

# Philanthropy

Autumn 2001 – Issue 45



*National Association for Grantmaking Family, Private,  
Corporate and Community Trusts and Foundations*



**PHILANTHROPY**  
*Australia*

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ISSN: 1036-3017

Front Cover: Girls learn skills through teamwork and experience  
(Invergowrie Foundation).

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Philanthropy, journal of Philanthropy Australia Inc  
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Registered by Australia Post as a Print Post Publication – 581/827/0058

Design, layout and print management by MDM Design Associates,  
Suite 6, 10 Hoddle Street, Abbotsford, Victoria.

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## From the National Director

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Australia has been selected as the venue for the Worldwide Initiatives in Grantmaking Support (WINGS) three day conference, scheduled for March 2002.

The decision was finalised at a meeting of the WINGS Secretariat in the United States, in early January.

The conference will be the largest gathering of international philanthropists and philanthropic organisations ever to assemble in Australia. WINGS will bring international philanthropy in force to Australia, placing the focus squarely on our sector and its achievements.

The very positive aspect for members is that this will bring fresh expertise to Australia, the opportunity to meet with international colleagues and participate in conference-related activities. It's a great opportunity to raise the profile of philanthropy within Australia.

The gathering will also provide an opportunity for Australian trusts and foundations to develop closer ties with international funders – and possibly develop co-funding proposals.

Other peak bodies around the world have expressed great interest in Philanthropy Australia's structure and operation. We are a hybrid organisation, serving grant-makers (our primary aim) and also offering a Resource Centre and other services to grant-seekers. Serving grant-seekers is ultimately a service to grant-making members, because better educated grant-seekers develop better projects and more relevant grant applications. A clearer focus can be developed on achieving common objectives.

Philanthropy Australia is also different from many other peak grant-maker bodies because it earns its own money, and because we are social entrepreneurs. Consultancy services have always provided a significant part of our income, and this grows each year. Further, Philanthropy Australia stands out because we have positioned ourselves to ensure that philanthropy has become part of the public policy agenda in Australia.

Our role as advocate for the sector is of interest to international counterparts – particularly our neighbours in Asia, who are keen to build and sustain civil society in their own regions, with philanthropic organisations as major players.

We have developed in a very different environment from that of philanthropic foundations and peak organisations in the United States, and as such, we have much to offer those in other parts of the world where a philanthropic sector is only just emerging.

As an organisation, we are small, and relatively young, but we offer a model that is of interest around the world. The WINGS conference will provide an excellent opportunity to showcase, not just the work of Philanthropy Australia, but also of Australian philanthropists.

On another note, I would like to congratulate our President, Lady Southey, on her appointment earlier this year as Lieutenant Governor of Victoria. This appointment has been made in recognition of Lady Southey's many years of commitment to the community, as a philanthropist, as a volunteer, and as a person who makes an enormous contribution with humble dignity and quiet efficiency. These are the very attributes for which Philanthropy Australia members have so warmly supported her as their President. To have our leader appointed to a public position of honour and responsibility is further recognition of the value of the philanthropic community and its work.

A handwritten signature in cursive script, reading "Elizabeth Cham".

Elizabeth Cham  
National Director

# Letters

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Steven Burkeman

Dear Philanthropy Australia,

I was most grateful for Lady Southey's kind words in the Summer edition of Philanthropy about my visit last November. Jane and I are very grateful for the warm welcome we received from Philanthropy Australia members (and others) everywhere, and we have fond memories of a very happy time. I hope that contacts made can be sustained and for this purpose it may be helpful to publish my email address.

While I am writing, I would like also to point out that a transcription error in the piece published in the Summer edition led to a misspelling of a name. Should anyone wish to seek out the quotation from Harold 'Lusky', they will have a better chance of doing so if they look up Harold Laski, the political theorist who died in 1950.

With good wishes,

Steven Burkeman,  
York, UK  
[burkeman@gn.apc.org]

Dear Philanthropy Australia,

Re: Spring 2000 Issue, Promoting Community Giving – The Education About Philanthropy Project.

We read the column about this project on page 12 of your Spring 2000 issue and were a little puzzled. The article indicates that the research conducted turned up very few examples of programs in the US and nothing in Canada or the UK. On the contrary, programs of this type seem to be very much in the news these days and there appears to be a growing body of examples in the US. There are also examples in Canada, and at least one exists in the UK (in Gloucestershire, England).

We thought you would be interested in knowing that the 'Education About Philanthropy' Project joins numerous others that share similar goals – all for the good of young people and their communities.

The Spring 2000 issue was very interesting and informative. It's great to get such a good snapshot of what is going on in Australia, particularly in relation to community foundations. Thanks for sharing it with us.

Sincerely,

Monica Patten,  
President and CEO  
Dagne Forrest, Coordinator, International Projects

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Ottawa, Ontario K1P 5E1  
Phone: 613-236-2664 Fax: 613-236-1621  
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# News and Views

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*Jan Cochrane-Harry*

## **Jan Cochrane-Harry joins Philanthropy Australia Council**

Ms Jan Cochrane-Harry, of Perpetual Trustees Australia, is the newest member of the Council of Philanthropy Australia.

As National Manager Charitable Planning Services with Perpetual Trustees Australia Ltd, Ms Cochrane-Harry has senior responsibility for overseeing the management of the 284 charitable trusts (of which 91 are discretionary) with a capital value of \$500M. Approximately \$20M is distributed annually to charitable organisations throughout Australia. In November 2000 this will be added to from the acquisition of AXA Trustees which holds 92 charitable trusts valued at \$50M.

Ms Cochrane-Harry's primary responsibility is setting up new charitable foundations with donors and assisting people to develop their charitable intent through their Will.

She also works closely with charities and not-for-profit organisations to provide advice and assistance to them when applying for project funding, and to inform the decision-making processes within Perpetual and with their co-trustees regarding distribution of gifts.

Ms Cochrane-Harry has extensive experience in management over a 25 year period in the community, public and private sectors, and she holds an MBA from Melbourne University.

Ms Cochrane-Harry fills a vacancy that was created by the resignation from Council last year of Graeme Wise of The Body Shop, due to increased work commitments.

The President, Lady Southey, has welcomed Jan Cochrane-Harry to the Council, noting that her wide experience in the community, business and philanthropic sectors, together with her personal enthusiasm and energy would be of enormous value to the Council's work.

## **Green on disabilities**

An audience of more than 25 trustees and staff of trusts and foundations gathered in late February for the inaugural meeting of the Disability Affinity Group, jointly auspiced by the Brockhoff Foundation and Philanthropy Australia. Professor David Green, the former Public Advocate and now Chairperson of the Disability Advisory Council to the Victorian Government spoke on 'Current Issues relating to People with Disabilities'.

Ben Bodna, trustee of the Brockhoff Foundation and Vice-President of Philanthropy Australia chaired the meeting, which agreed that communication and exchange of up-to-date information in current disability services issues was a key requirement for trusts and foundations funding in the area. Prior to the next meeting, scheduled for May, a series of proposals about how an Australia wide communication network can operate will be circulated.

## **Disability resources reading list**

Philanthropy Australia has compiled a Disability Resources Reading List, comprising published materials held by its Resource Centre, online discussion lists and other related websites.

For further information on the Disability Affinity Group or to receive a copy of the reading list, please call Philanthropy Australia on (03) 9620 0200 or check its website, [www.philanthropy.org.au](http://www.philanthropy.org.au) or Brockhoff Foundation on (03) 9842 0667.

## **Brockhoff Foundation – new Leading Member**

Philanthropy Australia is delighted to welcome its newest Leading Member, the Brockhoff Foundation.

Leading Members agree to provide additional support and leadership to Australia's peak association of grant-makers, as part of their commitment to building the sector nationally, and to enhancing the role and profile of innovative and strategic philanthropy.

The Brockhoff Foundation joins foundation Leading Members, William Buckland Foundation, The Myer Foundation, the Ian Potter Foundation, the Pratt Foundation, and Thomas Foundation.

Philanthropy Australia also welcomes the initiative of the Brockhoff Foundation in auspicing a new Disability Services Affinity Group, designed to bring together trusts and foundations with a common interest in funding and developing disability services.

## Camilla Cowley at AGM

Convenor of Landholders for Co-existence and the Brain Foundation's 1998 Woman of the Year, Camilla Cowley is guest speaker at Philanthropy Australia's Annual General Meeting in April.

Camilla Cowley is a pastoralist from South West Queensland, and an active campaigner for co-existence with native title claimants and reconciliation with indigenous Australians.

In a moving speech to the 'Sea of Hands' gathering in Canberra in 1997, Camilla Cowley said:

"I bring my complete acceptance that the place I have in Australia today is completely dependent on the original dispossession of indigenous Australians after 50,00 or maybe 150,000 years of previously belonging to that same place.

"I bring the knowledge of personal experience that it is possible for white and black to listen to each other, to talk out our differences, and to map out a road to co-exist as equals in a land we can share. Only the will is required.

"I bring a sense of loss that I can never really be at home again in a white-landholder community, many of whom refuse to own our scarred past and see my stand as naïve and foolish.

"I also bring a deep sorrow and aching regret for my 'so late in the day' full awareness of the tragic truth of the shared history of black and white Australians with the repercussions of this most unequal history continuing to be felt today".

The Annual General Meeting will be held on April 26th at the new Melbourne Museum. The keynote address will be presented following presentation of reports and election of Council.



Camilla Cowley and daughter Trisha with Aunty Ethyl Munn and Lynette Nixon, two Gunggari women, as they signed the document of co-existence between the Cowley family and the Gunggari People during the ceremony held in July last year in Illmargani, the Gunggari Nature Refuge set aside on the Cowley property.

## Stegley Foundation closure

The Stegley Foundation was established as a limited life trust in 1973. For almost thirty 30 years the Foundation has supported organisations and groups working within local communities, or with communities of interest, to challenge discriminatory policy and practice, build social infrastructure and promote social justice and equity.

The Foundation is no longer making grants and will close in July.

One of the ways in which the Foundation will continue to make a contribution to the ongoing debate about how best to support initiatives designed to change the circumstances of, and improve opportunities for, disadvantaged groups in our society, is through the publication of its history. This book, to be published within the next 12 months, uses the history and experiences of one Foundation to explore the nature and position of philanthropy within the increasingly complex and individualised world of the twenty-first century.

For further information on the Foundation's closure, please contact Trudy Wyse on 9826 2777.

## New glossary will clarify language of philanthropy

A new glossary, *Understanding the Language of Philanthropy*, will be published by Philanthropy Australia in June.

The glossary has been developed by Dr Diana Leat, Visiting Senior Research Fellow at Deakin University and Philanthropy Australia.

"The purpose of the glossary is to achieve better communication – to help people navigate the increasingly complicated and sometimes mystifying language of philanthropy", said Dr Leat.

"Crucially, it is about understanding the way terms are used in, for example, the UK, US and Australia – where the same term may be used to mean quite different things. This is an attempt to avoid misunderstandings, by clarifying the growing number of terms used in philanthropy literature or in relation to philanthropy", she said.



Dr Diana Leat

### Accountability and the voluntary sector

The National Institute for Governance held a seminar on National and International Perspectives on Accountability and the Voluntary Sector on 6th April in Canberra.

Speakers included:

- Dr Diana Leat, of Philanthropy Australia, and Visiting Professor, Centre for Voluntary and Not-for-Profit Management, City University Business School UK;
- Prof David Good, Assistant Deputy Minister, Human Resources Development Canada;
- Mr Robert Fitzgerald, Community Service Commissioner for NSW Government;
- Hon Prof Jim Carlton, Adjunct Professor, National Institute for Governance and formerly Secretary General of the Australian Red Cross.

Issues examined included:

- What is the voluntary sector – in terms of taxation and other matters?
- What new accountabilities are expected of the voluntary sector under the new 'contract state'?
- How do foundations and trusts, which provide the sources of funds for many voluntary activities and gain taxation concession, fit into the reporting and new accountability framework?
- Is the involvement of the voluntary sector in policy development becoming more extensive and what does that mean for accountability?
- Will tightened accountability arrangements unduly restrict social entrepreneurial behaviour in the voluntary sector?

For further information on conference outcomes, contact Pam Richmond, National Institute for Governance at the University of Canberra, telephone (02) 6201 5607 or email: [nigov@management.canberra.edu.au](mailto:nigov@management.canberra.edu.au)

### Reporting date extended for charities inquiry

The Inquiry into the definition of charities and related organisations has been granted an extension of time to 30 June 2001 within which to complete its report.

To date, the Committee has received more than 350 submissions from interested individuals and organisations. Given the number of submissions to be considered by the Committee, and the complexity of the issues involved, the Chairman of the Inquiry, the Hon. I. F. Sheppard AO, has asked that the Federal Government extend the reporting date for the Inquiry from 31 March 2001 to 30 June 2001. The Government has agreed to the extension.

The Prime Minister announced the details of the inquiry into definitional issues relating to charitable, religious and community sector not-for-profit organisations on 18 September 2000.

The members of the Inquiry Committee are: (Chairman) the Hon. I. F. Sheppard AO QC, former Judge, Supreme Court of NSW and Federal Court of Australia; Mr Robert Fitzgerald, Commissioner of Community Services NSW and former President of ACOSS; and Mr David Gonski, Principal of Wentworth Associates and a member of the Prime Minister's Community Business Partnership.

The Committee is assisted by a secretariat drawn from relevant Commonwealth departments and the community sector.

Further information is available on the Inquiry's internet site [www.cdi.gov.au](http://www.cdi.gov.au) and from the Secretariat to the Inquiry telephone (02) 6263 4346.

### Cham elected to Civicus

Philanthropy Australia National Director, Elizabeth Cham, has been elected to the Board of Civicus, the world alliance for citizen participation.

Dedicated to pursuing a world in which voluntary citizen action is a predominant feature of the political economic and cultural life of all nations, Civicus' membership comprises activists from a range of community and non-government organisations. Its programs and publications are aimed at increasing the visibility and understanding of civil society, enhancing its resource base and developing international principles for the laws and regulations of civil society organisations.

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## Trustee workshops for new board/staff

A one day workshop for new trustees and staff members of trusts and foundations will be offered for the first time in May.

Developed by staff of Philanthropy Australia, based on its new publication, *A Guide to Working with Foundations in Australia*, the workshop will familiarise new trustees and staff with key management and policy issues and provide a comprehensive overview of the Australian philanthropic sector.

"It's a great opportunity for new staff and trustees to orient themselves and gain a greater understanding of the very specialised sector in which they will be operating", said National Director Elizabeth Cham. Initially scheduled for Melbourne and Sydney, workshops will be held in other states if there is sufficient demand. For details, please call Philanthropy Australia on (03) 9620 0200 or visit its website, [www.philanthropy.org.au](http://www.philanthropy.org.au)

## Australian Directory of Philanthropy workshops

The two-hour workshops are aimed at teaching grant-seekers how to most effectively use the *Australian Directory of Philanthropy* to research potential grantmakers and to effectively frame grant applications. Participants also learnt more about Australian trusts and foundations, and the environment in which they operate. Participants will gain further understanding of the philanthropic environment and how to communicate more effectively with trusts and foundations.

Topics include:

- What is a Foundation;
- The Role of Foundations;
- Facts About Foundations;
- Types of Foundations in Australia;
- Legal Constraints: Who Can Foundations Fund;
- The Environment in Which Foundations Operate;
- Researching Prospective Funders; and
- Framing an Application.

Workshop cost is \$121.00 (GST inclusive) which includes a copy of the *Australian Directory of Philanthropy*. Dates for upcoming workshops are as follows:

### Melbourne

Thursday 31st May (10am-12pm)  
Thursday 28th June

### Adelaide

Tuesday 15th May

### Perth

Wednesday 16th May

### Sydney

Tuesday 5th June

### Brisbane

Wednesday 6th June

For bookings, expressions of interest in workshops outside of Melbourne, or other information, call (03) 9620 0200 or visit the website at [www.philanthropy.org.au](http://www.philanthropy.org.au).

## UK Non-Profit leader in Australia in May

Stuart Etherington, Chief Executive of the National Council for Voluntary Organisations (NCVO) will speak at Philanthropy Australia Members' Forums in July. NCVO is the UK umbrella organisation for voluntary organisations and charities. It represents these groups to Government and other organisations, and offers a large range of services.

Stuart Etherington serves in an honorary capacity on a number of key government committees and is Trustee of the Charities Aid Foundation, Business in the Community, and the English Churches Housing Group.

He will speak at meetings in Sydney, Melbourne and Perth.

### Council president is lieutenant governor

President of Philanthropy Australia, Lady Southey, is Victoria's new Lieutenant Governor. Lady Southey took up her new duties officially on 1 January 2001.

"Lady Southey is a distinguished Victorian who has devoted a great deal of her life to philanthropic work. She brings to the role of Lieutenant Governor enormous energy and a dedication to service to the Victorian community", said Victorian Premier Mr Steve Bracks, announcing her appointment.

As well as representing the Governor, Mr John Landy, when he is unable to perform constitutional duties, the Lieutenant Governor's community role has also been expanded.

"Lady Southey, with her lifetime commitment to voluntary services is therefore an ideal choice for this expanded role", said Mr Bracks.

"This will involve building closer associations between the Office of the Governor and opinion leaders at all levels and in all parts of Victoria, as well as meeting with all groups in the community".

The Council of Philanthropy Australia, on behalf of all people and agencies associated with philanthropy in Australia, formally congratulated Lady Southey on her appointment.

"The Council respects Lady Southey's capabilities for leadership and the significant contribution that she and the Myer family make to the well-being of Victoria and Australia, and wish their President much satisfaction and joy in her new role" said Council member and Vice-President, Ben Bodna.

### Groundbreaking guide takes an Australian perspective

A groundbreaking handbook which deals with the management of trusts and foundations from an Australian perspective is scheduled for publication in May.

*A Guide to Working with Foundations in Australia* has been developed for Philanthropy Australia by Heather O'Connor and Diana Leat.

As well as an overview of the Australian philanthropic scene, the guide deals with foundation structures, including the responsibilities and powers of trustees, governance and administration, Board selection, orientation and training, staff selection and compensation, creating policies and priorities and decision-making criteria.

"Almost all the literature extant on developing and managing a successful foundation is from the UK, USA and Canada", said Heather O'Connor, one of two authors, who is also administrator of the Mumbulla Foundation

"The Australian philanthropic sector is large enough and mature enough to develop its own literature, which acknowledges our unique local perspective".

*"Almost all the literature extant on developing and managing*

## Melbourne Foundation CEO selected for US community foundation course

Peter Hudson, CEO of the Lord Mayor's Charitable Fund which operates the Melbourne Foundation was selected to take part in the US Community Foundations Institute's (CFI) professional development course at the University of Indiana, in January 2001.

Peter was one of 60 people chosen from more than 200 applicants to attend the course, which was designed to provide professionals, trustees and other leaders with orientation into the community foundation field.

The Lord Mayor's Charitable Fund was delighted that Peter was selected to participate in the Institute's first ever course.

Participants were provided with a fully-funded scholarship covering travel, accommodation and tuition expenses.

The Community Foundations Institute was founded to provide ongoing training, education and research for the community foundation field. Development of the Institute has been through the Centre on Philanthropy at Indiana University following a grant from the Lilly Endowment. The Institute's foremost goal is to provide professionals with the skills and knowledge that are needed to succeed in leadership positions within community foundations.

Courses offered will include professional development and marketing. In future courses will be delivered in a variety of ways, including via the Internet.

"We believe the course provides an excellent learning environment and experience for participants. The goal of the Institute is to help community foundation personnel to be effective in addressing key management challenges in the development and operation of their foundations" CFI Director, Steve Alley said.

Participants in the initial course included representatives from 28 US states with four international members from Australia, Italy, Brazil and Mexico. The capital asset base of participating foundations was in excess of \$4.9 billion.



*Left to right: Dr Gene Tempel, Executive Director, The Centre on Philanthropy at Indiana University, Peter Hudson, CEO, Lord Mayor's Charitable Fund and Steve Alley, Director, Community Foundations Institute.*

"I was delighted and privileged to have been selected for the course and to have the opportunity of working with representatives from 60 community foundations around the world" Peter Hudson said.

"The Lord Mayor's Charitable Fund's – Melbourne Foundation's capital assets has grown from around \$4 million to more than \$13 million over the past five years. The course provided an excellent opportunity to gain further knowledge and insight into new trends as well as develop new skills and further networks that will help in the Fund's further development" he said.

"The program included a variety of components covering, foundation structure, governance, resource development and donor relations, grant making, community leadership, stewardship and accountability along with fiduciary responsibilities. The course was challenging and highly-interactive with significant involvement of group dynamics and provided a great insight into the operations of community foundations in the US. Knowledge gained from the course will be most useful in furthering the development of the Fund's – Melbourne Foundation" Peter Hudson said.

## Philanthropy in a start-up world: Profile of Silicon Valley Community foundation's president

Peter de Courcey Hero is constantly finding new ways to link the wealth and energy of young entrepreneurs in Silicon Valley with the needs of their community.

He visited Australia in early April to share his experiences and insights.

Hero has been President of the Silicon Valley Community Foundation since 1989. The foundation has total assets of \$560 million, and made grants of over \$48 million in the last year. Its programs focus on neighbourhood revitalisation, early childhood literacy, and broadening cultural participation.

He has worked in government, in corporate marketing, and he holds an MBA from Stanford University, an MA in Art History, and an (Honorary) Doctor of Laws from the Maine College of Art. In 1991, then President George Bush appointed Mr Hero to a six-year term on the National Council of the Arts.

Under Peter Hero's leadership, the Silicon Valley Community Foundation has developed a highly successful one-stop service centre for new donors in this remarkable region of 'young tech wealth'. Each donor is assigned to a foundation staff member, something like a private banker. The foundation provides research and regular studies on various community organisations, on charities' effectiveness, on corporate giving – offering the sort of benchmarks that entrepreneurs can really relate to.

Peter Hero also helps new donors develop a philanthropy 'strategy', urging them to build a diverse giving 'portfolio' by directing some of their money to well-established non-profits; some to the foundation-directed 'field of interest' pools; and some to cutting-edge programs. Peter Hero talks to CEOs in market language, about how a corporate philanthropic program can even help employee recruitment and retention.

Silicon Valley has more than its fair share of multi-millionaires and billionaires, many of them aged under 40. Yet, the region also has plenty of social problems, and the challenge for the community foundation is to make productive connections between the high-flying new donors, and work that really needs to be done.

"There's not a lot of understanding of where the needs are", Peter Hero admits. Even Bill Gates pointedly told a recent conference in Seattle that technology isn't high on the priority list for people who don't have enough to eat.

Technology companies still provide half of their corporate giving in the form of computers and software. While most non-profits are glad to have computers, many can't hire IT staff to keep them running. To deal with that problem, the foundation is trying to set up a network of volunteer IT consultants who can service the equipment.

One of Peter Hero's priorities is to try to prevent high living costs from turning Silicon Valley into a gated community for the super wealthy. "We're in danger of becoming a community of rich people and their servants", Mr Hero said. Already government agencies have to subsidise housing costs in the area for police officers and public school teachers. A recent SVCF grant will pay apartment deposits for dancers with a local ballet company.

In the Valley's Mayfair neighbourhood of East San Jose, a low-income mostly Hispanic community of 6,500 people, the foundation has commenced its most complex and ambitious project.

The 'Mayfair Improvement Initiative' is aimed at permanently upgrading the entire neighbourhood. Projected to involve more than US\$15 million in public and private funding, the initiative involves 76 separate projects, including literacy programs, establishing home day-care centres, conducting health screenings, offering family financial counselling, providing high-tech job training, and building leadership skills. There's even a program to teach fundraising skills, so Mayfair residents will learn how to get private foundation support on their own.

The community foundation is basically the 'project manager' – managing funds, finding donors for particular projects, and overseeing it all. The list of projects and goals was developed by people living in the neighbourhood.

Peter Hero is constantly looking for new ways to expand the foundation's donor ranks. After years of trying to bring busy new tech millionaires through his door, he now goes to them. The foundation has just sent a 'giving counsellor' to work on the grounds of Cisco Systems, a booming corporation of 18,000 employees in Silicon Valley.

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The transcripts of Peter Hero's comments during his visit to Australia will be available shortly on the Philanthropy Australia website: [www.philanthropy.org.au](http://www.philanthropy.org.au)

The foundation has also established a high-profile 'venture philanthropy' group aimed at young donors. The Silicon Valley Social Venture Fund (SV2) has attracted 100 'partners' from the ranks of venture capitalists and entrepreneurs. Each contributes a minimum of US\$2,500 a year, and the money is pooled, and matched with Community Foundation funds to provide grants. The idea is for members to nurture their financial investments with guidance, resources and active participation – just as venture capitalists do. The point is not just the money, but the establishment of a connection between the donors and the recipient organisations. One member of SV2 has described the group as "training wheels for young philanthropists".

Peter Hero identifies a particular factor about wealth in a high tech town. "A quarter of the people working in Silicon Valley are receiving stock as some form of compensation and only 3% are giving stock. There's a vast, untapped pool of resources that's not finding its way into charity". He cites eBay, an early options-giver, as an example of what can happen. "It gave us 100,000 shares before going public, and today those are worth \$40 million", he said. Says Peter Hero, "We need to create a culture where philanthropy becomes a way of life in Silicon Valley. If we don't do that, people will say I can't believe these guys blew it".

Philanthropy acknowledges 'Fortune' on-line 13/11/2000 and the article 'The Man Who Sold Silicon Valley on Giving' by Peter Elkind. ([www.fortune.com/fortune/2000/11/27/sil2.thml](http://www.fortune.com/fortune/2000/11/27/sil2.thml))

Peter Hero will speak at the National Community Foundations Forum in Tasmania on 10-12 April. Call Helen Morris at The Myer Foundation on (03) 9207 3040.

He will also speak to Philanthropy Australia members at meetings in Sydney and Melbourne. For more information, call Philanthropy Australia on (03) 9620 0200 or email: [k.zammit@philanthropy.org.au](mailto:k.zammit@philanthropy.org.au)

## Community foundations for the 21st century

More than 60 representatives from new and established community foundations from around Australia gathered in Tasmania on 10-12 April.

Developed by the foundation for Rural and Regional Renewal (FRRR) with support from Philanthropy Australia, the conference provided a forum for discussion of key topics, including board recruitment and legal issues, innovative fundraising strategies, training opportunities, and involving young people in the management and development of community foundations.

Highlights included the launch of the new Community Foundation Kit for Australian Communities, developed by FRRR in association with Philanthropy Australia, and a keynote address by Peter Hero, Chief Executive of California's Silicon Valley Community Foundations, one of the richest and most innovative of US foundations.

Ben Bodna, Philanthropy Australia's Vice President, chaired a round table group learning and discussion session on current issues in community foundations development.

The conference was held at Freycinet Lodge, Coles Bay, Tasmania. For further information, telephone (03) 9481 5456 or (08) 8390 1849.

An email discussion group linking conference participants, has been established in the wake of the meeting.

"The email discussion group is a great opportunity to continue the fascinating exchanges which began at the conference," said Ben Bodna.

"There is already tremendous expertise in Australia, which new and established community foundations can draw on."

*Even Bill Gates pointedly told a recent conference in Seattle that technology isn't high on the priority list for people who don't have enough to eat.*

# Community Foundation News (continued)

## Mumbulla Foundation officially launched

"The Mumbulla Foundation is poised on the edge of a revolution about to sweep Australia", according to Helen Morris, project director with The Myer Foundation.

Ms Morris officially launched the Mumbulla Foundation in Bega, Southern New South Wales, late last year.

The revolution she referred to was one in which communities started to look after their own, especially communities in rural and regional Australia.

Ms Morris said the establishment of the Mumbulla Foundation was an indirect legacy of the late Sidney Myer. The Sidney Myer Fund was instrumental in the establishment of the Foundation for Rural and Regional Renewal – a mechanism for rural communities to build their own capacity to survive and thrive.

"Sidney Myer was a great believer in community", Ms Morris said. "When he arrived in Australia in 1899 he had no money but began selling goods from a cart in rural Bendigo. The community embraced him and gave him the start of his retailing success.

"Throughout his life he strove to give people the opportunities that others had given him. He did not just give money to charity, he looked behind poverty to address its causes.

In the centenary of Sidney Myer's arrival in Australia, his family celebrated by giving about \$10m to major projects that it was hoped would make a difference in Australia.

Mumbulla is the first community foundation in NSW and only the second rural community foundation in Australia.



*Helen Morris, Eileen Morgan and Heather O'Connor, administrator of the Mumbulla foundation, launch the foundation with the 'cutting of the cake'.*

"It will be the people's foundation run by local people who know what is best for them, unlike many funding bodies who think they know what is best for others", Ms Morris said.

Ms Morris said tax laws were crucial. "Recently there were two major developments which will boost growth in philanthropy. The first is the plan to exempt gifts of property from capital gains tax and secondly, the FRRR was given tax deductibility for gifts toward community social and economic development. Therefore a community foundation will be able to attract donors and spend its income on development, not just charity."

"People have always been generous, but our generation wants to give strategically, to empower people to create change and address the causes of disadvantage. Community foundations give us that opportunity."

Ms Morris paid tribute to Heather O'Connor, the director and administrator of the Mumbulla Foundation.

"Heather is devoted to this region and has enormous faith in the capacity of local people to survive and thrive. She is a person of vision who has been quietly behind many important milestones in rural development and community capacity building".

"Sidney Myer returned part of his estate to the community that enriched him, and so changed the course of history. I am sure the Mumbulla Community Foundation is set to change the future of this region", Ms Morris said.



*Bruce Blackburn, Vice President of the Mumbulla Foundation with local historian Judi Hearn.*

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## Community foundations resource list

A recent addition to Philanthropy Australia's online resources for community foundations is an annotated list of relevant publications which are held in the Resource Centre. The list was compiled for the first national Community Foundations Forum and has now been made available online as part of the Community Foundations Gateway. The online version of the list will be expanded as more publications are added to the growing collection of resources for community foundations.

The list of links to online resources for community foundations has also been expanded and updated to include several new websites and further information about the material available there. Many sites include downloadable publications such as surveys and studies of community foundation operations, sample brochures, and governance documents.

## Community Foundations Gateway

The Community Foundations Gateway serves as a central location for news and information relevant to community foundations in Australia, including links, upcoming events, information from Philanthropy Australia's Resource Centre and contact details. Homepages for Australian community foundations in the early stages of development will also shortly be hosted here. All Australian community foundations are encouraged to use the Community Foundations Gateway to highlight news or events of interest which they would like to see publicised.

The Community Foundations Gateway can be accessed on Philanthropy Australia's website at <http://www.philanthropy.org.au/comm/commfdn.htm>

*All Australian community foundations are encouraged to use the Community Foundations Gateway to highlight news or events of interest which they would like to see publicised.*

# Pat Feilman: Pioneer of Australian Philanthropy

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*Ms Pat Feilman*

It is almost impossible to imagine the world of Australian philanthropy without Patricia Feilman.

She can rightly be called a pioneer in the field of Australian philanthropy and one of its most influential figures. Her name is inextricably linked with the practice of philanthropy and with The Ian Potter Foundation, the organisation of which she was Executive Secretary from its establishment in 1964 and from which she retired in January this year.

During those 36 years the Potter Foundation initiated programs and projects which today are standard social and environmental Australian Government practice and policy. Newer foundations have profited from the example forged by Potter, their staff and trustees influenced by its practices.

Her role as Executive Secretary brought Pat to the centre of some of the most interesting and exciting social and environmental debates of the last 40 odd years and ensured that her influence will far outweigh her tenure as Secretary of The Ian Potter Foundation.

The Chairman of the Potter Governors, Charles Goode, attested to the latter in his speech at a special dinner given in honour of her retirement:

"Over the years the Foundation has developed a number of principles in relation to our giving, many of which have emerged from Pat's approach to her task. These include an emphasis on the young, whether it be disadvantaged youth or travel grants for the talented; on building a fence at the top of the cliff rather than providing an ambulance at the bottom; of backing the individual rather than the project; of supporting excellence; of spreading the grants across a broad spectrum of deserving interests. Pat has encouraged us to be venturesome and innovative. She has made several trips overseas to seek out new programmes. She was alert to new ideas but she did not fall overboard in accepting them and always kept her feet on the ground... I think Pat is an icon in the administration and policy development of philanthropy in Australia".

But it might have been very different. When Pat Feilman arrived in Melbourne in 1956 to enjoy the Olympic games, she was introduced by a contact, Hugh Williamson, then General Manager of ANZ Bank, to two people with whom he thought she might get a job – showbiz entrepreneur Kenn Brodziak, the man who brought the Beatles to Australia, and businessman Ian Potter. The latter offered her a job as an administrative assistant and researcher in his stockbroking firm and the train of events which led her to philanthropy were set in motion.

In 1962/63, Ian Potter began discussions with his solicitors about the establishment of a foundation and in 1964, Pat began work associated with it, while continuing her work in industry research for the firm. In 1967 Ian Potter retired but continued his career as a company director. Pat left the firm also to work for him in his private capacity and to continue to develop the Foundation.

It was the relative isolation in which the Potter staff worked which inspired the establishment of the Australian Association of Philanthropy (now Philanthropy Australia).

"The Association arose out of disappointment that there was little interaction between philanthropic trusts except Myer and Potter with each other. So many trusts were buried within trustee companies.

"So in 1972 we called a group together and about 25 people came. The aim was to increase the level of professionalism, to ensure exposure to what was happening elsewhere".

Around the same time Pat struck out on her own, although she continued to work for the Foundation. Being 'on her own' meant working in real estate administration and then establishing her own business, with plant nurseries in Bulleen and Mitcham, which in turn led to a role as Chair of the Nursery Industries Association. Pat explored further her early love of the environment and nature, an interest which became hugely influential in the 1980s, when she initiated a far-sighted, three year programme in Western Victoria. The program, which demonstrated that both ecologically and economically sustainable farming was feasible, was the forerunner to the Landcare programme.

She finally quit the nurseries about the time she returned full-time to the Foundation, in 1985 – "As a member of the Zoological Society Board, and its Chair from 1987, I couldn't do everything!" – and from then on it was, in her words, "full steam ahead for the next 15 years".

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The Foundation's wide charter meant that it never determined ahead of time what percentage of available funds would be dedicated to certain areas – the money would go where the needs were. The object was to retain flexibility and the Foundation has maintained that position.

"I think it's true to say that in its early years, really until the early 1980s, Potter, like most foundations, operated in a reactive mode.

"Around this time though, we had sufficient money and experience to go out, look around and seek people and organisations with ideas and concepts which represented new approaches to old problems.

It was challenging work. "Governments and bureaucracies had to be persuaded of the benefits of programs like Family First, an intensive, family based program which is now an entrenched program in most states. Ours was a home grown model adapted to translate a US model to suit our cultural environment.

"Australian philanthropy tends still to be re-active rather than pro-active, which largely relates to its size. It's difficult to initiate major programs unless one has a substantial foundation and the smallness of the sector and the small size of foundations inhibits this. Only a few foundations have sufficient staff and resources to seek out the needs of the community and think through ways and means by which we might aid them. It's hard work and takes time. Most programs take years to develop and Potter has been very fortunate that it has the capacity to work in this way.

"Working with other foundations is an important part of Potter's work – it means more thinking and more dollars towards projects. The Riverland SA Bookmark Biosphere Reserve Program, which has been supported at various times by five other Trusts is one such collaborative project".

These days, she believes, a philanthropic trust "couldn't run without specialist help. One is trying to make good decisions, but no one person can have expertise across the fields".

Pat continues her work with conservation through the Australian Landscape Trust and as a trustee of the Norman Wettenhall Foundation and the Australian National Commission for UNESCO. She is also a member of the Council of Governing Members of The Smith Family and the National Gallery of Victoria Foundation.

A self-imposed retirement task is dealing with the Potter Foundation's archives, a project which has led to the re-discovery of much of Sir Ian Potter's speeches, articles and correspondence.

At her farewell dinner, Pat noted the field of interests over which the Potter Foundation has ranged; ecologically sustainable agriculture, with the Potter Farmland Plan; efforts to encourage community participation and education in the recovery of seriously degraded environment in the Murray Darling Basin; early introduction of intensive family based programs for the protection of children at risk of being institutionalised; the FAST program, designed to assist highly stressed families and their children in the school environment; initiatives to help Australian galleries broaden their visitor base and make better use of their permanent collections; research in expanding the development of early childhood literacy; support for internationally recognised scientific and medical research; and commissions for sculptors and composers.

If there is a subject particularly close to her heart, it is the environment.

Dorothy Scott (Pat's successor as Executive Secretary) says it is for its environmental work that The Ian Potter Foundation will be remembered and that's something in which Pat has had a driving hand.

# Dr Dorothy Scott Joins the Ian Potter Foundation

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*Dr Dorothy Scott, OAM.*

Dr Dorothy Scott has been invited by the Ian Potter Foundation to take over the position of Executive Secretary following the retirement of Pat Feilman.

Over the past four years, Dr Scott has worked as a consultant for the Foundation – making recommendations on grant applications, and also developing the Foundation's strategic thinking in social welfare and implementing a model of 'innovate-evaluate-disseminate'.

The University of Melbourne has granted Dr Scott three years leave from her position as Associate Professor in the School of Social Work in order to take up the position of Executive Secretary of The Ian Potter Foundation.

With an academic and professional background in history and social work, Dr Scott's particular areas of interest have been in child and family welfare and maternal and child health. She said she hoped to utilise her knowledge in these areas in her new role, but with a broader focus on community rebuilding.

"I am interested in community development as an essential precondition to facing the major environmental challenges of Australia, and in the arts as a vehicle for building a sense of community and countering alienation of marginalised people, as well as being about fostering and enjoying the creativity of individuals", she said.

Dr Scott has visited a number of philanthropic foundations in the UK and the United States, including those she described as "at the cutting edge of strategic philanthropy".

"The challenges of this position are the same as its sources of satisfaction – coming to terms with the breadth of issues in which the Foundation has an interest: the arts; environment; medical research; health; education and social welfare", Dr Scott said. "It has been an honour to take over from Pat Feilman, who has been central to the enormous achievements of The Ian Potter Foundation.

"It is a privilege to work with a Board of Governors of such exceptional ability and depth of knowledge. The Secretariat is also a lovely group of people who work well together and it is a pleasure to be part of such a team."

"What is so special about The Ian Potter Foundation is not that by Australian standards it is a large philanthropic foundation and therefore has the potential to make an impact in what it does, but also the ethos of the Foundation – taking a longer term perspective on major issues and not being afraid to break new ground. The best example of this is probably the Potter Farmland Plan", Dr Scott said.

After 20 years in academia, Dr Scott describes her new role as a very exciting opportunity. "A well known member of the philanthropic community said when she heard the news 'Congratulations Dorothy, that's the best job in Australia'. I now believe she is right!"

"First as a young social worker in the field and then as an academic I have always had a strong sense of vocation in my work. It looks like I will be just as blessed in this third phase of my career in philanthropy", Dr Scott said.

Dr Scott received the Order of Australia (OAM) in 1999 for contribution to social welfare education and research, and to the development of specialised child abuse services, and services for women suffering from post-partum psychiatric disorders.

She has presented numerous keynote and other papers to international conferences and seminars, is a member of six professional and research bodies, and five advisory bodies. She has written four books, contributed chapters to several other books and has thirty articles published in refereed journals.

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### Curriculum Vitae

|                     |  |
|---------------------|--|
| Name:               | Dr Dorothy Ann Scott   |
| Born:               | Swansea, South Wales, UK   |
| Qualifications:     | Diploma of Social Studies (Melb) 1973<br>Bachelor of Arts (Hons) (Melb) 1976<br>Master of Social Work (Melb) 1987<br>Doctor of Philosophy (Melb) 1995  |
| Previous positions: | 1981-2000 Lecturer, Senior Lecturer and Associate Professor,<br>School of Social Work, University of Melbourne<br><br>1976-1981 Social Worker and Senior Social Worker,<br>Department of Family Psychiatry, Queen Victoria Medical Centre<br>(now Monash Medical Centre)<br><br>1974-1976 Social Worker, Foster Care and Adoption Section,<br>Social Welfare Department (now Department of Human Services) |

*With an academic and professional background in history and social work, Dr Scott's particular areas of interest have been in child and family welfare and maternal and child health.*

# Foundation First Steps

When the Eastern Victoria Community Foundation looked at letting communities in East Gippsland know of its existence, it developed a project with the seven secondary colleges in the region.

## Beginnings

The Eastern Victoria Community Foundation began its communication strategy in a small way, through contact with each of the seven secondary colleges in East Gippsland and involvement with one class of Year 9 and 10 students at each school. Teachers were very generous in their acceptance of the project at Mallacoota, Cann River, Orbost, Lakes Entrance, Swifts Creek, Bairnsdale and Nagle College, also in Bairnsdale.

## School involvement

The reasons for involving schools were several: one of the Foundation's primary aims is 'advancing young people in the region' and we believed that the schools were the best place to start. It was also thought that through students' families and friends, the Foundation would begin to become known locally. Some schools have very low populations, are spread widely geographically and linking the schools in this way offered opportunities for building cross-school relationships. The project offered benefits to students: increased research and interviewing skills, raised civic pride, increased awareness of different careers and the opportunity to be part of a media campaign through their photography and artwork.

The project's name: 'Find Them!' refers to students' search for local people who have made or are making a contribution to the life of the region. The project fits into various parts of the school curriculum. At Mallacoota, a study is being made of the town's annual arts festival, now in its 21st year. Other schools have individual priorities and are fitting the 'Find Them!' project into these.

## Corporate gift

Kodak Australasia was approached to donate single-use cameras so each student could record their interviews and their area in their own way. 135 single-use cameras were given, which are recycled after use. The photographs taken by students will illustrate the media releases about the Foundation, be used on the Foundation's soon to be constructed website and in a publication, celebrating the people of Eastern Victoria, to be launched on the weekend of the Foundation's launch: 22 and 23 June 2001.

## Following on

On June 22nd this year, students involved in 'Find Them!' will gather at Lakes Entrance Secondary College for the launch of the publication featuring their work. They will then spend the rest of the day with local people who work in different fields for small group discussions (up to 10 students in each) about careers. Among those taking part are two architects (father and daughter), people from the tourism and hospitality industry, a former



Year 10, Cann River students with local emergency services personnel.

abalone diver and now a member of parliament, Parks and Wildlife rangers, people involved in different aspects of the fishing industry and a local musician.

## And then

This first project forms what the Foundation hopes to be an ongoing relationship with the schools of the region. With these 135 students, all of whom are about to embark on their senior schooling, there is an opportunity for the Foundation to further develop its assistance, especially in the area of discussion of career choices, mentoring, work experience opportunities and confidence building.

## Local heroes at Cann River

Students at Cann River have decided to feature the people they feel make a great contribution to life in East Gippsland: the volunteers from the Ambulance, State Emergency Service, Red Cross and other organisations. Year 10 teacher Roz Muscat says that the experience is giving students some good marketing and interviewing skills and in the International Year of the Volunteer, making students aware of the generosity of volunteers who give time to help the community. The project at Cann River is part of a local history project and students were involved in all the processes including advertising in the local school newspaper for likely interview subjects.

Goals of the Eastern Victoria Community Foundation:

- Sustainable regional economic and community development;
- The advancement of the region's young people;
- The celebration of local success.

Further project information: Jane Sandilands, Communications Adviser, Eastern Victoria Community Foundation.

Email: sandilands@batemansbay.com  
Enquiries: Eastern Victoria Community Foundation: Jennifer North  
Email: jnorth@gondwanaland.com.au  
Phone/Fax (03) 5156 5722

# Partnership and Activism: Third Sector Research Conference



*Genevieve Timmons*

Genevieve Timmons of Melbourne attended the Fifth National Conference of Australian & New Zealand Third Sector Research, held at the University of West Sydney, Parramatta Campus Sydney, in December 2000. Here is her report.

To introduce the conference, Conference Co-ordinator Rosemary Leonard set the context:

"At a time when many claim that capitalism is the only game in town and the only way to play is competitively, the Third Sector may be a lone voice for civil society. We are, therefore, more important than ever before. To claim our power, we need to understand what the Third Sector is, how it works, why it plays such a vital role and how it might work better.

... If we are confident that the value of our social capital is as great or greater than the financial capital any partner can offer, then we negotiate from a position of strength. If we are not to exhaust ourselves trying to run faster and faster in other people's races, we need to take time out to assess the 'big picture'.

The conference, held every two years, was indeed devoted to the big picture and some of its detail, and allowed the participants to learn, reflect, discuss and commit themselves to a stronger and more vibrant third sector.

Attendance included people from across Australia, as well as New Zealand, Sweden, the Netherlands, Bangladesh, South America, India, Indonesia, Zimbabwe and Mexico.

Highlights were Evelyn Scott (Chairperson, Council for Aboriginal Reconciliation) and Julian Disney (President of the International Council on Social Welfare), both of whom brought a strong and stimulating impact with their keynote addresses.

Marilyn Taylor (Professor of Social Policy, University of Brighton, UK), also provided a breadth of vision and challenges to those present.

As is the nature of a conference, the ripples from discussions and exchanges that went on throughout the four days cannot be captured in one place, especially when people are mixing and matching and disappearing into concurrent forums.

However, this was a great opportunity for those of us who give philanthropic grants to take pause and consider the broad context in which we work, and to address the significant questions which come from the conference agenda. Particularly, how do we view partnership, and what exactly do we mean by it? Do we assume there is a partnership where there is merely an exchange of funds, or do we mean more when we use the term?

"In a period dominated by ambitious claims about the growing importance of the third sector and expectations of partnership arrangements between third sector organisations, the state and business, it is timely to consider the nature and forms of partnership. In public discussion... there is little critical analysis and virtually no discussion of the complexities". Chair of the conference, Dr Sue Kenny.

Another key question is the role for philanthropic grant-makers in supporting activism. Do we see activism as beyond our charitable charter, a term with which we have no association? Or do we see that the most effective assistance for people in need can sometimes be supporting social action, drawing attention to problems and missed opportunities?

Almost fifty papers were presented at the conference, and those to be published will be presented in the ANZTSR Third Sector Review in 2001.

For more information, contact Dr Rose Melville at Sociology Program, University of Wollongong, NSW 2522, email: [rose\\_melville@uow.edu.au](mailto:rose_melville@uow.edu.au); [Jenny.Onyx@uts.edu.au](mailto:Jenny.Onyx@uts.edu.au); or [m oppenheimer@uws.edu.au](mailto:m oppenheimer@uws.edu.au).

# Ethical Investment – Finding Out How

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*Duncan Paterson*

Ethical investment is a powerful tool for social change, according to Duncan Paterson, researcher with the Centre for Australian Ethical Research (CAER).

Mr Paterson was guest speaker at a forum organised by Philanthropy Australia, the Ethical Investment Working Group, and hosted by The Herald and Weekly Times.

CAER was established as a business arm of Australian Ethical Investment Ltd just over 12 months ago, and provides research for a number of clients on over 300 Australian companies, screening for criteria as determined by the clients.

The Centre, based in Canberra, has two full-time staff, and covers all major companies listed on the Australian Stock Exchange, as well as providing information on larger New Zealand companies and other international stocks.

CAER's major client is Australian Ethical Investment Ltd, a funds manager for a number of public trusts and superannuation funds, which invests in a diverse range of environmental and socially responsible investments. Australian Ethical Investment Ltd does not invest in armaments, repressive regimes, tobacco and alcohol production, uranium mining, rainforest or old growth logging, wood chipping, animal exploitation or gambling. Other CAER's clients may require different or more specific screens.

Rather than applying negative screens, CAER may be asked to identify companies on positive grounds, such as use of recycling, renewable energy, co-operative development, eco-tourism and bio-diversity, sustainable timber production, complementary health care, community support, workplace democracy, or animal rights.

"Different people have different ideas about what is ethical. We don't just list companies by one set of criteria – rather we provide a list of areas upon which we can assess companies", Mr Paterson said.

"Investors choose how their criteria are applied, not the researcher. We do not make ethical judgements, but simply apply the criteria of the client to provide as much information as is available", Mr Paterson said.

According to Duncan Paterson, there are three main ways of approaching socially responsible investment: best of sector, ratings and screening.

A 'best of sector' approach allows for an investment portfolio spread across all market sectors, although sometimes the best of a sector may not meet the highest ethical standards.

Ranking involves ordering all available investment opportunities according to specified criteria, which can be a simple, although sometimes oversimplified, method.

Screening offers the most flexible approach, and is the most widely used method of selecting ethical investments, however it requires the client to consider carefully the criteria they require to be applied to research.

CAER provides a similar service to potential ethical investors as the Ethical Investment Research Service (EIRIS) in the United Kingdom. The latter, however, operates as an independent non-government and not-for-profit organisation.

CAER's research methodology is based on the model developed by EIRIS.

"Information is collected from a range of public sources, including Annual Reports, government sources, community groups and NGO's, and the media", Mr Paterson explained.

"Where information is not publicly available, we use questionnaires, or ask companies directly about their internal policies."

Information held by CAER is verified by companies on a regular basis.

According to Mr Paterson, ethical investment is positive for companies seeking investment, and they have an interest in providing disclosure.

"Ethical investors are long-term and loyal investors if their chosen stock conforms to their standards.

"They can serve as an early warning signal to companies of potentially damaging reputation issues, and provide closer engagement between company and shareholder."

# Coalitions and Partnerships

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Sending public servants out to work in community organisations sounds like an almost Mao-ist program of re-education, but it is actually taking place as part of a commitment to building better understanding between government and non-government sectors.

Denise Swift, Victorian State Manager of the Commonwealth Department of Family and Community Services spoke to a recent Members' Forum of Philanthropy Australia about developing 'social coalitions', partnerships, and new ways of working with the community.

With the Department's focus being on families and communities, she said that partnerships and community input were vital. There was an effort within the Department to work more as facilitators and less as experts imposing solutions from above.

Ms Swift said that the community sector now had an opportunity to feed more directly into the policy process, without as many bureaucratic filters, citing examples such as the Youth Homelessness Taskforce, and the Family Law Taskforce which reported directly to the Prime Minister.

As one way of building partnerships and greater empathy between bureaucracy and non-government sector, Ms Swift had helped initiate a program of secondments of senior departmental officers to work with community organisations.

Sylvia Admans was seconded to Philanthropy Australia, and Kylie Bates to Volunteering Australia. The intent of these placements was to build relationships and understanding between the department and the community sector, and to help build skills and capacity. Both officers reported on their experiences, frustrations, and the overall net value of the program to all parties.

Following the three presentations, members raised a number of issues of concern in regards to social coalitions and building partnerships. One member pointed out that the difficulty with the new way of developing policy was knowing who was involved, how they were appointed, who to approach, and how to find out what decisions were being made.

Another member raised the difficulty of bringing business into 'social coalitions', given their commercial rather than philanthropic priorities.

Others reported that there was some confusion amongst charitable trusts and foundations as to what government was funding and whether or not 'partnerships' were a pretext for government withdrawal from certain areas of need. It was said that many foundations were wary of being called upon to act as partners – especially funding partners – for core services. Many saw their role as supporting new and innovative programs, not maintaining mainstream ones.

Ms Swift reported that there was no intention to withdraw from core services. She acknowledged the importance of 'cutting edge' and experimental projects, and said Government wished to involve itself more in supporting this work as well. She agreed there was some blurring of the divisions between government and community/philanthropic sectors, but that this new flexibility offered possibilities of a better way to develop and deliver social policy.

# Business Enterprise and the Non-Government Welfare Sector

Professor Sol Encel of the Social Policy Research Centre at the University of New South Wales recently conducted a survey of the contributions made by business enterprises to non-government agencies. This is a brief summary of the findings.

We sent two mail questionnaire to 150 large Australian companies and subsidiaries of overseas-based companies. After a second mail-out, we had a total of 52 replies (34%). The mail survey was followed up with a number of personal interviews with company officials responsible for administering the disbursement of donations.

Six companies which replied to our survey refused to give details. Their justification was that it was not company policy to participate in research. We found this attitude rather odd, especially as some of the companies involved have well-known logos which featured prominently at sporting and artistic events. Only three companies were prepared to disclose budgetary details. Such reticence is paradoxical, since the information is often available from annual reports and balance sheets.

From the interviews, it would appear that a number of companies are rationalising their philanthropic activities by reducing the number of causes they support, and appointing designated officials to manage their donations. An example is that of BT Funds Management, the successor to BT Australia. The new Australian company has developed its current policy after extensive consultations with their staff. They have restricted themselves to six causes, which they now support on a continuing basis. Their preference is to select relatively obscure and struggling projects, rather than those with a high public profile.

Macquarie Bank, which took over part of the business of the former BT Australia, has established the Macquarie Foundation to regularise its charitable donations policy. Previously, most decisions regarding donations were made by bank executives on an ad hoc basis. The Foundation has drawn up a set of guidelines and procedures to deal with applications for support.

Another interesting case is that of Bayer Australia, which reflects the widespread shift from discretionary giving to a more strategic approach. Before 1997, the various companies in the Bayer group pursued their own policies without any central co-ordination. In that year, the group appointed an official to co-ordinate and plan programs directed toward the environment, research and development, and education. An example of the new approach was support for the Solar and Advanced Technology Boat Race on Lake Burley Griffin, which involved a three-year commitment. In Victoria, there is a current project with the Parks Service, to preserve the wetlands in Westernport Bay.

Another interesting comment arising from our interviews indicated that relationships with non-government welfare bodies are not always harmonious. Several of the people we spoke to criticised the 'arrogance' of some large and well-known welfare agencies, who were said to assume that they 'deserve to be funded', and did not acknowledge the need to make a case.

It is not possible, at this early stage, to assess the significance of initiatives like the tax incentives introduced by the Commonwealth Government, or the Prime Minister's Community Business Partnership. Most of those interviewed took the line that internal company policy would continue to be more important. This should be a fruitful field for further research.

## Survey of business donation – summary of findings

|  |     |
|--|-----|
| Questionnaires distributed                             | 150 |
| Questionnaires returned (34%)                          | 52  |
| Firms with officer responsible for community relations | 44  |
| Staff matching programs                                | 15  |
| Staff time off for voluntary work                      | 13  |
| Refusals   | 6   |
| Budget details supplied                                | 3   |

Some of the material collected for this project is incorporated in the report 'Partnership: A Review' available on the Community Business Partnership website, and in the paper 'Reflections on Partnership' available on Mission Australia's website

This research was made possible by a grant from the National Australia Bank.

# Philanthropy's Place in a New World – Mapping the Territory

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Genevieve Timmons at New Zealand Community Trusts' Conference.

## Keynote Address to the New Zealand Community Trusts' Conference

Genevieve Timmons was invited to present the keynote address to the Community Trusts' Conference, held in Christchurch in February. Here is a summary of her presentation.

*Individual grant makers and the philanthropic sector throughout the world are asking themselves similar questions. Where do we fit in society? What can we do that can't be done by others? What are our guiding principles and mission, and how do we best deliver?*

*The most significant part we can play is that of social investors, providing the social venture capital for the future.*

### Our power and potential

We have the potential to make an enormous difference to the lives of people as a result of our decisions. There is no doubt that philanthropy is a growing and exciting area to be in – it's hard to find a more creative and socially significant area of work. It's natural for us to feel positive about the benefits, of always being welcome, because of the wealth we represent.

But there are also responsibilities to assume and choices to make, to ensure that we realise the greatest potential from the money we manage in trust. If we don't understand our potential, clarify and organise our directions, others will willingly do it for us.

### Philanthropy in civil society

Like civil society itself, philanthropy is being defined in new ways. We have the traditional and newer range of structures, such as operating foundations, community foundations, private family foundations, individual donors, and conversion foundations. We have trustee companies, statutory authorities, and corporate funds.

Philanthropic dollars are a sometimes limited but strategic source of funding for community development and social enhancement. Funding from government is largely directed at service delivery and inevitably linked to votes at the ballot box. Much of corporate giving is necessarily linked to profitability and returns to shareholders. While philanthropic funding is also defined by trust deeds, donor vision and sometimes statutory requirements, these constraints still allow for creativity and substantial social investment which might otherwise not be possible.

The traditional notions of philanthropy based on patronage and gratitude have been steadily breaking down, and the growth of understanding of civil society has spurred this on in recent decades. With this shift has come various terms for newer and emerging forms of philanthropic giving, including progressive philanthropy, community based philanthropy, strategic philanthropy, social venture capital.

Increasingly, contributions are made in the context of creating new social value, based on partnerships where both the philanthropists and the recipients of the funds have a constructive voice in the planning and outcomes of the activity.

Priority is often given to funding for structural change, based on an underlying commitment to an equitable, just and inclusive society. Diversity, dignity and choice are vital to a robust, dynamic society.

There is a growing expectation that foundations and trusts can be more than passive dispensers of funds. How ready and equipped are we to take a place in this new terrain?

### Missions, values and guiding principles

Explicit statements of purpose for individual trusts or foundations can serve to guide staff, trustees, grant recipients and other partners in what the body stands for and what it intends to achieve. They can guide the work at all levels of organisations, serve as a means of testing decision making, deflect applications which are clearly outside the stated purpose, and attract proposals which are consistent with policy and likely to be supported. Most importantly, they attract applicants and potential partners to come forward to help interpret and reinterpret the work of the foundation or trust.

In my experience with the Reichstein Foundation, grant seekers coming forward with proposals which they saw as consistent with our stated mission and principles helped us to continually move forward towards what we were trying to achieve.

# Philanthropy's Place in a New World – Mapping the Territory (cont.)

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## How do you want to operate?

This list suggests some priorities which might need to be tied to a mission, guiding principles or values statement:

- Be willing to take risks and be bold – finding out something doesn't work can be valuable;
- Tackle hard social problems, which governments or business have abandoned;
- Promote professionalism by example;
- Establish and maintain technical systems;
- Build transparent and open processes;
- Give all staff opportunities to learn and develop expertise;
- Invest in research and development;
- Involve grant recipients where possible;
- Promote grant recipients to other funding bodies and policy makers;
- Invest in training, networking and dissemination of information;
- Build capacity by convening people, broadening participation, sharing information;
- Remember that sometimes the best results come from small grants; and
- Be open to the ideas and challenges of supporters and critics.

## Diversify your social investment portfolio

We have a responsibility to take the risks that others cannot or will not take, while also remaining thoughtful custodians of community wealth. We have the wild card money, and can take up the creative and unique place as a result. While others talk about failure, we can trial and pilot projects, look for the lessons in how things develop for better or worse, and how to improve on them in the future. Good economic investments are inevitably made with risk at some points, and the results can be high returns to a portfolio when they are taken with calculation. Social investment strategies are the same.

As strategic social investors, we can provide funds for a number of purposes such as:

- feasibility studies and business plans for new initiatives;
- trialing or piloting an innovative proposal which may or may not succeed;
- modelling a new service delivery approach;
- leveraging funds for groups to use as a start up contribution and sign of endorsement;
- challenge grants;
- technical assistance grants for training, or new technologies;
- loans or start up capital for community enterprise; and
- small grants programs to stimulate new ideas.

## Non-granting strategies for adding value

There are also ways in which we can achieve our mission and purpose that do not involve direct granting. We can play a valuable role when we:

- produce publicity material which highlights the work of organisations we fund;
- advocate on behalf of grant recipients to other funders and policymakers;
- make thoughtful decisions on how we invest our funds;
- convene meetings to discuss and plan around issues of concern; and
- form collaborative partnerships with other organisations.

## Concluding remarks

Managing and distributing philanthropic dollars is a varied task – one requiring technical, professional and management skills, creativity, and most importantly, values and vision.

As philanthropic grant makers we have capacity to do things others can't do, and to understand and take a role in that is not only fulfilling but also a responsibility. Understand and celebrate your power, and gather the tools and information to use it well.

# Member File – The Invergowrie Foundation

The story of The Invergowrie Foundation began in the 1920s.

As Australian society settled back into peacetime, and despite the fact that many young women of this generation remained single (there were, after all, 60,000 Australian war dead), the majority married and many who did not remained with their parents and lived purely domestic lives. Feeding the family and rearing children were regarded as indisputably 'women's work'.

Among the educationalists however, there was considerable interest in raising the status of domestic work and in 1925, the Head Mistresses' Association set up a committee, chaired by Miss Hilda Daniell, principal of Ruyton and the Heads of five other leading independent girls' schools – Lauriston, Rosbercon, Clyde, Stratherne and Queen's to consider the feasibility of setting up a homecraft hostel. Four years later, Lady Somers opened the Hostel in Malvern Road, Toorak for students to be instructed in the art of Cookery, Household Management, Home Hygiene, Child Welfare, Laundry and Needlework.

As with most educational institutions at any time, the hostel's major concern was money, or the lack of it. The first principal, Mrs May Weatherly, admitted with engaging frankness in 1933, "...Last year I spoke of trying to make ends meet and they never would! At the beginning

of this year there was an awful gap, in other words a yawning hiatus". The gap however was not only filled, as she recalled in her Speech Day report by the 'lovely generosity' of an anonymous donor, but some months later the same benefactor, Mr William E. McPherson and his sisters, presented their magnificent family home, 'Invergowrie' to the Head Mistresses' Association for the use of the homecraft hostel. Thus it was in 1934 that the hostel was relocated to 'Invergowrie' in Coppin Grove, Hawthorn.

The new and larger premises made possible the education of full-time students, some of whom were in residence, as well as a number of part-time student. The first of its kind, the hostel provided a course of domestic training for girls under conditions similar to those 'in the natural setting of the home'. Over 2000 students graduated from Invergowrie before the Governors decided to close the hostel in 1973.

In 1992, the Association of Heads of Independents Girls' Schools of Victoria (formerly the Head Mistresses' Association) sold the 'Invergowrie' property and The Invergowrie Foundation was established. The proceeds of that sale have been invested through a Trust and each year moneys are made available for educational purposes, the primary focus being to promote and advance the education of girls and women within Victoria.



*The Invergowrie Estate once home to the philanthropist Sir William McPherson.*

## Member File – The Invergowrie Foundation (continued)

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Given the ever increasing complexity of The Foundation's Activities, Gregor Howie was appointed Executive Officer in 1994.

For seven years, The Invergowrie Foundation has held an annual Oration, delivered by a woman of particular distinction in her chosen field. Speakers have included Dr Germaine Greer, Justice Sally Brown, and General Eva Burrows AC. In 2001 the orator will be Adjunct Professor Joy Murphy. Attracting an audience of students, teachers, parents and members of the wider community, the Oration continues to be an occasion which celebrates innovative ideas and leadership models for the young women who will be a vital part of Australia's future.

The annual grants program was expanded in 2000 to include the area of educational disadvantage. The category specifically focuses on projects which remove some of the barriers to learning and achievement. The Melbourne City Mission, the Society of St Vincent de Paul and the Brotherhood of St Laurence are applying their grants to projects which support the development of study skills, self esteem and confidence as well as strategies to overcome issues and gaps that obstruct education pathways.

Sixteen tertiary scholarships will be awarded this year and include The Invergowrie Foundation-McPherson Family Engineering Scholarship for Women at the University of Melbourne. Young women from rural Victoria benefit from the tertiary college scholarships which provide the opportunity for continuing studies as well as respite from financial pressures.

Grants to schools have enhanced the educational program of primary and secondary students and created new ways to be involved in enrichment activities within and beyond the confines of the classroom. In 2000 for example, assistance to one school in Ballarat enabled two Year 12 students to undertake Maths Enhancement Studies at Monash; one student to undertake specialists ESL classes; three students to be involved in an International Service Project in Thailand; and fifteen students to attend a Study and Performance Tour of Europe. A Gippsland school used its grant to encourage white water rafting expeditions as part of the Duke of Edinburgh Scheme, and at Ivanhoe, Year 8 girls were given hands-on experience in technology including the use of lathes, drills and soldering tools.

The expectations and lifestyles of the 21st century have transformed the domestic ideal of the 1920's, but just as the philosophy of the Invergowrie Homecraft Hostel was placed within the context of educational outcomes, so that tradition is carried forward by The Invergowrie Foundation in 2001.



*Creative Arts – an important role in education and expression.*



*Building confidence and health through sport for girls.*

# Resource Centre News

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## Books

### **International Grantmaking II: An Update on US Foundation Trends**

Foundation Center and Council on Foundations

An update on the 1997 publication *International Grantmaking: A Report on US Foundation Trends*, this edition updates and enlarges upon the findings of the previous report with information on developments in grantmaking during the late 1990s and the current issues facing grantmakers, including the challenges of globalisation.

### **Schizophrenia and other psychoses: translating research into policy and action**

This report is a summary of the papers and discussions from the 20 October 2000 symposium in Canberra, 'Schizophrenia and other psychoses'. Pro Bono, the Australian Directory of Not for Profit Organisations, 2001

## Journals

- Australian Academy of Science Newsletter September – December 2000
- Brotherhood Comment December 2000
- Fondation Roi Baudouin Periodique d'Information no. 45
- Philanthropy in Europe Issue 5 (February 2001)
- Search: recent work of the Joseph Rowntree Foundation, Issue 34, Winter 2000/01
- Third Sector Review (Australian and New Zealand Third Sector Research Limited) Vol. 6, No. 1/2
- Trust & Foundation News – Jan/Feb 2001

## Annual reports

- Association of Charitable Foundations (UK) Annual Review 1999-2000
- Canadian Centre for Philanthropy 2000 Annual Report
- Education Trust Victoria Annual Review 2000
- International Diabetes Institute Annual Report Summary 1999-2000
- Melbourne Newsboys Foundation 107th Annual Report 2000
- The Norman Wettenhall Foundation Fourth Annual Report 2000
- PILCH Annual Report 1999-2000
- St George Foundation 2000 Annual Report
- Southern Family Life Annual Report 1999/2000
- Surf Lifesaving Foundation Annual Report 1999-2000
- United Way Geelong 47th Annual Report 2000
- Victoria Law Foundation Annual Report 2000

## Workshops

Dates for upcoming Australian Directory of Philanthropy workshops are as follows:

### **Melbourne**

Thursday 31st May (10am-12pm)  
Thursday 28th June

### **Adelaide**

Tuesday 15th May

### **Perth**

Wednesday 16th May

### **Sydney**

Tuesday 5th June

### **Brisbane**

Wednesday 6th June

For more information and an order form, see our website at [www.philanthropy.org.au](http://www.philanthropy.org.au) or contact Vanessa Meachen, Resource Centre Officer on telephone (03) 9620 0200 or email [v.meachen@philanthropy.org.au](mailto:v.meachen@philanthropy.org.au).

## Community foundations resource list

An annotated list of publications for community foundations held in the Resource Centre, compiled for the first national Community Foundations Forum, has been made available online as part of the Community Foundations Gateway section of Philanthropy Australia's website: [www.philanthropy.org.au/comm/commfdn.htm](http://www.philanthropy.org.au/comm/commfdn.htm)

This is the first in a series of subject-based reading lists which will be expanded to include other popular and relevant topics of interest to members. This list of links to online resources for community foundations has also been expanded and updated to include several new websites and further information about the material available there.

## New members

We would like to welcome the following new members to our Resource Centre:

- Voluntary Services to Indigenous Communities Foundation
- Lake Eyre Basin Coordinating Group
- Disability Services Australia
- RMIT University – Development Office, Corporate Affairs Group
- Typo Station



# Home and Abroad

## Home conferences

### Council of Intellectual Disability Agencies (Vic) Inc (CIDA) 2001 Conference 'Inclusion – The Next Challenge'

When: 10-11 May, 2001

Where: Melbourne Tennis Centre

Enquiries: CIDA 235 Napier Street, Fitzroy, Vic, 3065

Phone: (03) 8415 0155

Fax: (03) 8415 0166

Email: [cida@bigpond.com.au](mailto:cida@bigpond.com.au)

### European Foundation Centre Foundations for Europe: Building Social Capital – The Social Economy 12th EFC Annual General Assembly and Conference

When: 20-23 May, 2001

Where: Stockholm, Sweden

Enquiries: European Foundation Centre,  
51 rue de la Concorde, Brussels, Belgium

Phone: 0011-32-2-512-8938

Fax: 0011-32-2-512-3265

Email: [efc@efc.be](mailto:efc@efc.be)

Website: <http://www.efc.be/>

## Abroad conferences

### Council on Foundations 52nd Annual Conference

When: 29 April – 2 May, 2001

Where: Philadelphia, PA

Enquiries: Council on Foundations, 1828 L Street,  
NW., Washington 20036-5168

Phone: 0011-1-202-466-6512

Fax: 0015-1-202-785-3926

Email: [confinfo@cof.org](mailto:confinfo@cof.org)

Website: <http://www.cof.org/conferences/index.htm>

### Council on Foundations 17th Fall Conference for Community Foundations

When: 15-17 October, 2001

Where: Vancouver, Canada

Enquiries: Council on Foundations, 1828 L Street,  
NW., Washington 20036-5168

Phone: 0011-1-202-466-6512

Fax: 0015-1-202-785-3926

Email: [confinfo@cof.org](mailto:confinfo@cof.org)

Website: <http://www.cof.org/conferences/index.htm>

### IAP2: Radical to Rational... and Back Again International Association for Public Participation Conference

When: 5-9 May, 2001

Where: The Coast Plaza Hotel at Stanley Park,  
Vancouver, British Columbia, Canada

Enquiries: IAP2, PO Box 10146, Alexandria,  
VA 22310, USA

Phone: 0011-1-703-971-0090

Fax: 0015-1-703-971-0006

Email: [iap2hq@iap2.org](mailto:iap2hq@iap2.org)

Website: <http://www.iap2.org/conferences/index.htm>

# Philanthropy Australia Inc – Members

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# Philanthropy Australia Inc – Members (continued)

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Victorian Health Promotion Foundation  
Victorian Medical Benevolent Association  
Victorian Womens Trust Ltd  
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Westpac Banking Corporation  
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The Norman Wettenhall Foundation  
The Hugh Williamson Foundation

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Microsearch Foundation  
Mission Australia  
Monash University  
National Heart Foundation of Australia

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The Northcott Society  
Royal Botanic Gardens Melbourne  
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The State Library of Victoria Foundation  
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University of Western Australia  
Variety Clubs of Australia  
Victoria University of Technology Foundation  
Vision Australia Foundation  
Zoological Parks and Gardens Board

## International Members

Himalaya Foundation (Taiwan)

## International Links

Philanthropy Australia maintains ongoing links with the following associations of grantmakers around the world:

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

## Pro Bono Support

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

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