for people to donate to charities while they are still alive. "They can either do this and obtain a tax deduction or alternatively leave all or part of their estate to charities using the

Queensland Community Foundation. They know that none of their money will be used in administration costs and that the Board of the Foundation will ensure the monies are used for the purposes they have specified."

Terry Boyce says that the practice actively encourages clients to use the Queensland Community Foundation for tax deductible donations to charity.

Boyce Garrick has taken the unusual step of setting up its own charitable trust under the Queensland Community Foundation umbrella. Known as the Boyce Garrick Charitable Trust, clients of the practice can place monies in the Trust. Dedicated to building a substantial and ongoing source of funding, it will support charities and community groups which receive little or no financial support from Government or other sources. Priority will go to projects giving direct benefits to those most in need and to organisations with high levels of volunteer involvement and low administration costs.

Another initiative taken by Boyce Garrick is to encourage their larger clients to consider establishing a named charitable trust. In the first few weeks after the establishment of the Queensland Community Foundation, many people included it in their wills.

Terry Boyce says that it is an exciting development, with potentially huge benefits to worthwhile causes. "It is important," he said, "for professional advisers such as accountants and lawyers to be aware of the existence of the structure of the Queensland Community Foundation and its benefits."

And to the often repeated criticism that Australians are not philanthropic at heart, Terry Boyce disagrees. "In Queensland, this is certainly not true. Until now, I believe there were too many obstacles in the way for them to carry through their good intentions. With that changed, I think there will be a strong increase in philanthropic activity."

## Philanthropic gain without pain

The financial services section of Boyce Garrick lends over \$25 million each year. Most loan applications come through finance brokers. However a percentage of borrowers make direct approaches to Boyce Garrick for finance. Such borrowers are usually sufficiently commercially experienced to be able to properly present the information required to satisfy Boyce Garrick's guidelines.

While Boyce Garrick do not charge a fee for both borrower and lender, those borrowing directly from them expect to pay a broker's fee. In what could be seen as a master stroke to advance philanthropic giving without pain to the giver, Boyce Garrick charges a brokerage fee of between 0.75 and 1% – which goes straight into the Boyce Garrick Charitable Trust. The client gets the tax deduction – a fact which makes most very happy – and the Charitable Trust grows. A further benefit is that the transaction helps 'change the culture' to one that brings the benefits of philanthropic activity to a business transaction.

Boyce Garrick Lawyers is a legal firm based at Mooloolaba on Queensland's Sunshine Coast. The firm's founder and now senior partner, Terry Boyce, has been in practice on the Sunshine Coast since 1977. The firm now has four partners, six solicitors and 21 support staff, making it the largest legal practice on the Sunshine Coast offers services in litigation, family law and general legal and financial services. □

For more information,  
Contact Terry Boyce:  
**Tel: (07) 5444 1977**  
**Fax: (07) 5444 6122**

# Home & Abroad ...

## HOME

### Conferences...

#### A.C.O.S.S. Congress 1997

**When:** 6 - 7 November, 1997  
**Where:** Melbourne Town Hall, Melbourne, Vic.  
**Enquiries:** Conference Solutions  
**Ph:** 02-6285-3000  
**Fax:** 02-6285-3001

#### First National Rural Public Health Forum, Adelaide S.A. Info

**When:** 12 - 15 October, 1997  
**Where:** Adelaide, S.A.  
**Enquiries:** National Rural Health Alliance  
P.O. Box 280,  
Deakin West, ACT  
**Fax:** 06-285-4670  
**Email:** nrha@post.hen.net.au

#### Child Abuse-Neglect

**When:** 20 - 23 October, 1997  
**Where:** Adelaide, S.A.  
**Enquiries:** Festival City Conventions  
**Ph:** 08-8363-1307  
**Fax:** 08-8363-1604  
**Email:** fcceaton@ozemail.com.au

#### Professional Recognition of Social Work

**When:** 10 November, 1997  
**Where:** Melbourne, Vic.  
**Enquiries:** AASW Vic. Branch  
**Ph:** 03-9663-3889  
**Fax:** 03-9639-1820

# Coming Events

## for Members

### ABROAD

#### Conferences...

##### European Foundation Centre 1997 Annual General Meeting

Theme: The European Union and the Social Economy:  
Challenges & Responses

When: 7 - 8 November, 1997  
Where: European Parliament & Plaza Hotel  
& Conference Centre, Brussels  
Enquiries: European Conference Centre  
Rue de la Concorde  
B-1050 Brussels, Belgium  
Ph: 0011-32-2-512-8938  
Fax: 0011-32-2-512-3265  
Email: aga@efc.be

##### Council on Foundations Family Conference, Washington

When: 22 - 25 February, 1998  
Where: Los Angeles, California,  
United States of America  
Enquiries: Rochelle Colclough  
Ph: 0011-1-202-466-6512  
Fax: 0011-1-202-785-3926  
Email: color@cof.org

##### Council on Foundations 49th Annual Conference

When: 27 - 29 April, 1998  
Where: Washington DC,  
United States of America  
Enquiries: Annual Conference Staff  
Email: confinfo@cof.org

##### Association Charitable Foundations, London

When: 23 - 25 June, 1998  
Where: Bradford, England  
Enquiries: A.C.F. London  
Ph: 0011-44-71-404-1338  
Fax: 0011-44-71-831-3881

**Mr. Skip Rhodes,**  
Chairman, Council on  
Foundations, Washington &  
President, Chevron Foundation

**“Corporate  
Philanthropy in a  
private economy.”**

### M E L B O U R N E

Where: 48th Floor,  
101 Collins Street,  
Melbourne, Vic 3000

When: Monday 10 November, 1997  
12.30pm - 2.00pm

### S Y D N E Y

Where: Garvan Research Institute,  
When: Friday 7 November, 1997  
Enquiries: Donna Greaves  
Phone: (02) 9362 3264

Lunch Provided      RSVP: 9650 9255

# Members of Philanthropy Australia Inc.

Estate of the Late George Adams  
George Alexander Foundation  
W.L. Allen Foundry Co. Ltd.,  
AMA (NSW) Charitable Foundation  
Andrews Foundation  
Ansell Ophthalmology Foundation  
Anti-Cancer Council of Victoria  
ANZ Trustees, Melbourne  
Australia Foundation for Culture  
& the Humanities Ltd.  
Australian Multicultural Foundation  
Australian Youth Foundation  
Benevolent Society of NSW  
The Body Shop  
Bokhara Foundation  
Brash Foundation  
Jack Brockhoff Foundation  
William Buckland Foundation  
L.E.W. Carty Charitable Fund  
Clean Up Australia Foundation  
Danks Trust  
Deakin University Foundation  
Education Foundation  
Equity Trustees  
Felton Bequest  
Foundation for Development  
Cooperation Ltd.  
Freehill Hollingdale & Page  
Ern Hartley Foundation  
Invergowrie Foundation  
G.M. & E.J. Jones Foundation  
The Landcare Foundation  
A.L. Lane Foundation  
Law Foundation of New South Wales  
Law Foundation of S.A. Inc.  
Flora & Frank Leith Charitable Trust  
Lord Mayor's Fund  
Lotteries Commission of W.A.  
Macquarie Bank  
Mayne Nickless Ltd.  
Ronald McDonald  
Children's Charities  
H.V. McKay Charitable Trust  
Eve Mahlab  
Miller Foundation  
Monash University  
The Myer Foundation  
Sidney Myer Fund  
National Australia Trustees Limited  
Perpetual Trustees Australia Limited  
Permanent Trustee Company Limited  
Pethard Tarax Charitable Trust  
Ian Potter Foundation  
Queensland Community Foundation  
Queen's Trust for Young Australians  
R.A.C.V. Foundation  
Lance Reichstein Charitable  
Foundation  
Rio Tinto  
R.E. Ross Trust  
Rothschild Australia Ltd.  
Royal Melbourne Institute of  
Technology  
Rusden Foundation  
Sir Albert Sakzewski Foundation  
Helen M. Schutt Trust  
Fleur Spitzer  
State Trustees

## for Grantmakers

Stegley Foundation  
Sunshine Foundation  
Sydney City Mission  
Telematics Trust  
Trust Company of Australia Limited  
The State Library of Victoria Foundation  
R. & J. Uebergang Foundation  
University of Melbourne  
Gualiero Vaccari Foundation  
Victoria University of Technology Foundation  
Victorian Womens Trust Ltd.  
J.B. Were & Son  
WMC (formerly Western Mining Corporation)  
Westpac Banking Corporation  
The Norman Wettenhall Foundation  
Garnett Passe & Rodney Williams Memorial Foundation  
Hugh Williamson Foundation

**Philanthropy Australia** is the umbrella body for major grant making private, family and corporate trusts and foundations in Australia.

Established in 1975 the Association represents the diverse interests of its members to government and the community.

An extensive range of programmes and services are offered to members. Specific activities include:

- A resource library of local and international information
- Regular discussion groups/workshops for members on issues relevant to philanthropic or trust operations
- Assistance to individuals and corporations planning to set up trusts and foundations
- Monitoring legislative activity

## New Members

The Association would like to welcome the following new members:

**Percy Baxter Charitable Trust**

**Sylvia & Charles Viertel Charitable Foundation**

For further information and membership form:

Philanthropy Australia  
3/111 Collins Street  
Phone: (03) 9650 9255  
Fax: (03) 9654 8298  
Email: [pa@philanthropy.org.au](mailto:pa@philanthropy.org.au)

# Other Publications



## AUSTRALIAN DIRECTORY OF PHILANTHROPY

1996-1997 - 8th Edition

**COST - \$45**

Published by Philanthropy Australia Inc, this directory is the most comprehensive reference on sources of non-government funding in Australia

- An exhaustive index of over 300 trusts and foundations,
- Accessible information about trusts, foundations and corporate funds,
- A source of basic data for those working in the sector or other related fields; and
- Comprehensive data for researchers in the field of philanthropy

*The  
Australian  
guide to  
Scholarships  
and Awards*

THE FIRST AUSTRALIAN  
STEP-BY-STEP  
GUIDE TO GIVING  
THROUGH A TRUST  
OR FOUNDATION

A  
GUIDE TO  
INFORMED  
GIVING

## THE AUSTRALIAN GUIDE TO SCHOLARSHIPS & AWARDS 1997-1998

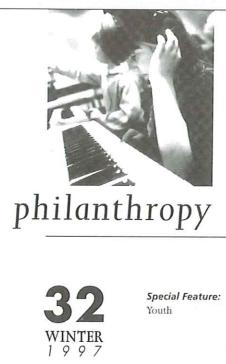
**COST - \$45**

Philanthropy Australia Inc. has published the first extensive guide to scholarships, and awards, available from trusts, foundations and other funding bodies. It includes the arts, overseas study, medical research, education, sport and community organisation. The guide provides a clear and easy way of finding this vital information.

## A GUIDE TO INFORMED GIVING, 1990

**COST - \$50**

The first Australian step-by-step guide to giving through a trust or foundation. A Guide to Informed Giving is a comprehensive, detailed publication about the ways in which philanthropic trusts and foundations work in Australia. Commissioned by Philanthropy Australia, the Guide is an invaluable resource for potential givers, Lawyers, Accountants, Trust and foundation administrators and Community Groups.



## PHILANTHROPY - QUARTERLY JOURNAL

**Annual Subscription - \$40**

Philanthropy has a greater role to play than ever before. As the official Journal of Philanthropy Australia. **Philanthropy** is uniquely placed to highlight what and who trusts are funding. It is a must for those seriously seeking funds for their community activities.

## Workshops

**Want to know more about how to approach  
Trusts and Foundations?**

**How to be an effective grantseeker?**

**How to secure funds for that much needed  
work?**

**This workshop is for you! Topics to be covered:**

- Understanding the grantseeking maze and mapping the territory of Trusts and Foundations
- Who gives what to whom, and why
- Nuts and bolts of a successful funding request
- Artful, effective ways to use your time and contacts
- Trouble shooting and handling the worst case scenario
- How to make your role as a grantseeker work for you in your organisation
- The steps to take in building funding partnerships that work
- Everything you ever wanted to ask.....

Your familiarity with the world of philanthropy will be increased through access to a range of written materials, and face to face discussion with the grantmakers

You will come away more effective as a grantseeker through exchange of information, ideas and consideration of new and old strategies

You will receive practical assistance with the development of your funding proposal, so bring questions and ideas to discuss

The workshop presenters share over 20 years of experience in seeking grants for community organisations, before gaining 18 years experience working with Trusts and Foundations.

*Sydney, 17 November 1997*

*Brisbane, 19 November 1997*

**Dates for 1998 available soon.**

All Workshops run from 9:30 am - 4:30 pm. The cost is \$250 per person including lunch, morning and afternoon tea and materials.

**Places are limited, registration must be accompanied by full payment.**

**Phone: (03) 9650 9255 or Fax: (03) 9654 8298**

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