

A CENTURY
OF MYER
PHILANTHROPY

Spring 1999 (40)

Philanthropy





A CENTURY OF
MYER
PHILANTHROPY



Dafydd Lewis

Special inserts

With this special 40th Edition of *Philanthropy*, members and subscribers receive two historical monographs featuring great Australian philanthropists: Sidney Myer and Dafydd Lewis. These form the first in a series of short histories commissioned by member trusts and foundations. Other philanthropists currently being researched are Hugh D.T. Williamson and William L. Buckland.

To obtain further copies of the monographs please contact
Philanthropy Australia:
p: (03) 9620 0200
e: pa@philanthropy.org.au

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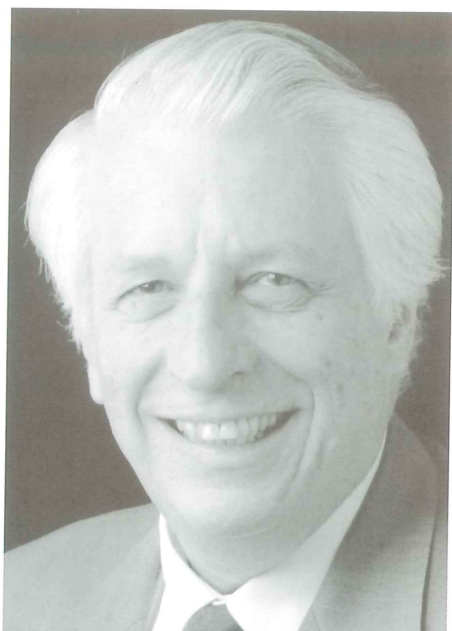
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TRACK THE TRENDS IN
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[FOR CORPORATIONS, FOR TRUSTS
AND FOUNDATIONS, FOR
ACCOUNTANTS, FOR LAWYERS
ANND INVESTORS, FOR
GRANTSEEKERS AND INDIVIDUALS.]

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Patron's words: The changing face of philanthropy

Congratulations to Philanthropy Australia on the 10th Anniversary and the 40th edition of *Philanthropy* journal. This seems an opportune moment to reflect on the changing face of philanthropy in Australia and the very positive role that Philanthropy Australia is playing in shaping this new future.

Forty years in medical research have given me a good perspective from which to view these changes. The clearest and most obvious new trend is that Commonwealth and State Governments are now rarely in a position to fund the totality of some new social initiative. Rather, a pattern is developing where socially valuable goals are being pursued through public sector-private sector partnerships, and the more creative the partnership, the higher the likelihood of a positive outcome. For example, in medical research grants from the National Health and Medical Research Council frequently provide the backbone, a philanthropic contribution may be needed to provide satisfactory infrastructure, extra human resources (particularly younger workers), and industry participation may provide a link to commercialisation of discoveries and final use to the benefit of humanity. The medical research community has attuned itself to this more

complex web of interactions.

Philanthropy Australia is to be congratulated on having been able to persuade the Commonwealth Government to look positively on such partnerships and in particular to encourage extra charitable giving through a better taxation treatment of certain gifts. Quite apart from the value of this change in Government policy as such, the dialogue that has been strengthened between Government, philanthropy and leaders of industry carries further positive benefits. In the educational scene, the desire for Governments to

'One issue that should engage the philanthropic community heavily over the next few years is that of greater social justice for Aboriginal and Torres Strait Islander peoples'

see more such partnerships is more problematic. In higher education, for example, Government grants to universities have gone down by about 20% per equivalent full-time student unit and the difference is supposed to be made up for through fee contributions and private entrepreneurship. I would prefer the entrepreneurship to be encouraged from a platform of higher Government support, because our

education spending is not up to the best international norms and, at ground level, morale in universities leaves much to be desired.

One issue that should engage the philanthropic community heavily over the next few years is that of greater social justice for Aboriginal and Torres Strait Islander peoples. It is highly encouraging to note that some foundations have already embarked on imaginative projects in this area, but much more remains to be done. If we are to reach Reconciliation by the Centenary of Federation, we must have active national strategies in a great many areas, including those of education, health, housing, employment opportunities, infrastructure generally and relations to the justice system.

The Council for Aboriginal Reconciliation is currently working actively to put a suitable framework in place for more decisive national action.

It is an honour and a joy to be the Patron of Philanthropy Australia. May it continue to grow and flourish under its dynamic leadership and may the *Philanthropy* journal go from strength to strength.



Sir Gustav Nossal



From the President

I am delighted to be assuming the Presidency of Philanthropy Australia at such a promising time in its development. There are many reasons to feel optimistic both about this organisation and the growth of philanthropy in Australia.

First, the last three years has witnessed the Association's growth into a leading interest group. Today it has a public profile which reflects the importance of the sector and the gathering momentum of the philanthropic movement

Second, there is a large amount of new wealth being created and a growing respect for philanthropists. There is an expectation that the wealthy should give something back to the community in terms of money, entrepreneurial skills, business acumen and leadership. This expectation is demonstrated by the growing attention that the BRW and other media pay to the philanthropic and community involvement record of the "rich". It is also reflected in the increasing pride displayed by philanthropists. Pride not in their giving but in the outcomes of their giving. Today successful business people are willing to be models rather than remain anonymous.

Third, the fiscal climate is moving from discouragement of philanthropy to encouragement. This movement is illustrated by the Taxation Amendment bill recently introduced into the Federal Parliament. This bill removes some of the present anomalies and disincentives to giving. Furthermore the Prime Minister has indicated that he is open to further reform in the area.

Fourth, there is growing recognition about the need for improvement in the standards of governance, management and accountability of grant giving and grant seeking organisations. The voluntary Code of Conduct currently being developed by Philanthropy Australia's members will help to ensure that performance levels continue to rise and goodwill towards the sector is not undermined by complacency, poor standards of supervision or abuse of privilege.

Fifth, the corporate sector is moving towards acceptance of its social responsibility. Enlightened managements are recognizing that the thoughtful allocation of resources to the community can

involve exciting opportunities for research, new product or systems development, as well as executive development. Community involvement also leads to improvements in staff morale and ultimately better shareholder returns.

Sixth, the philanthropic sector (although still largely undervalued) is becoming more visible and appreciated for the contribution it makes to shaping our society. It is after all the primary source of social venture capital as well as a major font of funds directed towards the alleviation of distress and the elevation of public life through the arts and culture. Moreover the many people working in the sector apply a great deal of thought and effort to issues affecting society.

I look forward to working constructively with Philanthropy Australia's talented Board and its energetic Secretariat not only to meet the needs of our members but also to increase giving and to ensure that the flow of funds to the Not for Profit sectors is as strong, efficient and responsive as possible. 

Eve Mahlab AO



From the Executive Director

It was August 1899 when Sidney Myer first set foot in Australia. In August 1999, the benefits of Sidney Myer's generosity and that of his family are still enjoyed across the community.

As promised, this edition of *Philanthropy* features the Sidney Myer centenary and pays tribute to the enormous contribution made by the Myer family.

Just one example of the impact made by the Myers is in the area of arts and culture. The Sidney Myer Music Bowl and the Malthouse Theatre in Melbourne, where many original Australian works have been performed, are central to a thriving national contemporary culture. Neither would exist without the generous support and vision of the Myer family.

To mark the anniversary of Sidney Myer's arrival, the family has made a \$16 million gift to the community, known as the Sidney Myer Centenary Celebration donation. The gift builds on long standing Myer commitments to the arts, developing links between Australia and the broader Asian region, welfare, the environment, and rural communities.

The gift was made partly in the hope that it would inspire others to contribute to the community and nurture the culture of giving that was encouraged by Sidney Myer. Certainly the Sidney Myer Fund, the Myer Foundation and many individual members of the Myer family have been leaders in the philanthropic sector of this country.

The Australian Association of Philanthropy (as Philanthropy Australia was previously known) came into being largely through the work and commitment of the then Executive Director of the Myer Foundation, Meriel Wilmot.

The Myer Foundation continues to be a staunch member and supporter of Philanthropy Australia. Today, Lady Southey, President of the Myer Foundation, serves as Vice President, and the Myer Foundation is a founding Leading Member of the organisation.

We welcome our other Leading Members – Thomas Foundation, the Ian Potter Foundation, the William Buckland Foundation and the Pratt Foundation - and thank them for their commitment to Philanthropy Australia's role as a strong and vocal advocate for grant-makers and grant-making.

We are pleased that our ongoing role in advocating for tax reform, specifically to remove some of the disincentives to philanthropic giving, has finally resulted in a bill now before the federal parliament to amend the Taxation Act. There will no doubt be much ongoing discussion about the adequacy, the impact and the follow-up to these amendments, and we can assure our members that we will remain at the forefront of that debate.

Finally, it is worth noting that this is the fortieth edition of *Philanthropy*, and we mark this milestone with a small retrospective on the journal and the road the organisation has travelled over the past ten years.

It seems there are a number of significant anniversaries to celebrate in this half of 1999. Perhaps we might borrow from the oft-quoted phrase of another landmark occasion, and say that Sidney Myer's step off the boat was a small step for a young Russian man, but a giant leap for philanthropy. Happy Centenary!



Elizabeth Cham

NEWS AND VIEWS

Philanthropy celebrated at Government House, Canberra

In June, their Excellencies Sir William and Lady Deane hosted a reception to mark the visit to Australia of Mr Rien van Gendt, Executive Director of the Bernard van Leer Foundation. Mr van Gendt visited Australia to celebrate the 50th anniversary of the van Leer Foundation, established by Dutch industrialist and philanthropist Bernard van Leer. The Foundation operates in over 40 countries including Australia.

Info

e: registry@bvleerf.nl
Philanthropy Australia's Resource Centre holds reports from the Bernard van Leer Foundation.

Honours list congratulations

Congratulations to Lady Southey, AM, Chair of the Myer Foundation and Vice President of Philanthropy Australia and to Mrs Louise Gourlay, OAM, Trustee, The William Buckland Foundation, both of whom were mentioned in the Queen's Birthday Honours List.

Welcome to Leading Members

Philanthropy Australia is delighted that five members of the Association have decided to support us in a more significant way by becoming Leading Members. Leading Members pledge \$25,000 a year to the Association for three years, allowing us to plan and fund particular strategic projects. The first Leading Members are: The Thomas Foundation, The Ian Potter Foundation, The Myer Foundation, The William Buckland Foundation and The Pratt Foundation.



Rien van Gendt (left) at the Government House reception with the Governor-General, Sir William Deane.

Vale Lindsay Yeo

It is with great sadness that Philanthropy Australia notes the passing of a great Australian, Mr Lindsay Yeo AO.

Mr Yeo, partner of Marquand & Co., then consultant to Hall Chadwick Chartered Accountants until his death, was an active member of Victorian charitable organisations and trusts for many years.

Mr Yeo was a trustee of both the Pethard Tarax Charitable Trust and the Alexander Miller Memorial Homes. In 1978, after more than a decade as Chairman of the Salvation Army Red Shield Appeal, Mr Yeo was awarded their highest accolade - an 'Order of Distinguished Auxillary Service'.

Amongst many other appointments, he was also the founding Chairman of Melbourne Lifeline and President of the Australian Kidney Foundation from 1972-1984.

The philanthropic sector will miss his enthusiasm and dedication to the wider community.

Tax forum

Members of Philanthropy Australia and representatives of the Trustee Corporations Association attended a special forum on 30 July to receive a briefing on the Federal Government's Taxation Law Amendment bill. John Emerson of Freehill Hollingdale and Page and Graham Reeve of Arthur Andersen provided an overview of the proposed changes. Participants engaged in animated discussion on several points which they wished Philanthropy Australia to raise in regards to the Bill. Members raised concerns that legal disincentives to giving should not be replaced by bureaucratic disincentives, and suggested various actions including a submission to the ATO by interested parties, and research into the benefit to the community of this kind of reform.

Info

● To obtain a copy of Philanthropy Australia's submission please contact our office:
p: (03) 9620 0200
f: (03) 9620 0199

NEWS AND VIEWS

Scholarships for Indigenous students

The Australian Youth Foundation and the Minerals Council of Australia have awarded the first 20 scholarships to young Aboriginal and Torres Strait Islander students under a Minerals Council initiative.

The Minerals Council of Australia has committed \$100,000 each year for the next four years to the program which aims to offer opportunities to young Indigenous students to study, improve their work skills and enhance their employment prospects. The 20 recipients come from New South Wales: Coonamble, Taree, Trangie. Northern Territory: Alice Springs. Queensland: Brisbane, Cairns, Deception Bay, Ipswich, Gympie, Kelso, Mossman, Winton. Tasmania: Hobart. Western Australia: Kardinya, Heathridge, Palmyra.

The program is administered by the Australian Youth Foundation.

Info

Vanessa Liell

p: (02) 9357 2344

f: (02) 9358 5635

e: vanessa.liell@ayf.org.au

● The next issue of *Philanthropy* will feature a story on the AYF.



Recipients of the 1999 Minerals Council Scholarship program for young Indigenous students

Ford Foundation guest speaker for annual Trustees' function

The Contemporary Museum of Art in The Rocks, Sydney is the venue for this year's Trustees' function. To be held on 7 December 1999, the function will be generously hosted by Macquarie Charitable Foundation. Barry Gaberman, Senior Vice President of the Ford Foundation, New York will be the guest speaker.

Winter school on advocacy and social action

The Stegley Foundation recently sponsored a highly successful Winter School on Advocacy and Social Action, in partnership with RMIT and the Victorian Trades Hall Council.

Over three days, 350 community activists came together to develop a range of skills for engaging with issues, techniques and strategies for advocacy and social action in a changing political, cultural and social environment. The program included a wide range of speakers from community, local government, union and university sectors, plus panel discussions, case studies and workshops.

In the words of Stegley trustee, Moira Rayner, the Winter School was "intended to give participants tools to counteract the sense of hopelessness that comes from the consumer focus of modern public life; to begin to satisfy an unmet need for community building and democratic enhancement".

Move for Philanthropy Australia

After more than three years at 111 Collins Street, generously sponsored by The Ian Potter Foundation, Philanthropy Australia has moved to the other end of Collins Street.

Thank you to the ANZ Bank for generously providing and fitting out our new office space pro bono for the next three years.

New premises

Level 10, 530 Collins St, Melbourne 3000 (corner King Street, use the glass lifts from the King St entrance).

New phone and fax numbers

p: (03) 9620 0200

f: (03) 9620 0199

Jane Tewson's first major appearance in Australia

Jane Tewson CBE – the face behind the 'Red Nose' – is coming to Australia at the behest of the Education Foundation. Jane is the inspiration behind charity projects, Comic Relief and Pilotlight.

Jane will be speaking at a lunch on Thursday September 2 1999 from 12pm – 2pm at the Plaza Ballroom, Melbourne. \$65 per person.

Info

For further details contact the Education Foundation:

p: (03) 9650 4277

f: (03) 9650 5443

1999 Human rights awards

Foundations might consider nominating for the 1999 Human Rights Awards. The Awards are an annual event hosted by the Human Rights and Equal Opportunity Commission that recognise those individuals and organisations making a significant contribution towards the promotion and protection of human rights and equal opportunity in Australia. Categories include corporate, community and (a new category this year) the Human Rights Youth Medal.

Previous medal winners have included Dr Faith Bandler, Justice Elizabeth Evatt, the late Rob Riley, Eddie Mabo and Fred Hollows.

Nominations are now open and will close on Friday 26 September 1999.

Info

For further information about the awards and a nomination form:

p: (02) 9284 9675

w: www.hreoc.gov.au/news_info/



Dr Diana Leat returns to Australia on renewed PM funding

As many members will know, Dr Diana Leat, Visiting Professor at the Centre for Voluntary and Not For Profit Management, London, has spent three months with Philanthropy Australia as part of the Prime Minister's Business/Community Partnerships Initiative.

During her time in Australia, Dr Leat conducted an intensive research project on Australian philanthropy, and led seminars and workshops in Victoria, New South Wales and Queensland.

We are delighted that this Initiative will fund Dr Leat to return to Australia to continue her valuable research as our first Philanthropy Fellow.

Creating a Philanthropy Research Network

During her recent visit, Dr Diana Leat convened a meeting to discuss the need and possibility of establishing a Philanthropy Research Network.

Academic interest is growing in the development of philanthropy as an

Diana Leat

emerging social policy issue and in terms of its contribution to the community. Philanthropy Australia is well placed to co-ordinate the Philanthropy Research Network.

Philanthropy Australia has established and will maintain a directory of people and organisations involved in research into philanthropic giving in Australia. This will be publicly available on our website.

Info

For more information on the Philanthropy Research Network contact:

p:(03) 9620 0200

e: pa@philanthropy.org.au

● The next issue of *Philanthropy* will be devoted to research and will be co-edited by Dr Leat.

● Dr Leat's paper 'Trusts and Foundations in Australia' is the first of Philanthropy Australia's *Futures Forum* series, and will be included as a lift-out in a future issue of *Philanthropy*.

NEWS AND VIEWS

Global Cultural Diversity Congress

The Australian Multicultural Foundation is co-hosting the global cultural diversity Congress with The Commission for Racial Equality, to be held in Cardiff, Wales, in March 2000. The Congress aims to stimulate international debate on how social and economic policies can meet the diverse needs of societies and to explore ways to strengthen social cohesion. Major themes of the Congress are: employment and business; health and welfare; education and training; immigration, refugees and citizenship; justice, policing and racial violence; social exclusion, elimination of racial discrimination.

Info

The Secretariat, Global Cultural Diversity Congress 2000, 10/12 Allington Street, London, SW1E 5EH
e: info@gcdc2000.btinternet.com
i: www.btinternet.com/~gcdc2000

Increase in ethical investment

Earthbeat (ABC Radio) has reported an increase in socially and environmentally responsible money management. According to the 12 June edition, socially screened portfolios and ethical investment in the US have grown at a rate of 200% over the past two years, and 50% last year in the UK.

As discussed at the recent Executive Officers' meeting addressed by Simon Longstaff of the St James Ethics Centre, a new book on this topic has been published by the Australian Consumers' Association. Entitled *Ethical Investment*, (ed: Russ Knowles), the book is available through the Resource Centre.

Info

i: www.abc.net.au/rn/science/earth/stories/s32045.htm

Rockefeller and Culpeper merge

In a \$650 million merger, the Rockefeller Brothers Fund of New York City and the Charles E Culpeper Foundation of Stanford, Connecticut will combine operations into Rockefeller Brothers Fund Inc.

The new Fund will continue the major grantmaking programs of both Foundations, supporting programs in health, education, arts and culture, sustainable resource use, world security, the nonprofit sector and early childhood education. The new Fund will sustain the Charles E. Culpeper name through the Charles E. Culpeper Scholarships in Medical Science and the Charles E. Culpeper Biomedical Pilot Initiative.

Soros Foundations in Kosovo

The Newsletter of the Soros Foundations Network reports on its work helping refugees and displaced persons. Rather than contribute humanitarian aid being offered by a host of agencies, the Soros Foundations aim to be a catalyst for projects focussing on the longer term needs of displaced communities. In areas such as education, independent media, strengthening civil society and legal and psychological counselling, the priority has been the empowerment of refugees.

Info

Soros Foundations Network
i: www.soros.org/

National news feature

The Australian, following negotiations with Philanthropy Australia, will publish a special report on corporate philanthropy on August 19. The original 2 page supplement will appear as a six page feature following the extraordinary interest shown by the community.

Info

Members interested in obtaining a copy of the supplement should contact:
p: (03) 9620 0200
after Monday August 23



PHILANTHROPY AUSTRALIA'S RESOURCE CENTRE HOLDS A WIDE RANGE OF BOOKS, JOURNALS, AND REPORTS RELATING TO PHILANTHROPY, GRANTMAKING, GRANTSEEKING AND RELATED AREAS. THE RESOURCE CENTRE MATERIALS ARE AVAILABLE FOR BROWSING BY PHILANTHROPY AUSTRALIA MEMBERS, AS WELL AS MEMBERS OF THE RESOURCE CENTRE.

RESOURCE CENTRE NEWS

Here's a sample of what we've received recently

Publications

Australian Bureau of Statistics:
Australian Social Trends 1999.

Campbell, Colin G. *Telling Our Story: Accountability for Family Foundations.*

Council on Foundations. *Ways to grow: A Study of Community Foundations Serving Populations under 250,000*

Coy, John F. *Integrating Corporate Community Involvement for Added Value: Trends and Case Studies.*

Doven, Roland & Ellis, Fiona. *Fairness in Funding: An Equal Opportunities Guide for Grantmakers.*

Giroud, Cynthia D. *A Guide to Strategic Planning for Corporate Contributions.*

Hedley, Rodney & Rochester, Colin. *Good Grant Making: A Practical Guide.*

Kliger, Beverley. *An Unfair Deal: a consumer audit of the electricity, gas and water industry reforms.* (Part of the Stegley Foundation's Social Policy Action Series.)

Sandilands, Jane. *Dafydd Edward Lewis: A short history of Dafydd Edward Lewis and the Dafydd Lewis Trust.* (This monograph is the first of a series produced jointly by Member Trusts and Foundations

and Philanthropy Australia.)

Journals

Foundation News and Commentary, March/April 1999

'Last 50/Next 50' – celebrating 50 years of the Council on Foundations. (This issue of Foundation News and Commentary includes a timeline of events which have affected US philanthropy over the past 50 years, as well as predictions on the future of philanthropy.)

Other Journals

ACTAF: the newsletter of UK community trusts and foundations, February 1999.

Asia2000 Review, May-June 1999.

Bush Heritage News, Winter 1999.

Children's Protection Society News, Summer 1998/9.

Creating Communities (Melbourne Community Foundation), vol. 1 no. 2, April-June 1999.

Early Childhood Matters, the bulletin of the Bernard Van Leer Foundation, February 1999.

Earthwatch Institute; Australian Bulletin, March 1999.

Ethical Enterprise News, Autumn 1999.

European Cultural Foundation Newsletter, volume XXII, no 2, June 1999.

Footprints (Global March Against Child Labour), March 1999

International Dateline (Council on Foundations), January 1999.

New Zealand Philanthropy, vol. 2 no. 15. April 1999.

Responsible Wealth Update, February 1999.

Social Policy Research Centre Newsletter, no. 72, February 1999.



VCOSS Noticeboard, June 1999.

Vanessa Meachen,
Resource Centre Manager

Need Website Access?

Members who would like to include news and information on Philanthropy Australia's website are welcome to do so. Contact Vanessa Meachen:
p: (03) 9620 0200
e: pa@philanthropy.org.au



A CENTURY OF PHILANTHROPY

The legacy of Sidney Myer's philanthropic genius

WHAT FOLLOWS IS PART OF MICHAEL MYER'S ADDRESS DEALING WITH SIDNEY MYER'S PHILANTHROPIC LEGACY TO THE MYER FAMILY AND DELIVERED AT THE ANNUAL GENERAL MEETING OF PHILANTHROPY AUSTRALIA ON 13TH APRIL 1999



Michael Myer, grandson of Sidney Myer and Immediate Past Chairman, The Sidney and Merlyn Myer Family Council.

Reprinted courtesy of *The Age*.

Picture: Joe Castro.

'There's a quote that captures how Sidney Myer developed the dialectic between his business interests and his philanthropic interests during the first three decades of this century. It's from 18th century Jewish philosopher, Nachman of Bratislav. It is:

"A man's desire for profit should be prompted from the desire to give charity."

I think that wonderfully sums up the ethic of Jewish philanthropy.

'What were the hallmarks of his philanthropy? His philanthropy was compassionate. He genuinely felt from his heart and cared for people. It wasn't a ruse, it wasn't a way of promoting his business. In Jewish philosophy they say the best philanthropy is the philanthropy that no-one knows about.

'He also understood that there was a need for public philanthropy, because there was a need for a role model.

'Sidney was very practical and liked the hands-on stuff. Philanthropy is not just writing a cheque, it's actually getting your hands dirty.'

'Secondly, he was a visionary. The good philanthropist is like the good venture capitalist, coming up with new ideas and implementing them. During the Depression, he said we needed to create work, so he created the Boulevard project because

people needed to be fed. He inspired the formation of the Melbourne Symphony Orchestra through a major grant to the University of Melbourne.

'He was very practical and liked the hands-on stuff. Philanthropy is not just writing a cheque, it's actually getting your hands dirty. It's doing the real work. And just as in the business sense he was innovative, so he was in his philanthropy.

'What was the scope and impact of his philanthropy? During his lifetime, Stella Barber who recently completed her manuscript "Sidney Myer: A Life, A Legacy" calculates that publicly he gave about one million pounds. If you compound that over seventy years at about six percent that's the equivalent of \$80 million in current dollars. I guess that he probably gave the same amount that is not on the public record. If you compare that against the size of his estate at the time of his death his public and non-public benefactions were a very significant proportion of his net worth.

'I think the most important thing was that during his lifetime, he was recognised as a model for civic involvement and engagement.

'Since his death, his most enduring legacy is that he has inspired a commitment to philanthropy in his heirs and descendants. His example has encouraged philanthropy as an active way of life for the Myer family. Immediately after his death,

"A man's desire for profit should be prompted from the desire to give charity." Nachman of Bratislav

his legacy was continued on by Merlyn throughout the late 30's, 40's and into the 50's. Specifically, in his will he left 12 percent of all his assets and all his income to benefit the community in which he made his wealth. Merlyn was very close and very integral to that process with the original trustees of the Sidney Myer Fund.

'In the 50s - I think Sidney and Merlyn passed the desire to their children, in Bails, Ken, Marigold and Neilma, to build on that tradition - the Myer Foundation was founded. Ken and Bails had the urge to do something that could be innovative, could be original, could reflect their own individual thinking. The Myer Foundation today continues and all the grandchildren, many of the great grandchildren and the spouses are now actively involved in the philanthropy of the Sidney Myer Fund and The Myer Foundation.

'Philanthropy is activist. It's reformist. Philanthropy is the venture capital of the non-profit sector. It should create change. It should create civic engagement.'

'In crude dollar terms, the Fund and the Foundation have given away in excess of \$100 million since Sidney's death - and they were the donations made public. I couldn't guess at what has been given away privately, off the public record.

'I think that among the lessons to be learnt from his tradition of

philanthropy is the importance of being an example. You've got to be out there. You've got to be doing it to create an impact. Philanthropy is activist. It's reformist. Philanthropy is the venture capital of the non-profit sector. It should create change. It should create civic engagement.

'Another lesson to be learnt, and I think this is significant in the light of the current discussion in government circles with Philanthropy Australia, is the implied contract Sidney Myer pointed to between making a profit and civic involvement. It's not good enough to say "I'm just making a profit". You've got to put it back into the community because you made the profit from the community. You can't walk away from that fact.

'And finally, I think the lesson to be learnt, and it's certainly true in our family, is that philanthropy can be a powerful glue that helps hold a wealthy family, or any family,

together. The process of giving is a creative one, a challenging one, an enlightening one and a very rewarding one, emotionally and spiritually.

'What is the relevance of these lessons today? I think they are significant. I think that philanthropy is undergoing a major sea change in this country. I think the changes in the next five to ten years are going to be far larger than anyone imagines because of the simple fact that in the next ten to twenty years there will be the single biggest inter-generational transfer of wealth in history. In the US they estimate that it will be something in the order of twenty trillion US dollars, and conservatively in this country it will be something in the order of 500 billion dollars. For example, Warren Buffet and Bill Gates say they are going to give away their two fortunes, which today would be about \$200 billion US. When you think that the biggest single foundation in the

A BRIEF HISTORY OF
SIDNEY MYER'S LIFE IS
INCLUDED IN 'A CENTURY
OF MYER PHILANTHROPY:
THE OPENING CHAPTER'
INCLUDED WITH THIS ISSUE
OF PHILANTHROPY



A CENTURY OF
PHILANTHROPY



Ben Bodna (left), Philanthropy Australia's Immediate Past President, and Michael Myer at Melbourne Town Hall. Reprinted courtesy of *The Age*. Picture: Joe Castro.



world today has assets of \$10 billion, you have some idea of the order of magnitude of what that will mean for philanthropy on a world-wide basis.

You might be born with a silver spoon in your mouth, but you're not born with the knowledge of how to use it wisely.

'Whether it is someone inheriting a house worth \$250,000 or people who are members of very wealthy families inheriting a lot of money, if people followed Sidney Myer's example and reserved ten per cent for philanthropy, you would be talking somewhere around \$50 billion which could go towards philanthropic activities in the next twenty years in this country.

'The moral and social challenges associated with this change are enormous because a lot of people are very unprepared for inheriting large amounts of money and knowing how to manage it, let alone knowing how to give it away. It is not

something you are born with. It is a learned process. And it also begs the question, how do you motivate people who are going to be in this position, to want to give in the first place?

'Or do you think that it's not worth trying? I would suggest that it is. All of this points to the fact that there are enormous challenges for Philanthropy Australia, to become a very powerful change agent in this process and to continue to urge policy reforms to aid the growth of philanthropy.

'I would also urge that given the fact that there will be increasing amounts of money to be given away that there should be the development of tertiary programs to train the next generation of executives in foundations as well as family members in the process of philanthropy. You might be born with a silver spoon in your mouth, but you're not born with the knowledge of how to use it wisely.

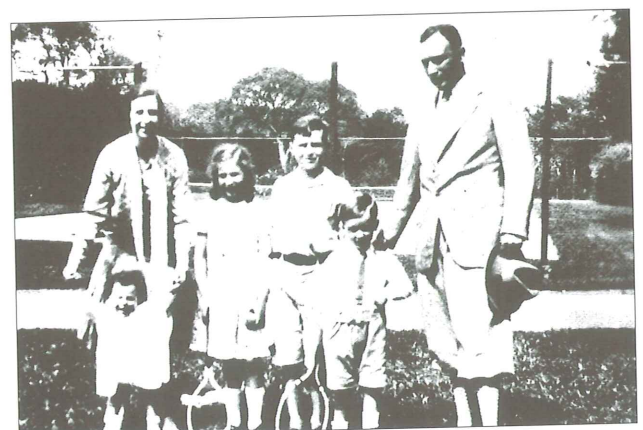
'I think it is also important that there should be more community foundations because there are people who might inherit a lesser amount of money who clearly can't employ executives or staff full time, but may want to contribute and collectively pool that money so it can become effective.

'Finally, there should be encouragement for the highest possible standards for the management of financial assets by the philanthropic sector. I also find the American idea that to retain your charitable status you have to give away five percent of the corpus every year – not just the income – appealing. I really like this principle because it encourages trustees to be good managers and if they're not, at least you know that the capital is going out and working. I'm never of the view that you should only give away the income.

'In conclusion, philanthropy, I think, needs to be made a fundamental part, an intrinsic part, of the Australian way of life. For too long, we've looked to government to solve our social problems which I think creative partnerships between individuals, corporations and the non-profit sector often can more effectively solve. I think we need to learn from the example of people like Sidney Myer and I know that Philanthropy Australia is making a real effort to promote the stories of people like him and get them out so that people understand the example. We need to train the next generation of philanthropists, and in all of this I think that Philanthropy Australia can be an important agent of change.'



Mr Carrillo Gantner, Lady Southey and Mr Baillieu Myer in front of a portrait of Sidney Myer. Picture: Peter Braig.



The Myer family at Sorrento in 1929: from left, Merlyn, Marigold, Nelima, Kenneth, Sidney Baillieu and Sidney. Reprinted with permission (*Sydney Myer*, by Ambrose Pratt).



CHARLES LANE HAS RECENTLY TAKEN UP THE APPOINTMENT OF CHIEF EXECUTIVE OFFICER OF THE MYER FOUNDATION. A SOCIAL SCIENTIST, RESEARCHER, CONSERVATIONIST, SELF-CONFESSED ACTIVIST AND CAMPAIGNER AND OCCASIONALLY LABELLED 'TROUBLEMAKER', LANE SEES PHILANTHROPY AS A WAY TO MOVE MOUNTAINS. HE SPOKE TO JANE SANDILANDS IN MELBOURNE

Future Tense

Charles Lane is unashamedly delighted with his new post at The Myer Foundation, not least because it offers a role reversal of much of his professional life. "In the past, when I've seen something that needs changing, I've always had to articulate it, write up a proposal, raise the funds to implement it, and report on it – I've always been the one applying for support."

Now, he says, it is a source of pleasure and excitement to have access to the means at his disposal through The Myer Foundation to do "what needs to be done" and apply those means to the things that are important.

"The issues that concern me can be found anywhere: in families and at an international level. They are inequity, injustice, disrespect, exploitation and oppression – all are universal."

Australian-born, Lane has spent most of his adult life abroad, in Africa and in England where most recently, with his wife Jane Tewson, he became one of the founding Directors of the small and energetic

British charity, Pilotlight. But the issues that interest him are not the province of one particular country. "The issues that concern me can be found anywhere: in families and at an international level. They are

"With the Foundation well positioned in this period of change, it's clear the family is seeking new directions. I believe they do want to take the opportunity of the next century to make sure they are touching the issues of a changing time and applying their resources to the greatest effect for good."

inequity, injustice, disrespect, exploitation and oppression – all are universal." Lane's 20 years in Africa shaped his passion to fight the dispossession of indigenous people from their traditional lands and one of his projects through Pilotlight formed links between African herders and Aboriginal Australians, an ongoing project supported by The Myer Foundation.

Lane is very aware of the significance of the timing of his appointment. "It's interesting that the Sidney Myer Centenary

Celebration, the end of the old millennium and the eve of the new, the centenary of Federation and the referendum to decide if Australia will become a republic all take place within the next two years. With the Foundation well positioned in this period of change, it's clear the family is seeking new directions. I believe they do want to take the opportunity of the next century to make sure they are touching the issues of a changing time and applying their resources to the greatest effect for good."

Already involved in reviewing policy in the various interest areas of the Foundation, (Arts, Beyond Australia, Science & Welfare) Lane acknowledges it will be a "long and slow process" but one he embraces with enthusiasm. Part of this enthusiasm is generated by working with a Foundation unusual because its members are descendants of the founders, some of the founders are still alive and their issue is actively involved. "This distinguishes it from others and gives the Foundation extraordinary strength, personal commitment and diversity for us to build on."



"As well as the Myer family bringing their personal energy and impetus to the running of the Foundation, they also bring expertise with a number being specialists in certain fields. I'm very much aware that in this role, I need to spend a great deal of time making sure our communications are working properly," Lane said. As well as attending board and committee meetings, Lane has already taken part in some "hands on" work with the family, helping build a house at

Australian philanthropy is very advanced in some ways, certainly in its intellectual framework, but it's still a small pie and there are major impediments to really effective social change."

Bendigo for Habitat for Humanity and meeting Kosavar refugees at Puckapunyal, Victoria.

A significant aspect of his work will be with what the Myer family refers to as the "4Gs" – those fourth generation family members who are now coming to an age where they are engaging with the Foundation. "What the family hopes to achieve is that more of them become interested in philanthropy so that the tradition and momentum of the Foundation isn't lost as older members back off for one reason or another. I'm thinking of events already in which I can involve them and members who are younger, sometimes, to join."

His commitment with these younger members, Lane says, is to



From left: the Hon. John Anderson, Minister for Transport and Regional Services, Mr Baillieu Myer, and Mr Meriweather Jones, Executive Director of the Aspen Institute's Rural Economic Policy Program, brought to Melbourne by the Sidney Myer Fund to assist with their National Foundation for Rural Communities.

"engage by exciting them, touching their conscience, illustrating that privilege and responsibility go hand in hand and also convincing them how fantastically rewarding and enduring it is to be philanthropic".

Lane finds it fascinating to be in Australia at a time when the Federal Government is actively endorsing and promoting co-operation at the philanthropic, corporate and government levels. "I feel that here I can probably bring some of my experience with Pilotlight which was very good at harnessing those three areas. Australian philanthropy is very advanced in some ways, certainly in its intellectual framework, but it's still a small pie and there are major impediments to really effective social change."

England, he says, has its own problems, including the legacy of the Victorian age and the paternal and establishment underpinnings to charity. "We have to link the exciting things in both countries and see what the mix will bring."

As to what he believes The Myer Foundation expects from its new Chief Executive Officer, Lane says:

"They've appointed someone who will not sit idle, they're looking for good governance and I'll give them that – but more, they've appointed somebody who tries to get to the truth of things, and if he finds things that aren't right, wants to change them."





Mr Baillieu Myer launches the Sidney Myer Centenary Celebration Grants.



The Sidney Myer centenary celebration grants

To celebrate Sidney Myer's life and recognise the centenary marking his arrival in Australia, the direct descendants of Sidney and Merlyn Myer have initiated a major giving program to the Australian community totalling over \$16 million. These will be granted to a diverse range of national and regional projects covering aged care; children and youth; unemployment; the arts; science and the environment; rural community development and Australian/Asian affairs.

The projects will be funded over a period of four years from 1999 to 2003. They include:

\$3 million to the Sidney Myer Music Bowl for structural and aesthetic improvements as part of an \$18.5 million refurbishment;

\$2 million to accommodate Asialink and its programs in education, public affairs and culture in a new Melbourne Asia Centre at the University of Melbourne;

\$1 million for the Brotherhood of St Lawrence to provide new accommodation for disadvantaged elderly people in Melbourne;

\$2 million to the Queensland Art Gallery in Brisbane to house and expand The Kenneth and Yasuko Myer Collection of Contemporary Asian Art;

\$1 million for a joint venture with the Australian Youth Foundation for a national Youth Employment initiative;

\$1 million to CSIRO for "The Nature and Value of Australia's Ecosystem Services";

\$1 million to develop two creative play spaces for children, one in the Courtyard of Museum Victoria Children's Museum and the other at the new City of Melbourne's Riverside Park;

\$1 million to the development of a National Foundation for Rural Communities;

\$1 million to a new Youth Housing Initiative in a collaboration between the City of Melbourne, The Myer Foundation and The Salvation Army.

\$0.5 million to the development of a new National Institute of Circus, in

conjunction with Swinburne Institute of Technology;

\$0.5 million to the development of the Malthouse Plaza as a landmark contemporary cultural precinct;

\$200,000 to the Australian Chamber Orchestra towards a project to directly benefit musicians, the Company and their audiences;

\$200,000 to the Lort Smith Animal Hospital towards the rebuilding of their hospital;

\$100,000 towards Melbourne Zoo's project to build a new world class enclosure for Asian elephants;

\$0.5 million to the National Gallery of Victoria towards establishment of the Asian Galleries.

"It is to be hoped that one important outcome of the Sidney Myer Centenary Celebration will be an increased number of Australian businesses and individuals adding their support to these projects and other philanthropic initiatives throughout the community," said Mr Baillieu Myer, A.C., Chairman of Trustees of The Sidney Myer Fund. He added that the family believes the act of giving through individual and business philanthropy should be recognised as part of citizenship and nurtured in Australia as a natural extension of community and civic involvement.





FUNDED BY THE
COMMONWEALTH'S BUSINESS AND
COMMUNITY PARTNERSHIPS
INITIATIVE, THROUGH THE
DEPARTMENT OF FAMILY AND
COMMUNITY SERVICES, THE
INTERNATIONAL SPEAKERS
PROGRAM PROVIDED EXAMPLES OF
WAYS IN WHICH THOSE OVERSEAS
HAVE FORMED PARTNERSHIPS
BETWEEN BUSINESSES AND
NON-PROFIT ORGANISATIONS

The International Speakers' Program

The Prime Minister's call for deeper business involvement in the community as the next step towards creating a stronger Australia has sparked a lively and ongoing debate throughout the business, community and philanthropic sectors.

From October 1998 to the middle of this year, international speakers contributed to this debate. Hosted by Philanthropy Australia and funded through the Prime Minister's Business and Community Partnerships Initiative, seven international leaders from the corporate and philanthropic sectors travelled Australia (including major capital cities, some regional centres and rural areas) highlighting the value of partnership (see box). The stage was shared by exemplary Australian partnerships, indicating the development of a uniquely Australian approach.

Major Themes

- The Canadian philanthropic sector in partnership with the business sector

Over a decade ago, the Canadian Centre for Corporate Philanthropy which represents grantmakers and not-for-profit organisations, identified the need to increase corporate giving. Called Imagine, the corporate campaign promoted the concept of a 'Caring Company'. Patrick Johnston, President and Chief Executive of the Centre, talked about the two commitments required to become an Imagine Caring Company: the company agreed to donate to charitable and non-profit organisations a minimum of 1% of pre-tax domestic profits averaged over a three year period; and the company agreed to encourage employee volunteerism.

Between 1980 and 1987, Canadian corporations donated an average of

0.65% of their pre-tax domestic profits. In the post Imagine period, 1988-1995, this percentage increased to 0.96%. In absolute dollars, this represents almost \$1 billion in additional corporate giving post-Imagine compared to the rate of corporate giving prior to 1988. This has resulted in a second phase of Imagine.

- Corporate philanthropy: part of normal U.S. business practice

Skip Rhodes, Manager of Contributions and Programs for multinational resource giant, Chevron Corporation, described corporate giving as a strategic asset to the success of the business.

He called it an investment from which you are going to get a rate of return rather than giving away money. There's also a competitive benefit. If you're doing your job right and other companies who compete in your marketplace are not doing it, you can gain competitive advantage, he said.

As in Australia, the United States community and government argue that large companies should be involved in the community. Businesses are seen to have a social responsibility in the communities in which they operate.

Aims of the International Speakers' Program:

- To highlight the value of business and community partnerships drawing on both international and Australian experiences.
- To showcase and document Australian best practice in corporate giving.
- To provide a forum for information exchange about respective needs of both business and community organisations.
- To provide tools to both corporations and not-for-profit community organisations to assist them to develop new partnerships.



International speakers (from left) Patrick Johnston and Skip Rhodes

For Chevron, corporate philanthropy: enhances the company's image. The drivers are meeting recognised community needs, enhancing the company's reputation within the communities in which it operates, and enhancing employee commitment; improves the quality of life within the community; influences legislative and other opinion makers who have an impact on the company's operating environment.

The Dayton Hudson Experience

Dayton Hudson Corporation, a major American manufacturing and retail company has been giving 5% of federally taxable income since 1946. Christine Park, a Director, was another powerful advocate for companies to be actively involved in corporate philanthropy. She also highlighted the importance of the partnership between non-profits and business.

Economic and Community Development: the New Order

J. Mac Holladay, CEO of Market Street Services Inc. highlighted the opportunities that economic and community development provide for governments, business and communities to form new partnerships in order to find new solutions to local and regional problems; and the importance of understanding that economic development must be viewed in a

global context with particular emphasis on the new infrastructure of technology and telecommunications. His long background in working at senior levels in five south-eastern States in the US gave him a wealth of practical experience to draw on in his presentations.

● The United Kingdom: Reviewing roles

Dr Diana Leat, Visiting Professor at the Centre for Voluntary and Not for Profit Management, London, highlighted the government trends driving business and community partnerships in the United Kingdom. These new approaches are: an emphasis on mutuality - mutual rights and mutual duties; new deals which bring new approaches to old problems and an announcement of new relationships between sectors; an emphasis on finding more effective and efficient solutions to social problems by focusing less on competition and more on partnerships and integrated, non-duplicative, people-friendly service provision.

In examining these developing relationships, Dr Leat put a new slant on the idea that that corporate philanthropy is good for business. She spoke about the direct and indirect financial benefits that accrue to the business through their

(continued overleaf)

International Speakers

Patrick Johnston

Président and CEO
Canadian Centre for
Philanthropy
6-10 November 1998

Skip Rhodes

Manager, Corporate
Contributions and Programs
Chevron Corporation
23-27 November 1998

Carol Barbeito

Management Consultant and
Trainer
13 November 1998

J. Mac Holladay

CEO
Market Street Services Inc.
28 February - 13 March 1999

Frances Hesselbein

President & CEO
Peter F. Drucker Foundation for
Non Profit Management
12-16 April 1999

Christine Park

Director
Dayton Hudson Foundation,
USA
22-26 March 1999

Dr Diana Leat

Visiting Professor
Centre for Voluntary and Not
for Profit Management, London
Consultant to the Joseph
Rowntree Foundation, UK
April - June 1999



'GETTING COMMERCIAL ABOUT BEING CHARITABLE: BUSINESS AND COMMUNITY PARTNERSHIPS' BY JEAN ELDER AND KAY MEADOWS, IS A FORTHCOMING PHILANTHROPY AUSTRALIA PUBLICATION ON THE INTERNATIONAL SPEAKERS' PROGRAM

transfers to the not-for-profit sector. These include increased purchasing power, market creation and expansion, and the provision of soft infrastructure such as research and other support services.

- **The role of leadership and good management practice in successful partnerships**

American consultant Carol Barbeito, and Dr Frances Hesselbein of the Peter F. Drucker Foundation for Non-profit Management ran a number of workshops on these themes. Ms Hesselbein's visit was part of the plan to establish an Australian Forum on Nonprofit Management to focus on excellence in nonprofit management and partnerships between nonprofits, business and government. Dr Leat

also conducted a number of seminars on the questions posed by UK grantmakers on their grantmaking processes.

Conclusion

These international speakers generated significant media comment and provoked lively discussion in a range of forums. They also successfully reached out to some new audiences in both cities and rural Australia. The contributions of the Australian partnerships mirrored the broad trends that are occurring overseas. Clearly, there is considerable interest in furthering business and community partnerships in Australia. However, there remain a number of outstanding issues that need to be considered by all sectors:

What roles can established philanthropic trusts and foundations play in helping shape these new partnerships/coalitions?

Are there, or should there be, clear definitional boundaries around corporate philanthropy, sponsorship and cause-related marketing?

Is there a danger of less-glamorous or less well-known causes being excluded from new forms of funding arrangements?

How should these new multipartite arrangements be structured in terms of roles and responsibilities?

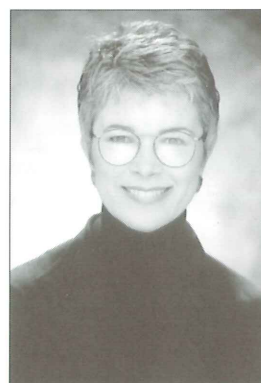
Should there be serious examination of the question "Does it matter as long as it works?"



Jean Elder and Kay Meadows



FROM MINNEAPOLIS, CHRISTINE PARK, DIRECTOR OF THE DAYTON HUDSON FOUNDATION, SPOKE TO SEVERAL AUDIENCES IN SYDNEY AND MELBOURNE



From the Dayton Hudson Foundation

Since 1946, Dayton Hudson has invested 5% of federally taxable income in the communities in which it operates stores. In the 51 years of its operation, it has given \$400 million to a variety of community projects. In 1998, the giving for the three operating divisions and the Dayton Hudson Foundation totalled over \$57 million. Projected giving for 1999 is \$68 million.

The Dayton Hudson Foundation

The Foundation manages contributions in the Minneapolis/St Paul metropolitan area. Its giving is focussed on a 40/40/20 model: 40% of contributions support non-profit organisations dedicated to social action and 40% of contributions support professional non-profit arts organisations in all disciplines. The further 20% of contributions support programs and projects that respond to special community needs and opportunities and to innovative

partnerships with other local community leadership. Limited national support goes to select national service organisations that complement other Dayton Hudson giving by serving local arts or social action programs, or that promote philanthropy.

Making the Store a Hero

Dayton Hudson has three operating divisions and the giving of each is in line with its consumer profile. Each operating division has its own "personality". Grantmaking begins **before** stores are open by building

10 Reasons Why Corporate Community Involvement Makes Sense

The Dayton Hudson Corporation and Foundation give:

1. Because it's the right thing to do;
 2. It builds strong communities and strong communities help business;
 3. It creates customer loyalty;
 4. Attracts and retains employees who ask "what are you doing in the marketplace?"
 5. Helps meet business goals;
 6. It's expected;
 7. It builds a reserve of goodwill;
 8. It can impact on public policy through educating public officials;
 9. Helps the company attract shareholders;
 10. Keeps a company and its people in touch with the community.
-

relationships with key stakeholders and with the promise of being a "good neighbour".

Target

Target Stores (no link to the Australian store of the same name) have a presence in 41 states. The stores support families in a number of ways. They give to social action programs, for example those attempting to eliminate or reduce family violence and domestic abuse. Arts grants and education are other significant areas of Target giving.

Dayton's, Marshall Field's and Hudson's

Three stores: Dayton's, Marshall Field's and Hudson's are "upscale"

retailers with stores in several states. They concentrate on grass roots programs including child abuse prevention, youth self-sufficiency (related to creating job opportunities and leadership skills) and education through the arts encouraging youth involvement.

Mervyn's, California

A family-oriented company, Mervyn's has a commitment to being a good neighbour. It partners with local schools, arts and social action organisations and law enforcement agencies to achieve a common goal: improving the quality of life for families, particularly children, in the communities it serves.

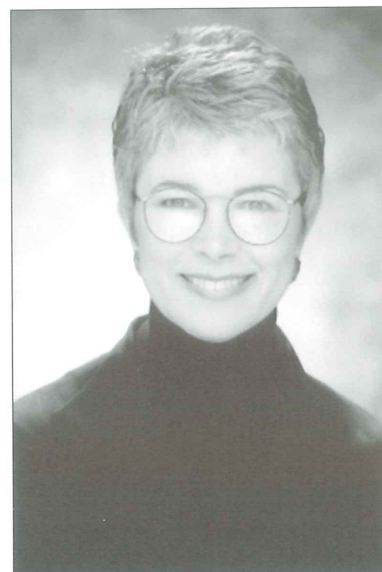
Extra Resources

As well as the grantmaking programs of the stores, a variety of additional resources are mustered for non-profit groups. Among these are:

- Volunteer programs
- Donations of excess products;
- Access to expertise including MAP (Management Assistance Program);
- Excess or outdated equipment;
- Making top level people available for non-profit board membership.

Why Partner with Non-Profits?

In a partnership arrangement, corporations can build capacity of non-profit organisations and add value well beyond that of simply writing a cheque. Relationships with non-profits can keep corporations "grounded" and aware of the key issues in the communities where they do business.



'HIGHLIGHTING THE BEST OF THE BEST': Christine Park, Director, The Dayton Hudson Foundation

To encourage and celebrate corporate community involvement, The Dayton Hudson Foundation has devised an innovative event, calling for entries from both corporations and non-profit organisations across the United States. They sought nominations of exemplary programs from each to demonstrate the advantages of co-operation between the two and to highlight "the best of the best". Three awards of \$100,000 and three honourable mention awards of \$10,000 each in both the non-profit and corporate categories will be given. A press conference and lunch for the winners at the Cooper Hewitt Museum will be held on September 30.

MEMBERS' FILE

Activities of Philanthropy Australia members across the country

Annual Conference of US Council on Foundations, New Orleans 19-21 April 1999

The Conference was stimulating, thought provoking and challenging. There were over two thousand participants at the conference, including representatives from 1800 foundations. The vast majority of participants were of course American. However, international delegates included people from Mexico, France, The Netherlands, Israel, Indonesia, Taiwan, Japan, and Poland, Kazakhstan and Yugoslavia (all funded by the Soros Foundation). The Australian contingent included representatives of the Pratt Foundation, the Reichstein Foundation, the Australian Youth Foundation, Philanthropy Australia and Queen's Trust.

There was much discussion on the role of the philanthropic sector in influencing public policy, and the push towards greater involvement of Foundations in this area. Much of the discussion in relation to marketing or communicating philanthropy was directed to this aspect. There was also much discussion on the role the philanthropic sector could play in promoting 'the civil society', promoting 'civic participation and civic engagement', and civility in politics. One interesting perspective on tax exemptions was that they were recognition of the role Foundations play in serving the

public good and in helping relieve this burden from government.

An enormous amount of American philanthropic effort is directed to supplementing - or filling - the voids of Government funded programs particularly in the Arts, Health Environment, Education, and Welfare. The American history of governmental activity in these areas is generally far more limited than in Australia - where safety nets have existed for a far greater proportion of the population, and where there has been a concomitantly greater expectation of government to intervene and help out. The more recent history of Australian government withdrawal, especially at the State level, from a range of services suggests that Australian foundations and Trusts need to reconsider their generally unanimous exclusion of 'projects primarily dependent on government funding . . .' and weigh up the merits of the project on an individual basis.

A new growth area for Philanthropy is what the Americans call 'Conversion Foundations.' As community owned services such as community hospitals and visiting nursing services are privatised - converted from not-for-profit to profit-making - the proceeds of the sale are compulsorily directed to a Community Foundation. One hundred and nineteen Foundations have been established in this manner in the last 15 years, three quarters of them originating from hospital sales.

They hold assets of \$13 billion and spend \$2 billion annually in their local community.

The sessions on communicating Philanthropy were very worthwhile. There were three workshops presented by Communication Consultants, with the focus on the challenges involved to communicate.

The Conference ended with a keynote address by Bishop Desmond Tutu - an inspirational speaker who argued that it is not enough to loosen the shackles - we must seek to eliminate them. This was a message I feel can be extrapolated beyond racial issues to include all the important social issues of our time.



Leah Mann
CEO Queen's Trust

The Indigenous Affinity Group and VACCHO meeting on Aboriginal Health

The Indigenous Affinity Group of Philanthropic Australia and VACCHO (Victorian Aboriginal Community Controlled Health Organisation) hosted an extremely informative forum on 'Making a difference in Aboriginal Health,' at the VICHEALTH Boardroom on Friday 21 July, 1999. The crowd of around fifty included representatives from philanthropic trusts and Aboriginal community groups from

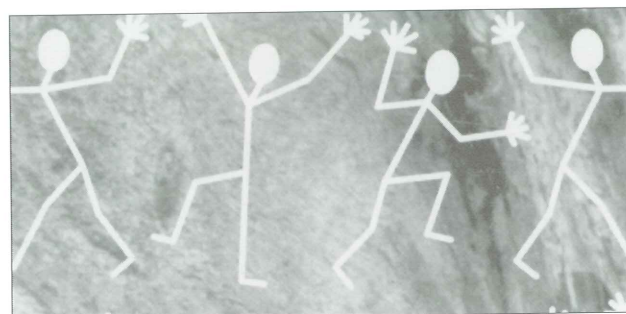
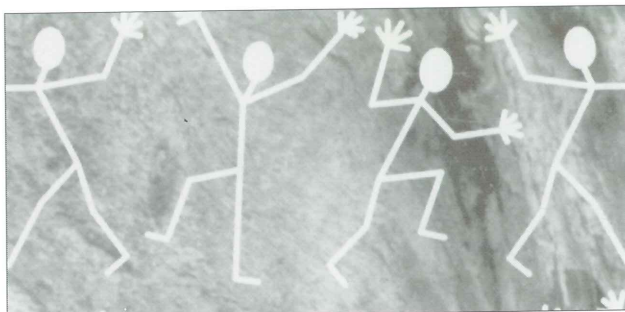


Image from VACCHO's new publication *Where to find that much-needed moola*. Reprinted with permission.

around Victoria. Some of those represented were the Victorian Aboriginal Health Service, the Gunditjamara, Mildura, Echuca, Wathaurong, Swan Hill, Ballarat and Goolum Goolum Aboriginal Co-ops, and the Melbourne Community, Stegley, Ian Potter, Pratt and Lumbu Foundations and well as Rio Tinto, ANZ Trustees and Philanthropy Australia.

Jill Reichstein, on behalf of the Indigenous Affinity Group and Alan Brown, CEO of VACCHO co-chaired the Forum and Lyn McGuinness provided a welcome. Brian Stegley then launched the publication *Where to find that much-needed moola: A guide to philanthropic funding for Victorian Aboriginal community controlled health organisations*.

The strong message from Alan Brown, Dr Ian Anderson and representatives of the Victorian Aboriginal community organisations and co-operatives was that Aboriginal health initiatives have to be controlled and directed by the Aboriginal community. It is the community members who know the problems and can design the most appropriate and successful programs for the health of their communities. The models for such community controlled organisations were the early incarnations of the Aboriginal Health Services in Redfern and Fitzroy. Another related community initiative was a school called Koori Kollij, a training ground for Aboriginal health workers, seed

funded by the Reichstein Foundation in the 1980s. Koori Kollij has since closed, however, its existence points to the importance of having Aboriginal health workers who are skilled and trained in culturally appropriate ways working in both Aboriginal community controlled and mainstream health services. VACCHO is currently developing an Aboriginal Health Worker training program for Victoria.

The importance of an holistic approach to community health was also emphasised. Issues such as high levels of unemployment, battles over native title and the legacy of the stolen generation all have to be regarded as health issues for the community. Paul Briggs from the Rumbalara Football and Netball Club in the Goulburn Valley presented an informative talk on the multifaceted programs and community groups which stem from the Club. His straightforward description of the problems facing the Club and the Aboriginal community, stemming from the history of dispossession and racism, provided a strong picture of the realities of life for the community.

Dr Ian Anderson, one of Australia's first Koori doctors and Associate Professor on Aboriginal health at the University of Melbourne's Centre for Health in Society, demonstrated that despite the reportage around what sounds like significant funding to Aboriginal health programs, levels of funding fall short of need. In a

number of key program areas, such as primary health care, significant under funding occurs, with Aboriginal people actually receiving less government funding than non-Aboriginal Australians in this area. Australia's investment in the health of the indigenous population has been slower in developing than that of New Zealand, Canada and the United States. The relative failure of improvement in health amongst Aboriginal communities here illustrates the effects of this neglect. Aboriginal communities experience three times the instance of serious diseases and a life expectancy of twenty years less than the rest of the Australian population.

There was a strong sense that the processes and bureaucracies for securing often haphazard, proscriptive or non-existent funding on the local, state and federal levels absorbs a lot of energy within community organisations. Although the participants agreed that governments have an abiding obligation to invest in Aboriginal health, some discussion centered around the need to make philanthropic grant application processes more accessible to Aboriginal organisations. This would involve developing closer contact and relationships of mutual trust, a process it is hoped is already underway.



Clare Land
Philanthropy Australia

MEMBERS' FILE

Activities of Philanthropy Australia members across the country

50th Anniversary of Percy Baxter Charitable Trust

Over the past 50 years, the Percy Baxter Charitable Trust has made donations to a broad range of causes. Because of the increasing pressure on services to poorer people and the widening gap between rich and poor, the Trust has focussed its donations to institutions assisting the poor, the old and the disabled and to medical research.

The Baxter family has a strong commitment to equality. Mr J Russell Baxter, son of Trust founder Mr John Percy Hamilton Baxter said: "Our family feels that, in a modern democratic society such as Australia, the ancient idea of people passing down large sums of money to descendants to permit them to live in luxury without working is fundamentally obnoxious. Having now reached our sixth generation in Australia, we do not believe it should be part of the 20th – or 21st century Australian way of life."

Info:

Details about both the Percy Baxter Charitable Trust and Baxter Perpetual Charitable Trust are available from:

Senior Trust Officer, Perpetual Trustees Australia Ltd., 39 Hunter Street, Sydney, NSW 2000.

THERE ARE TWO BAXTER TRUSTS: THE SYDNEY BASED BAXTER PERPETUAL CHARITABLE TRUST AND THE MELBOURNE TRUST: THE PERCY BAXTER CHARITABLE TRUST CURRENTLY CELEBRATING ITS 50TH YEAR

The Baxter way of Giving

- In a family charitable trust, involve children at an age where they can become educated in the giving process;
- Allow grandchildren to attend meetings as observers;
- Look at the changing needs of society and direct giving towards those needs;
- Preserve Australia as one of the best places in the world to live by

The Percy Baxter Charitable Trust

Set up in 1949 by Mr John Percy Hamilton Baxter, the only son of John Francis Baxter and Isabella Baxter (nee Hamilton) who both lived in Geelong from the 1850s to the 1940s.

Percy Baxter worked initially in his father's timber and construction business, then in real estate, retiring in the late 1920s. By the time of the Second World War he was director of a number of local companies including Chairman of the Geelong Gas Company, Federal Woollen Mills and the Regent Theatre. He also had a substantial interest in Fosseys Pty Ltd with Mr Everest York Seymour.

Percy Baxter was active in the Geelong branch of the War Funds Board during the Second World War and gradually became more active in local charitable work including being an active member of the Geelong Rotary Club.

He formed the Trust in 1949 and on his sudden death in 1954, its funds were increased substantially and it has grown considerably over the past 45 years as the stock market has ballooned. His only son, John Russell Baxter, an aeronautical engineer, took an interest in the affairs of the Trust after his death and remains involved today with his sons, Dr John Baxter, research engineer and Roger Baxter, mechanical engineer who are now both Trustees.



Sony Foundation Australia Trustee Ltd

What is the Sony Foundation?

Sony Foundation's mission is "To capitalise on the unique qualities of Sony and to contribute to the advancement of the Australian community by assisting its youth and fostering their talents".

- The Sony Foundation is a non-profit charitable organisation established by the Sony group and representing all Sony companies in Australia, including Sony Australia Limited, Sony Music Entertainment, Sony Computer Entertainment and Columbia TriStar.

- It is registered under the Charitable Fundraising Act of 1991.
- It will cohesively integrate technology, film and music initiatives to uniquely benefit the development Australia's youth.

Administration expenses are fully met by the Sony group, meaning that every dollar donated to the Sony Foundation is then given directly to worthwhile causes.

What will it do?

The Sony Foundation will

- donate funds, goods and services to assist Australians the less than 25 years of age, including: those from disadvantaged backgrounds, gifted and talented individuals; and
- raise funds from corporations and individuals

Who will it support?

Major Youth Investment

Each year the Sony Foundation will support a major charity. The partnership will involve a substantial cash donation supplemented by resources from each company to assist the charity in its work.

The inaugural Major Youth Investment is CanTeen which since 1985, has been supporting, developing and empowering young people living with cancer, both patients and siblings. Australia-wide, CanTeen provides a peer support network, recreational and educational opportunities for sharing experiences and having fun with other young people who have 'been there, done that'.

Youth Investment

The Sony Foundation Youth Investment will be a smaller grass roots project with the potential to grow. The inaugural Youth Investment is the Ignatian Children's Holiday Camp, an unusual project where, for one weekend of their school holidays, students from St Ignatius College 'adopt' a mentally or physically handicapped child into their care. The Sony Foundation's contribution to the project will enhance the quality of the weekend for both students and children.

Sony Foundation Youth Scholarship Program

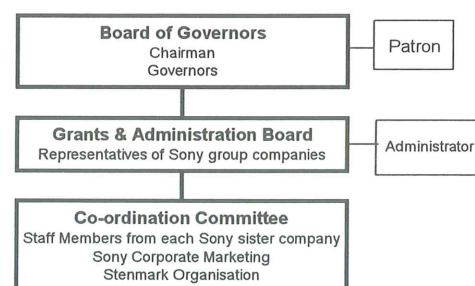
The Sony Foundation Youth Scholarship Program will reward excellence and achievement by Young Australians in the following areas:

- Sony Foundation Youth Script Writing Award
- Sony Foundation Youth Technology & Science Award
- Sony Foundation Youth

Interactive Award

- Sony Foundation Youth Song Writing Award

How is the Sony Foundation structured?



Board of Governors

The Sony Foundation Board is composed of the following members:

- Rod McGeogh - Chairman
- Janet Holmes a Court
- Dennis Lillee
- Steve Vizard
- David Smorgan
- Mr Haruyuki Machida - Managing Director, Sony Australia Ltd
- Mr Denis Handlin - Chairman and Chief Executive Officer, Sony Music
- Mr Michael Ephraim - Managing Director, Sony Computer Entertainment

The Patron of the Sony Foundation is John Laws.

Further information:

Anne Brooks, Administrator, Sony Foundation (C/- The Stenmark Organisation)
p: 02) 9955 1822
f: 02) 9956 8130
e: anne.brooks@stenmark.com.au



MEMBERS' FILE

ANZ Staff Foundation

The ANZ Staff Foundation is a perpetual charitable trust aimed at building permanent funds to meet the needs of charities in Australia. Priority is given to projects in which ANZ staff are to can be involved as volunteers.



The Foundation, supported by ANZ and its staff, has made grants to the following:

\$6,800 to the Australian National Committee of Refugee Women, NSW, to provide funding for three seminars in financial management for women from refugee and non-English speaking backgrounds.

\$5,000 to the Bethany Family Support Inc, Vic, to train five volunteers in a 12 week program to enable them to deal with issues including domestic violence, substance abuse and financial difficulties.

\$5,000 to Camp Quality Victoria, to support the Victorian National Day of Hope, an event aimed at giving hope to those affected by cancer and families and raising community awareness.

\$15,168 to Devonfield Enterprises Inc. Tas, to fund two education programs for residential intellectually disabled children up to 18 years old in the areas of communication and sexuality/sexual health.

\$4,800 to Fusion Australia, Qld, for a monthly adventure activity for 50 people 'at risk.'

\$15,000 to LEPSH Inc, SA, a challenge grant to fund the building of a shed for training expansion and work programs for intellectually disabled workers.

\$18,000 to Mandurah Joblink Inc, WA, to fund a series of information sessions and workshops to assist unemployed people to focus on job seeking.

\$5,500 to Open House Victoria, to assist with running an educational program helping young people overcome negative attitudes and build self-esteem and confidence to assist their reintegration into schools and families. This project will involve a number of schools.

\$20,000 to Wimmera Community Care Victoria, to fund the appointment of a co-ordinator to develop and implement a strategic plan for the running of 'Awakening Performing Arts Festival' featuring disabled artists from all states.

\$15,000 to Youth at Risk Inc. Victoria, for a series of training programs to help young people acquire job search and job retention tools.

For further information contact Frank Mazzeo on (03) 9273 4492

State Trustees

State Trustees provides an extensive range of trustee, executor and financial administration products and services in Victoria. One such service to both philanthropists and the community is the Australia Foundation, a national public charitable trust founded in August 1994.

Since then, the Australia Foundation has secured more than \$40 million in bequests and donations, becoming one of the fastest growing national public charitable trusts in Australia.

"The Australia Foundation operates very similarly to a community foundation," State Trustees' Managing Director, Mr Edwin Gill said.

"The foundation offers donors considerable flexibility and can assist by directing funds towards a particular organisation or institution, or a specific area of interest such as medical science, the disabled, conservation, the advancement of education or religion, and other purposes. General donations to the Australia Foundation are invested and the income distributed to worthwhile charitable organisations and projects.

"A special feature of the Australia Foundation is the opportunity for individuals or companies to create a charitable fund bearing their name, thereby establishing a perpetual memorial. There are no legal fees when a charitable fund is established under the Australia Foundation.

State Trustees has set its own example by establishing a charitable sub-fund under the Australia Foundation. Management and staff



Mr Edwin Gill
Managing Director, State Trustees

contribute on a monthly basis through a series of "dress down Fridays", and other fund raising activities.

"The Australia Foundation is a perpetual charitable trust which means that it will go on forever to benefit the Australian community," Mr Gill said.



The Australia Foundation accepts donations of any size and all donations of \$2 or more are fully tax deductible. Donors may establish a charitable trust during their lifetime or through their will.

For further information on the Australia Foundation, please contact: Johann Bartholomeusz, Foundation Secretary.

p: (03)9667 6740
e: jbartholomeusz@

An honorary committee advises on the distribution of funds to qualifying charitable organisations. Beneficiaries of the Australia Foundation to date have included bush fire victims, children in need, and people with a disability.

State Trustees also administer the following private charitable trusts:

Angela Taylor Memorial Trust for police scholarships, established in 1987 with subscriptions by members of the Victorian Police and the public, in memory of Constable Angela Taylor who died on 20 April 1986, from injuries sustained when a bomb exploded outside the Russell Street Police Complex in Melbourne. The trust provides opportunities for members of the Victoria Police force to undertake advanced study and formal education or training.

King and Amy O'Malley Trust for home economics, which offers 30 scholarships annually throughout Australia for both under-graduate and post-graduate study.

Psychiatric Illness and Intellectual Disabilities Donations Trust Fund, which provides financial assistance to persons receiving treatment through a publicly funded mental health service.

M.A.Ingram Trust for research and preservation of Victorian flora and fauna.

J. J. Brooks Trust Fund, which provides education scholarships at the Victorian School for the Deaf.

John L Burge Trust for the purpose of aiding and helping those suffering from tuberculosis.

Info

p: (03)9667 6444
toll free: 1800 133 095 (outside Melbourne metropolitan area)
i: www.statetrustees.com.au



MEMBERS' FILE

Benevolent Society of NSW and Sydney Leadership

Throughout its history, the Benevolent Society of New South Wales has been at the forefront of social reform. In this context, the Benevolent Society supported Sydney Leadership program (also supported by the Sylvia and Charles Viertel Foundation) is a unique learning program for Sydney's leaders and one which provides an intensive learning experience for participants to examine in full circle the society where they live and work.

Using an experiential learning model, participants gain an insider's view of complex issues. These may include issues related to urban design and cultural amenity, Aboriginal relations, crime and justice, economic development, education, employment, environment, health, housing, information technology, media and communications, tourism, transport, utilities and youth affairs.

On one of Sydney Leadership's program days earlier this year, the group examined the Federal Government Program 'Living in Harmony', a major grants program designed to promote appreciation of cultural diversity. Minister for Immigration and Multicultural

Affairs, the Hon. Philip Ruddock MP, spoke about the ways in which parts of the program involved partnerships between business and community groups collaborating to disseminate the message of tolerance and harmony.

Sydney Leadership's day on 'Living in Harmony' was spent in western Sydney. The group visited intensive English classes at Holroyd High School where despite a total lack of English on their arrival in Australia, both adult and younger students were setting their sights on taking Year 12 HSC subjects.

Chief Executive Officer of the Benevolent Society of NSW, Jane



Sydney Leadership member Thuy Mellor with Holroyd High Students 'Living in Harmony' Program day

Schwager, said that as well as strong and effective leaders, "we need leaders to see the big picture; to understand how decisions today can affect the future and how different sectors of society impact on each other. Australia needs leaders who are committed to inclusiveness and social responsibility."

Info

- Applications for Sydney Leadership 2000 close 17 September
- For application form, try the Sydney Leadership website:
i: www.bensoc.asn.au/leadership
Program Manager, Penny Nelson:
p: (02) 9360 5888



Minister for Immigration and Cultural Affairs, the Hon. Philip Ruddock and Jane Schwager, CEO Benevolent Society of NSW

HOME AND ABROAD

Home conferences

VicHealth's Annual Symposium "Creating Corporate Citizenship"

when: 8 September, 1999
where: Melbourne
enquiries: Victorian Health Promotion Foundation,
Suite 2, 333 Drummond St, Carlton, Vic
3053.
p: (03) 9345 3200
f: (03) 9345 3222
e: partnership@vichealth.vic.gov.au

Social Welfare and Social Development in the New Millennium

International Council on Social Welfare
when: 14 – 17 September, 1999
where: Sydney
enquiries: Conference Secretariat: ACROSS, Locked Bag
4777, Strawberry Hills NSW 2012.
p: (02) 9310 4844
f: (02) 9310 4822
e: across@across.org.au

Hard Choices: Rights, Responsibilities and Resources for a Changing Australia

Theology, Economics and Public Policy Colloquium 1999
when: noon 29 – 30 September 1999
where: Canberra
enquiries: Hilary Regan, Conference Office, PO Box
504, Hindmarsh, SA 5007
p: (08) 8340 3060
f: (08) 8340 3450
m: 0413 700 379
e: hdregan@camtech.net.au

'Building Community, Reconciliation, Re-visioning Tomorrow'

Crossing Thresholds: The National Conference
when: 2 – 4 December 1999
where: Melbourne
enquiries: Conference Organisers, Aurora Practical
Solutions
f: (02) 6887 1449

Johns Hopkins Conference

The 12th Annual International Philanthropy Fellows
Conference of the Johns Hopkins Centre for Civil Society
Studies
when: 23 – 26 July, 2000
where: Melbourne
enquiries: Heather O'Connor
p: (02) 64 934 811

Abroad conferences

CIVICUS 1999 World Assembly

Towards a new Civil Society: The Changing Roles of CSOs,
Business and Government'

when: 21 – 24 September, 1999
where: Manila, Philippines
enquiries: 3rd CIVICUS World Assembly Office, c/o
Philippine Rural Reconstruction Movement
(PRRM), Kayumanggi Press Building, 940
Quezon Avenue, Quezon City, Philippines
p: 0011-63-2-3724989 / 3724994 / 4122622
f: 0015-63-2-3724995
e: civicus@csi.com.ph

10th EFC Annual General Assembly and Conference: 10 Years of Foundations for Europe

European Foundation Centre
when: 7 – 9 November, 1999
where: Berlin, Germany
enquiries: European Foundation Centre, 51 rue de la
Concorde, B-1050, Brussels, Belgium
p: 0011 322 512 8938
f: 0015 322 512 3265
e: efc@efc.be
i: www.efc.be/

IAP2 '99 Banff

International Association for Public Participation
Conference

when: 13 – 17 November 1999
where: Banff, Canada
enquiries: IAP2 Headquarters
PO Box 10146, Alexandria, VA 22310, USA
p: 0011 1 (800) 644 4273
f: 0015 1 (703) 971 0006
e: iap2hq@pin.org
i: www.iap2.org

Fourth International Conference of the International Society for Third-Sector Research

when: 5 – 8 July 2000
where: Dublin
enquiries: International Society for Third-Sector
Research, The Johns Hopkins University,
559 Wyman Park Building, 3400 N. Charles
St, Baltimore, MD, 21218-2688 USA
p: (410) 516 4678
f: (410) 516 4870
e: istr@jhu.edu
i: www.jhu.edu/~istr



A REPORT COMMISSIONED BY THE COMMITTEE FOR ECONOMIC DEVELOPMENT OF AUSTRALIA (CEDA) AND WRITTEN BY PROFESSOR SOL ENCEL WILL BE LAUNCHED IN BRISBANE ON SEPTEMBER 3. WE PUBLISH PART OF THE FOREWORD TO THE REPORT, BY PHILANTHROPY AUSTRALIA MEMBER AND BUSINESSMAN, JOHN L FITZGERALD, CHAIRMAN, TOOGOOLAWA CHILDREN'S HOME LTD AND TRUSTEE, COMMITTEE FOR ECONOMIC DEVELOPMENT OF AUSTRALIA

WELFARE BEYOND 2000: A Corporate Response

Why is it that estimates of 'youth risk' have increased 250% in the last ten years? Why do we have the second highest youth suicide rate in the world? Why has government direct welfare service expenditure grown by over 89% since 1989? Why do nearly three-quarters of single parent families rely on the sole parent pension? And most importantly, what can we do about the rising level of unmet need in welfare, which shows no signs of falling?

A group of CEDA Trustees, all of whom are business people, funded this study to highlight the exponential growth in welfare requirements and crystallise the need for joint action by government and the private sector.

The report exposes the core of the problem as inertia. Collectively we don't think welfare issues, such as youth homelessness, youth education and youth unemployment can, or should, be addressed on a collective non-government scale.

The welfare crisis is likely to be exacerbated because, as this report observes, the rise in demand for welfare services coincides with pressure on governments to balance budgets, resulting in cuts to services. And many welfare agencies feel that government grants are weighted too heavily towards bureaucratic processes, limit the sharing of their resources and impose reporting requirements irrelevant to the agency's objectives.

The solution requires long-term decisions and co-ordinated action by government and the private sector, with a five-to-ten year objective to develop a corporate 'culture of giving and caring'.

Incentives, like the tax deductions for investment in the film industry and the 150% tax deduction for research and development expenditure, should be investigated and trialed in the welfare sector. If nothing else, it will increase business awareness of the welfare crisis and

the importance of taken the lead and assuming more of the financial burden into the next century.

The concept of matching grants, where government joins with the private sector to work together on special welfare projects, should also be investigated and trialed. An approval and qualification process would ensure a reduced cost in total welfare services through increased effectiveness of private sector operations compared to government welfare costs.

One Businessman's View

My own involvement in this area began in 1990 with a philanthropic interest in 'youth at risk' 1990, with my company sponsoring a residential care program which expanded to provide schooling for these young people. Initially the involvement was funding only, but now I and my work colleagues also spend time in volunteer hands-on programs with them.

I naively thought other small businesses that had achieved financial success might also adopt a philanthropic dimension to their corporate culture. My impressions, gained from speaking with other business people indicate that it is quite the opposite. Along with many other Australians, they expect that governments should continue to meet the nation's growing welfare needs. While there are some exceptions to the norm, these are a minority.

My firsthand experience of welfare recipients not accepting responsibility indicates the potential destructiveness of government handouts. The parents of one child who attended our school were asked to contribute to the school's costs for providing the child with breakfast and lunch five days a week and for extra curricular activities. The parents refused to make a contribution, even as little as \$2 per week. Their expectation was that somebody else should take responsibility.

The recent announcement by the Federal Government of \$51 million for welfare concessions amounts to using a feather to leverage a large boulder. It will be completely ineffective in establishing a Foundation to ensure that all members of our society accept responsibility for their own lives, while encouraging us to serve and care for those less fortunate.

These measures, coupled with a government welfare reform strategy along the lines of 'work for the dole' and 'basic literacy requirements' for youth receiving social security, could act as a circuit breaker and stop poverty from acting as a growth industry, before 'able-bodied' welfare becomes a way of life. Of course, this growth is not limited to the needy as bureaucracy and professional 'helpers' soak up a significant portion of each budget.

My experience proves that business, particularly small business, has skills that can add value to direct welfare projects. Financial incentives for business to become involved in welfare provision could foster a culture of giving, caring and actively contributing.

This fundamental realignment could arrest our materialism and dependence on technology as a measure of personal happiness and reinstate basic human values missing from the larger community. It may be a spiritual awakening that we yearn for giving our pride in the Australian spirit and value of mateship.

Our national spirit was evident fifty-odd years ago when a small band of Diggers on the Kokoda Trail repeatedly volunteered to go back to the front line in the face of overwhelming odds. When asked why, they replied 'we did it because that was what was expected of us'. This is the true spirit of Australia.

Although the concept of spirituality is not often canvassed in political or economic circles, it can be identified as a response to our innate humane instincts. This hasn't changed in the fifty years since Kokoda. If you passed a six-year-old in the street, alone, distressed and suffering, would you go back and offer help, accepting some immediate responsibility? Of course we all would.

With government incentives and a decisive welfare reform strategy, I believe businesses can rally with the community to 'go back for' the Australians we have left behind in our rapid technological advancement over the last twenty-five years.

That's what's expected of us.

Info

For further information about Welfare Beyond 2000, contact
CEDA Brisbane
p: (07) 3844 1779
CEDA Sydney
p: (02) 2999 7022
CEDA Melbourne
p: (03) 9662 3544





LANDMARKS: the Tenth Anniversary edition of *Philanthropy*

Ten years and forty editions ago, *Philanthropy* – the journal – first appeared. *Philanthropy* has provided a window into the activities of the organisation and its members, as well as covering trends and innovations within the world of philanthropy and social development. *Philanthropy* Australia members have repeatedly told us that the journal is one of the most valued and enjoyed services of the organisation. Of particular and enduring interest are the stories of the many exciting projects funded by member trusts and foundations. We present here a brief retrospective of *Philanthropy*, and some of the landmarks it has covered.

When Edition 1 appeared in 1989, edited by Jane Sandilands, the Australian Association of *Philanthropy* had 45 members. Marion Webster was the Executive Director, Iris Mason provided administrative support, and Council office bearers included Vincent Kiss, Sarah Stegley, Jill Reichstein, and Michael Liffman. The keynote address to the 1988 AGM was by Mr Barry Gaberman of the Ford Foundation, New York.

On the cover of Edition 3 is a photo of “The Godmothers” – Pat Feilman

and Meriel Wilmot. The Executive Director’s report notes: “Their energy and dedication over many years has undoubtedly paved the way for the development of the Association, its ability to stage the first national conference on philanthropy and its role into the future.”

By Edition 4, subscriptions to *Philanthropy* became available to non-members.

Edition 5 (Winter 90) reported on the launch by Dame Elisabeth Murdoch of “A Guide to Informed Giving” – produced in conjunction with the Stegley Foundation. Michael Liffman had become President of the Association, and the Reark Project, a major study on patterns of giving, was announced.

Edition 8 (Autumn 91) reported on the first graduation from the Williamson Community Leadership Program, the launch of “Giving Australia” (the first nation-wide survey of giving by individuals, corporations, small business and bequests), and the departure of Marion Webster, who after three years with the Association, was moving on to ANZ Charitable Trusts.

Edition 9 (Winter 91) was edited by the new Executive Director, Max Dumais.

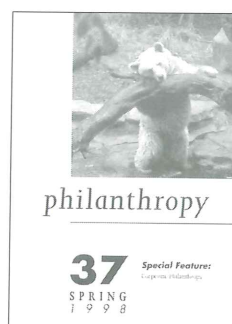
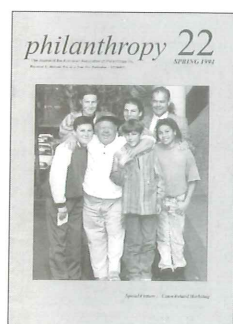
The first grant-seekers’ workshops to be offered by the Association were announced in Edition 11 (Summer 91), along with a constitutional change allowing a new category of Associate Membership.

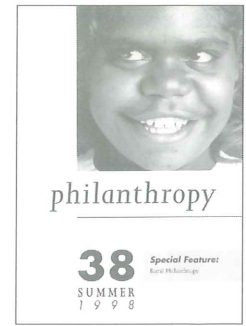
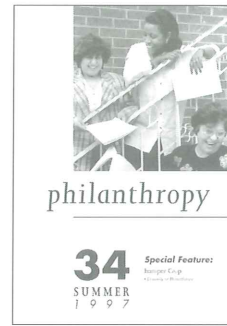
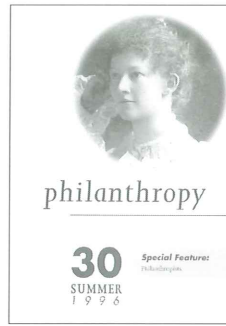
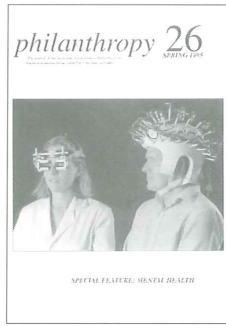
In Autumn 92, the Association announced that it had established the Resource Centre Library, taking over a collection which had been housed by ANZ Executors and Trustee Co Ltd. The 1992 executive officers included Martin Carlson, Robin Hunt, Adolf Hanich, and Jill Reichstein. A report on the new Body Shop Youth Traineeship Scheme, developed in partnership with the Brotherhood of St Lawrence, appeared in Edition 13 (Winter 92).

Edition 14 (Spring 92) sadly noted the passing of Ken Myer, and compared the Myer Foundation’s recent project for unemployed people in Gippsland, with Sidney Myer’s construction project at Yarra Boulevard which provided work for 1400 men during the Great Depression. Over 300 people participated in grant-seeker workshops over 1992, including the first workshop held in Adelaide. Jane Tewson visited Australia as a guest speaker.

Edition 18 (Spring 93) was dedicated to the memory of John Bell, Managing Director of Espirit and Chairman of Espirit Cares Trust, whose “commitment to the cause of long term unemployed and the homeless has been an inspiration to many”. The Association office moved from the 8th to the 4th floor of 20 Queen Street, Melbourne, and Jan Baragwanath joined as administrative secretary, replacing Iris Mason.

Edition 20 (Autumn 94) included a new segment for trustees, focussing





on investment issues. It also reported on the Association's submission to the Industry Commission on Charity.

Edition 23 (Summer 94) included a 'vale' to Sir Ian Potter. There was also a report on the 'Charity at the Crossroads' conference, convened by the Association, the International Centre for Not-for-profit Law, and Monash Graduate School of Government.

The 1995 Executive Council included Jill Reichstein, Ben Bodna, Adolf Hanich, and Fleur Spitzer.

Edition 27 (Summer 95) was the last edited by Max Dumais who had announced his resignation as Executive Director.

Edition 28 featured a new design and layout style, celebrated the Association's 21st birthday, and welcomed a new President – Ben Bodna, and a new full-time Executive Director – Elizabeth Cham.

Edition 29 marked the relocation of the three-person secretariat to 111 Collins Street, with the pro bono support of the Ian Potter Foundation.

Edition 30 (Summer 96) included a special feature on individual philanthropists, including Helen Schutt, Sidney Myer, Thomas Baker, Elizabeth Austin and David Packard. This has long been a popular back issue of the journal.

Edition 31 (Autumn 97) reported on the AGM that approved a new constitution and a new name –

Philanthropy Australia. This edition also formally re-introduced Jane Sandilands as joint editor, with Elizabeth Cham.

Edition 32 (Winter 97) reported on a landmark agreement signed between the Council on Foundations (USA) and Philanthropy Australia. President Ben Bodna reported on PA's role in raising concerns about proposed new legislation in Victoria and New South Wales affecting management fees charged by trustee companies. Also reported were discussions commencing with the Prime Minister's office about a proposal to develop a framework for philanthropy in Australia.

Edition 33 (Spring 97) reported that Donna Greaves had been working as the Association's representative in Sydney, the Resource Centre was managed by Rachael Bahl, with the support of the Australia Foundation for Culture and the Humanities and the Federal Department of Communication and the Arts. The Australian Guide to Scholarships and Awards was published, Esther Lethlean came on board as the new Office Manager and Research Assistant, and a web-site was being developed. The Queensland Community Foundation was launched in May 1997.

By Summer 97 (Edition 34), Philanthropy Australia had 93 members, had successfully lobbied to amend the Taxation Act regarding charitable trusts, and the Prime Minister had agreed to convene a Round Table to discuss potential

partnerships between the government, business, the philanthropic and community sectors.

Edition 35 (Autumn 98) reported on the Round Table meeting, the IMAG Conference in Mexico, funding by the Victorian Health Promotion Foundation for grant-seeker's forums, as well as including a tribute to the late Rivkah Mathews.

In Spring 98, Philanthropy Australia signed a co-operative agreement with the European Foundation Centre. The Federal Government had provided funding to conduct the International Speakers' Program and the Information Brokerage and Exchange Service.

In Edition 38, the Executive Director reported that the Taxation Working Group of the Round Table had made recommendations on taxation amendments which were under active government consideration, and Edition 39 (Autumn 1998) was able to report on the Prime Minister's announcement that a \$51million package of tax measures would be introduced to encourage greater philanthropy. Also reported was the formation in December 1998 of the Indigenous Issues Affinity Group.

In addition to these landmarks, the journal has covered a diverse range of issues, members, individuals and projects, providing a valuable 'large canvas portrait' of a most active and creative philanthropic community.

Philanthropy Australia Inc

Leading Members

Myer Foundation
Thomas Foundation
Ian Potter Foundation
William Buckland Foundation
Pratt Foundation



THE MYER FOUNDATION



Council

Ms Eve Mahlab AO
Lady Southey
(The Myer Foundation)
Mr Alan Schwartz
(Besen Family Foundation)
Mr Ben Bodna
(Jack Brockoff Foundation)
Mr Graeme Wise
(The Body Shop)
Ms Dur-e Dara
(Victorian Womens Trust)
Mr Barry Capp
(William Buckland Foundation)
Ms Frances Davies
(Australian Youth Foundation)
Prof Tom Healy
(The Ian Potter Foundation)
Ms Elizabeth Cham
(Executive Director)

Full Members

George Alexander Foundation
AMP Foundation
The Andrews Foundation
ANZ Foundation
ANZ Executors & Trustee Co Ltd
Australia Foundation
Australia Foundation for Culture
and The Humanities
Australian Hospital Care
Australian Multicultural Foundation
The Australian Youth Foundation
Bankers Trust Australia
The Percy Baxter Charitable Trust
Besen Family Foundation
BHP Community Trust
The Body Shop
Bokhara Foundation
The Jack Brockhoff Foundation
The William Buckland Foundation
L.E.W. Carty Charitable Trust
Colonial Foundation Ltd
Danks Trust
Education Foundation
Eve Mahlab
The Felton Bequest
Freehill Hollingdale & Page
Hill and Knowlton
The Invergowrie Foundation
A.L. Lane Foundation
Law Foundation of New South
Wales
The Flora & Frank Leith Charitable
Trust
Levi Strauss (Australia) Pty Ltd
The Dafydd Lewis Trust
Lord Mayor's Charitable Fund

Lotteries Commission of W. A.
Macquarie Charitable Foundation
Ltd
Mayne Nickless Ltd
Ronald McDonald's House
Charities
H. V. McKay Charitable Trust
Melbourne Community Foundation
The Miller Foundation
The Myer Foundation
Sidney Myer Fund
Perpetual Trustees Australia Ltd
Pethard Tarax Charitable Trust
The Ian Potter Foundation
The Pratt Foundation
The Queen's Trust for Young
Australians
The Queensland Community
Foundation
The R.A.C.V. Foundation
Lance Reichstein Charitable
Foundation
Rio Tinto Services Ltd
R.E. Ross Trust
Royal Melbourne Institute of
Technology
Sir Albert Sakzewski Foundation
Helen M. Schutt Trust
Shell Australia Limited
Sony Australia Limited
SoundHouse Music Alliance
Fleur Spitzer
State Trustees Ltd
The Stegley Foundation
Sunshine Foundation
Telematics Course Development
Fund Trust
Thomas Foundation

R & J Uebergang Foundation
 The Gualtierio Vaccari Foundation
 Victorian Health Promotion Foundation
 Victorian Womens Trust Ltd
 Sylvia & Charles Viertel Charitable Foundation
 J. B. Were & Son Charitable Fund
 Westfield Foundation
 Westpac Banking Corporation
 The Norman Wettenhall Foundation
 The Hugh Williamson Foundation

Associate Members

AAMI
 AMA (NSW) Charitable Foundation
 Anti-Cancer Council of Victoria
 Asthma Foundation of NSW
 Australian Rotary Health Research Fund
 Benevolent Society of NSW
 Foundation for Aged Care
 Foundation for Development Cooperation
 The Garvan Research Foundation
 The Bobby Goldsmith Foundation
 The Hammond Care Group
 Ideal Human Environment Social Research Foundation
 Inspire Foundation
 The Landcare Foundation
 The Leukaemia Foundation
 Monash University
 The Northcott Society
 Royal Blind Society, NSW
 Rusden Foundation

The St. James Ethics Centre
 The Smith Family
 The State Library of Victoria Foundation
 The State Library of New South Wales Foundation
 Sydney City Mission
 Sydney Symphony Orchestra
 United Way Australia Ltd
 University of Melbourne (Alumni Officer)
 University of Western Australia
 Victoria University of Technology Foundation
 Vision Australia Foundation

New Members

Philanthropy Australia would like to warmly welcome the following new members:

Full Members

The Calvert-Jones Foundation
 Coca-Cola Amatil
 JLF Group of Companies
 Bruce and Ruth Redpath

Associate Members

CARE Australia
 Australian Refugee Foundation
 Lend Lease
 Royal Botanic Gardens
 Tabcorp Holdings
 Tasmanian Museum & Art Gallery
 University of South Australia
 Variety Clubs of Australia

Pro Bono Support

Philanthropy Australia wishes to thank the following for invaluable pro bono support

ANZ Bank
 Arthur Andersen
 Bovis Australia
 Chubb Security
 Phillip Chun & Associates
 Freehill Hollingdale & Page
 Hassel Architects
 Macquarie Bank
 MFM (Myer Family Management)
 Norman Disney & Young
 Ian Potter Foundation
 Permanent Trustees
 Perpetual Trustees
 Relay Removalists
 Rio Tinto
 Sutcliffe Interiors
 J.B.Were
 Westpac

International Links

Philanthropy Australia maintains ongoing links with the following associations of grant-makers around the world:

Council on Foundations (Washington)
 The European Foundation Centre (Brussels)
 The Canadian Centre for Philanthropy
 Asia Pacific Philanthropy Consortium

Philanthropy, Journal of Philanthropy Australia Inc.
Level 10, 530 Collins Street, Melbourne 3000

Tel: +61 3 9620 0200 Fax: +61 3 9620 0200

Tel: +61 2 9362 3264 Fax: +61 3 9362 1215

email: pa@philanthropy.org.au

website: <http://www.philanthropy.org.au>

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