

Philanthropy

Winter 2001 – Issue 46

Feature: The Stegley Foundation
Strengthening Local Communities 1973-2001



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



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Front Cover: Highlighting three priority areas of the Stegley Foundation:
Supporting Aboriginal communities; People with disabilities: Women's
involvement in public and community life.

Sonja Hodge, trainee conservator with the State Library of Victoria, uses
her skills to conserve images of Aboriginal people in the Library's Picture
Collection (1994). Photo by Adrian Flint.

Rae Higman, candidate in the 2000 local government elections in the City
of Frankston – on the campaign trail (1990). Photo by Ponch Hawkes.

Arts Access Integrated Performance Project of Professional Arts Training for
People with Disabilities (1990). Photo by Collin Boggars.

Joint Editors: Carole Fabian and Elizabeth Cham
Co-ordinators: Kerrie Zammit, Grant Hooper and Ruth Jones

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From the President



This is a special year in Australian philanthropy.

Nearly 30 years ago, in 1993, the Stegley Foundation was established by the late Brian and Shelagh Stegley. The Foundation was always intended to have a limited life and is shortly to close. In this edition of *Philanthropy*, we pay tribute to the extraordinary and valuable contribution made by the Foundation and highlight some of its many achievements. I know the Australian philanthropic community will join me in feeling

pride and satisfaction in its achievements – and sad that this visionary and progressive foundation will no longer form part of our community.

Recently, many of us celebrated the 50th anniversary of the establishment of the Helen M Schutt Trust (now Helen Macpherson Smith Trust). Over the last half a century, its broad ranging interests have included higher education, aged care services in rural Victoria, arts and culture, public health, medical research and social welfare, particularly for people with disabilities and frail, aged people.

The two events – the closure of the Stegley Foundation and the half century celebration of the Schutt Trust are a reminder of the richness of Australian philanthropy. I hope they will encourage all of us, staff and trustees, working in the sector to reflect on the extraordinary opportunity available to us – the opportunity to contribute to a better, and more just Australian society.

A handwritten signature in cursive script that reads "Lady Southey".

Lady Southey
President

From the National Director



Lady Southey re-elected President

I'm very pleased that Lady Southey, recently re-elected to the Council of Philanthropy Australia, has accepted another term as President.

We welcome Dur-e Dara as Vice President, replacing Ben Bodna, who remains on Council as the Appointed Member. We are fortunate that we will be able to continue to benefit from Ben's wisdom and expertise. Dur-e is well known as a philanthropic activist, businessperson and restaurateur.

Tom Healy and Jan Cochrane-Harry have been re-elected to Council and Tom will continue as Treasurer. We have a strong and committed Council, determined to ensure our membership plays a key role in promoting the growth of philanthropy nationally.

Inspirational journey

The 2001 AGM guest speaker, Camilla Cowley, gave an inspirational address, detailing her journey towards reconciliation with the original tribal owners of the land now farmed by her family. Camilla's powerful address resonated strongly with her audience, many of whom have funded initiatives designed to support Indigenous people.

WINGS

Plans are under way for the WINGS (Worldwide Support for Grantmaker Initiatives) conference, scheduled for Sydney, March 2002. The conference program is designed to assist grantmaker organisations to better support and service their members. We will shortly be communicating with members, to progress their involvement in this conference. Community foundations will be an important element within the program.

International speaker

Stuart Etherington, Chief Executive Officer of the UK's National Council for Voluntary Organisations, will speak in Perth, Sydney and Melbourne in late July and early August. His analysis of British charities law and its impact upon the voluntary sector should not be missed.

A handwritten signature in cursive script that reads "Elizabeth Cham".

Elizabeth Cham
National Director

Website update

Through the generosity of a grant from Dame Elisabeth Murdoch, Philanthropy Australia is redeveloping its Website and Resource Centre. The redevelopment of the website is well under way, with the first phase of the new site, incorporating a redesign of appearance, structure and content, expected to be unveiled in late July 2001.

New features will include a series of themed fact sheets, expansion of our research and consultancy services, expanded list of links to other sites and a calendar of events. Future plans for the site include e-commerce capability, a searchable online version of the Australian Directory of Philanthropy, a searchable online Resource Centre catalogue and a members only Members' Discussion Forum. We expect these features to be available by the end of this year.

Feedback is welcome and should be directed to Louise Arkles. Email: l.arkles@philanthropy.org.au

Affinity Groups update

Philanthropy Australia, in consultation with its members has established two new affinity groups: Disability Services and Early Intervention.

These affinity groups have the following common purposes:

- To provide a forum for foundations to discuss different policies and approaches;
- To listen to people with expertise or key policy roles relating to the specific area of interest;
- To build a knowledge base of philanthropy and the specific area of interest.

The Disability Affinity Group is also establishing criteria and identifying model projects that it can present to Philanthropy Australia members for their consideration. It has appointed a steering committee to identify ambitions and innovative projects that members may consider funding individually jointly. These will be presented at a meeting in August.

The Early Intervention Affinity Group had its inaugural meeting in late June. Approximately 25 Philanthropy Australia members came together to discuss the meaning of 'early intervention' and the work each is doing in the field. Associate Professor Ann Sanson of the Australian Institute of Family Studies spoke to the group.

The next meeting of the Early Intervention Affinity Group will be held on 13 September, with the theme 'An overview of early intervention initiatives in Australia – Research and Practice'.

Introducing Grant Hooper: Philanthropy Australia's new Membership Services Officer

Prior to joining Philanthropy Australia, Grant Hooper was the Membership Services Coordinator for the Geelong Football Club from March 1998 to April 2001.

Grant holds a Bachelor of Commerce degree from Monash University and a Graduate Diploma of Sport Management from Deakin University.

The Geelong Football Club, is a non profit, membership organisation, competing in the Australian Football League, with a broad membership base of some 26,000 members.

As Philanthropy Australia's Membership Services Officer, Grant will have a specific focus of continuing to improve upon the range and standard of services and products that Philanthropy Australia offers to its members.

He looks forward to the challenges ahead and to meeting as many members as possible. Grant can be contacted by phone on (03) 9612 9030 or by e-mail at g.hooper@philanthropy.org.au

Community Business Partnership news

The Prime Minister's Community Business Partnership is contributing to a report from the Allen Consulting Group that will examine Triple Bottom Line (TBL) issues in Australia.

This report, scheduled for release in September, will examine the 'how' and 'why' of TBL measurement and reporting.

Other organisations and businesses contributing to the report include: Cisco Systems, the Business Council of Australia, Westpac, Environment Australia, The Body Shop, The Department of Industry Science and Resources and Shell.

The partnership has contracted the Australian Bureau of Statistics to collect data on business generosity.

It will be the first comprehensive survey of this type and will provide some much-needed accurate data on the subject. The facts and figures will be collected in the 2001 Economic Wide Activity Survey and will be released mid 2002.

Further information can be obtained from the Prime Minister's Community Business Partnership website at www.partnership.zip.com.au/home.html

Youth participation in action

The Foundation for Young Australians (FYA) has demonstrated a commitment to youth participation, consultation and partnership which has culminated in the development of a comprehensive three year youth participation strategy to which the foundation has committed \$300,000.

As part of the youth participation strategy, the FYA and The Human Rights Council of Australia (HRCA) are collaborating to sponsor a delegation of four young Australians to participate at the World Conference against Racism, Racial Discrimination, Xenophobia and Related Intolerance. The conference will be held in Durban, South Africa from August 28 to September 7, 2001.

The UN General Assembly decided in 1997 to convene a World Conference as a landmark event in the worldwide struggle to eradicate all forms of racism. It is intended that the World Conference will be action-oriented and will focus on practical steps to eradicate racism, including measures of prevention, education and protection. It will also endeavour to provide effective remedies for the victims of racism and racial discrimination.

The conference provides a unique and valuable opportunity for Australians, particularly young Australians, to learn more about this issue from an international perspective and bring back practical and tangible solutions for combating racism in Australia.

The FYA publicised the opportunity in April 2001 to young people aged 18 to 30 who were interested in being part of the delegation and currently involved in an organisation dedicated to human rights and the eradication of racial discrimination.

More than 50 young people from around the country applied to be part of the delegation. The standard of applications was extremely high and the experience and dedication of applicants made the selection process challenging. The successful candidates, all of whom demonstrated a strong commitment to human rights through both their employment and voluntary associations, were as follows:

- Tirana Hassan, Goodwood, SA, Founder/Convenor, Cross Cultural Links; Youth Affairs Council of SA.
- Joe Hedger, Petersham, NSW, Aboriginal Youth Development Officer at Youth Action and Policy Association.
- Sanushka Mudaliar, Strathfield, NSW, Logistic Manager for Oxfam-Community Aid Abroad's International Youth Parliament.
- Marc Tutaan, Narellan Vale, NSW, Convenor of Amnesty International's NSW Refugee Team.

In addition to the conference, delegates will attend an associated NGO Forum and a Youth Summit. The Youth Summit will provide a forum at which more than 200 young adults, representing all geographical regions, will gather to discuss issues of particular concern to them in relation to the struggle against racism.

The four delegates will be accompanied by a representative from both the FYA and HRCA, who will act as facilitators and mentors. HRCA will be conducting a pre-departure workshop to prepare delegates for the systems, procedures and structures of the UN and a UN World Conference.

Each delegate is expected to prepare a strategic plan based on the recommendations and strategies discussed at the conference. Upon return, delegates will be assisted in the development and implementation of their strategic plans so what they have observed, learned and discussed can be implemented in an Australian context.

For further information contact Anna Sale at the FYA on (02) 9357 2344 or anna.sale@syd.youngaustralians.org



Chris Momot

New Executive Officer for Reichstein

Melbourne's Lance Reichstein Foundation has appointed Chris Momot as its new Executive Officer.

Chris succeeds Genevieve Timmons, Executive Officer for the previous 12 years, who has moved into private consulting. She has qualifications in Community Development, Mediation and Workplace Training.

Chris has a long history of working in the community sector, starting in 1982 as a volunteer at the Deer Park Community Information Centre (now Brimbank Community Centre).

Chris became the Centre Co-ordinator/Community Development worker in 1984 when the service had two part time staff. By the time she resigned as Centre Coordinator in 1996, there was a staff team of 63 (paid and unpaid workers). Chris remained at the Brimbank Community Centre as a community development worker until 1999, working on projects that focussed on corrections, family violence, victims of crime and children.

Following this, Chris managed the Statewide Women's Community Housing Service (SWCHS) which works with homeless and at risk women and their children.

She can be contacted on (03) 9650 4400 or cmomot@vicnet.net.au

FRRR announces new appointment

Sylvia Admans has been appointed Chief Executive Officer of the Foundation for Rural and Regional Renewal (FRRR).

Until recently Manager of Charitable Services at ANZ Trustees, Sylvia has a background in local and federal government, the community and private sectors. From October 1999 to September 2001 she was seconded to Philanthropy Australia, where she worked as an adviser, developing its Community Foundations' business plan.

FRRR was established as an initiative of the Sidney Myer Fund, with the federal Government through the Department of Transport and Regional Services. It aims

to encourage innovative collaboration between business, community and government in philanthropic endeavours that will boost the economic and social stocks of regional Australia, with an emphasis on economic development and job creation. The Foundation has now allocated \$1 million on projects and community foundations for the benefit of rural and regional Australians.

Philanthropy Australia National Director Elizabeth Cham said that Sylvia had made a tremendous contribution in the area of community based philanthropy during her secondment to Philanthropy Australia.

Council on Foundations Conference Philadelphia, USA

At least three Australian delegates attended the 52nd Council on Foundations Conference, held in Philadelphia in April: Ricci Swart (dotPhilanthropy), Andrew Blode (Chief Executive of the Jack & Robert Smorgon Families Foundation) and Ruth Jones (Philanthropy Australia).

This year over 2000 delegates participated in the Conference, the majority from US foundations, but also including those from the UK, Canada, Europe and Kenya.

The theme of the five-day conference was 'Preserving the Public Trust, Responsible use of Private Wealth for Public Good'.

Key issues that were addressed included:

- Accountability and evaluation for foundations;
- Strategic philanthropy;
- Collaboration – between grantmakers and with the business sector;
- Stimulating new young philanthropists;
- IT and its role in the sector.

Speakers included Anna Faith Jones from the Boston Foundation who won this year's Distinguished Grantmakers Award, Craig McGarvey of the James Irvine Foundation and the conference highlight, United Nations Secretary General Kofi Annan who spoke on the devastating effect AIDS and HIV are having on African communities.

Ricci Swart said she valued the opportunity to catch up with progress in IT implementation in the sector, have first hand discussion with practitioners, and examine case studies outcomes, which allowed her to return with many new ideas to share with colleagues in Australia.

Andrew Blode found some of the site visits of interest, and valued the opportunities for networking, however came away with the impression that "despite our size, the Australian trusts and foundations can be very proud with our achievements thus far".



Bill Lawson of the Beacon Foundation.

The Beacon Foundation

The Beacon Foundation is a 'not for profit' independent registered charitable trust (PBI) established in Tasmania in 1988. It is dedicated to the single issue of youth unemployment.

The Beacon Foundation seeks to understand the issue from all viewpoints including causes and effects, and has identified some key points about youth unemployment:

- Insufficient jobs to go around is a reality and should be faced, not denied;
- Unfunded work abounds and is one of the keys to resolution of youth unemployment;
- Reassignment of government funds represents a means by which such work can be funded;
- Real work provides dignity. The links between youth unemployment and youth lawlessness and suicide are irrefutable. The work opportunities we give our young people need to be real (real jobs with real employers) in order to build self-respect and dignity. We must stop 'entertaining' them and keeping them off the streets;
- Work and education are linked and must be more connected;
- Career pathways must be linked to training in a transparent manner. Training for its own sake is demoralising and demeaning;
- Projects, not programs, should be pursued, as these do not plan to stop after the funding ceases. Labour Market Programs should be used to establish projects with a focus on real jobs continuing after funding ceases;
- Local ownership of youth employment is vital.

The Beacon Foundation develops original and innovative initiatives seeking to address youth unemployment from a basis of understanding the underlying 'causes'. Beacon then seeks to demonstrate the project in a transparent manner. Independent funding for program or project demonstrations is accessed before moving to the 'demonstration phase'. Beacon is thus a 'demonstrator' but not a 'service provider'.

Once a demonstration project or a program is completed, its results are openly reported noting both its 'credits' and 'debts'. If a project or program is a significant success, Beacon seeks to put it into a template or kit form suited to replication by others.

Since its inception, Beacon has undertaken six such projects and programs, two in progress as at June 2001, and nine currently in planning.

The Beacon Foundation's work to date has been confined to Tasmania. A national Beacon Network is being established in 6 to 8 regional locations across Australia through which the proven templates will be disseminated nationally.

Further information: www.beaconfoundation.net

Helen M Schutt Trust renamed

At a special 50th anniversary celebration in April, Trustees Darvell Hutchinson and Barry Hutchins announced that from July 1, the Trust would be known as the Helen Macpherson Smith Trust.

The name change reflects the fact that it was Helen Macpherson Smith's personal fortune, (not that of her husband, Mr Justice Schutt), which she dedicated to future generations of Victorians.

Philanthropy Australia President Lady Southey acknowledged the tremendous contribution made by the Trust during its 50 year history, in her address to members at this year's Philanthropy Australia Annual General Meeting.

"Through her estate, Helen Schutt has supported thousands within the Victorian community, through diverse and innovative philanthropy. In this last decade alone, the trust made grants of more than \$20 million", said Lady Southey.

Some \$5 million will be distributed in special grants to celebrate the 50th anniversary.

The life of Helen Macpherson Smith has been documented in a lively account, published by the trust. Copies are available from Philanthropy Australia and the Helen Macpherson Smith Trust.



Community Foundations for the 21st century: Forum report

The second annual Community Foundation Forum, hosted by the Foundation for Rural and Regional Renewal (FRRR), was held in April at Freycinet Lodge, Tasmania. More than 60 delegates from Australia and New Zealand attended the event, providing very positive feedback about their experiences. The participants enjoyed learning more about the nuts and bolts of developing a community foundation, while drawing inspiration from the experiences of others. The initiatives of the Community Foundation Silicon Valley (CFSV) were a particular highlight, providing an insight into creating partnerships and involving new philanthropists in the community.

Peter Hero, CEO of CFSV, was the guest speaker at the Forum. The CFSV has assets totalling \$600 million and gave charitable grants of over \$51 million last year. Peter spoke about the relationships that the CFSV have developed with some of the newly wealthy IT entrepreneurs. For example, The Steven and Michele Kirsch Foundation, a supporting foundation of CFSV, recently announced Community, Environmental and Political Reform and Global Themes Grants totalling \$863,000 to 20 non-profit organisations. CFSV also engages in some innovative projects in the Silicon Valley community, including a \$20 million Housing Trust Fund that is demonstrating new approaches to the region's housing crisis.

The speakers from Australian community foundations and support organisations were also full of creative ideas. Jane Sandilands, Communications Adviser to the Eastern Victorian Community Foundation, spoke about the 'Find Them!' project. The project involves students searching for local people who have made or who are making a contribution to the life of the region. The project fits into various parts of the school curriculum and is supported by Year 9 and 10 students from seven secondary colleges in East Gippsland. At Mallacoota, for example, a study is being made of the town's annual arts festival, now in its 21st year. The Find Them! project offers many 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. Kodak Australasia sponsored the project, donating 135 single-use cameras for students to use in recording their interviews and research. The photographs taken by students will be used to illustrate the Foundation's media releases, as well as being included on the Foundation's soon-to-be constructed website and in a publication celebrating the people of Eastern Victoria.



Peter Kenyon



Peter Hero

Another area of great interest to the Forum participants was the development of the corpus or endowment of a community foundation. Andrew Lawson of the Geelong Community Foundation spoke of working in this area with solicitors and accountants. He also discussed the careful development of a relationship with their first major donor who gave \$2 million to the Foundation. The establishment of an unusual sub fund within the Tasmanian Community Foundation, supporting a specific environmental area in the state, was also described. Professor Nigel Forteach, well known in Tasmania for an innovative seahorse breeding program, spoke about the development of the Fisheries Habitat Fund.

FRRR is committed to supporting the development of community foundations in rural and regional Australia because of their capacity to act as agents of community and economic development. The work of both the Mumbulla Community Foundation (led by Heather O'Connor) and the Tasmanian Community Foundation (led by Scott Marshall) in their small community grants programs has shown a great depth of insight into the potential for community foundations to act as leaders and catalysts in regional communities. The Mumbulla Community Foundation was able to match the \$30,000 provided by FRRR with the Bega Shire Community Grant Program, resulting in a more efficient and larger grantmaking mechanism than in previous years. Youth employment and support have been identified as the areas of greatest need in the Bega Shire.

The benefits of youth involvement in community foundations were reiterated several times during the Forum. Peter Kenyon, a leading community development consultant in rural Australia, and a project partner with FRRR on a number of youth initiatives, spoke about the importance of involving young people in the work of a community foundation. In addition, The Community Foundation Kit, which was launched at the Forum, contains sections on youth involvement (and on all aspects of starting and developing a community foundation). It was also noted that many overseas community foundations have Youth Committees that are responsible for fundraising and grantmaking in their areas.

Philanthropy Australia hosted a round table discussion moderated by Ben Bodna. Representatives from several Australian and New Zealand community foundations spoke about their experiences and the major challenges ahead. Key issues that emerged were the need for several years of seed funding to get a community foundation off the ground and the complexity of creating partnerships with business. It was especially interesting to hear from some of the New Zealand participants: Tim McMains (The Tindall Foundation), Jennifer Gill (Wellington Regional Community Foundation) and Hemi Toia. Given that 15 copies of the Kit have already been sold to New Zealand, the trans-Tasman connection seems to be of great value to both countries!

The Community Foundation Kit, building stronger Australian communities, is available from both Philanthropy Australia and the FRRR (www.frrr.netconnect.com.au) and costs \$90 (plus GST). The Kit was developed as a joint initiative of PA and FRRR and written and edited by Catherine Brown. Community Foundations of Canada provided useful material that was incorporated where relevant to the Australian situation. Two videos of the Forum are currently being edited and should be available shortly from FRRR. One will cover the keynote addresses and the other case studies from community foundations.

FRRR would like to thank Scott Marshall, Executive Officer of the Tasmanian Community Foundation, who assisted with the Forum arrangements, including a welcome ceremony presented by some of the local indigenous community. Two of the young performers who presented a beautiful brolga dance are being funded by the Community Foundation Silicon Valley to travel to the US. In addition, Alice Macdougall from Freehills deserves special thanks for her ongoing work assisting community foundations and her very helpful presentation on legal and tax issues.

Next year's Community Foundation Forum will be held in the Blue Mountains on March 14 and 15, following the international WINGS Conference in Sydney which is being hosted by Philanthropy Australia.

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Opening ceremony.



As part of Philanthropy Australia's commitment to fostering the growth of community foundations, Philanthropy is featuring the stories of individual foundations around the country. Any community foundation, established, developing or beginning, is invited to submit their story to these pages.

Geelong Community Foundation – off to a flying start

The initiative

The idea of forming the Geelong Community Foundation (GCF) came from United Way Geelong. Early in the 1950s, a member of the Geelong Apex Club returned from USA with a recommendation that a Community Chest be formed in Geelong. In 1954, the Geelong Community Chest was the first of its kind in Australia.

Since then, the organisation, now called United Way Geelong, has raised millions of dollars for Geelong charities. The annual appeal raises about \$1.5 million a year, which is distributed to over fifty beneficiary organisations.

In 1988, the Board of United Way appointed a steering committee to assess the feasibility of forming a community foundation in Geelong. A foundation could focus on projects outside the scope of the organisations supported by United Way.

Steering committee

Members of the steering committee, headed by Geoff Neilson, a local chartered accountant, discussed how a community foundation would operate in the Geelong region, and then tested their ideas on a wide variety of Geelong decision makers and welfare organisations. Enough support was forthcoming for a public meeting to be convened.

The then Mayor of the City of Greater Geelong, Cr Ken Jarvis, convened a meeting at the City Hall. Hayden Raysmith (Melbourne Community Foundation), Geoff Neilson and Ken Jarvis spoke, and the meeting voted unanimously to proceed with the proposal.

Board of directors

As it had been decided that the region to be covered would comprise the municipalities of Greater Geelong, Queenscliff, SurfCoast and Golden Plains, directors were selected from across the whole region. The criterion was community respect and trust.

The eight people chosen all accepted the invitation.

The board comprised an accountant, a lawyer, a public relations consultant, a former librarian, two businessmen, and two people well known for their community service. Three were female. Two were municipal councillors – one from Greater Geelong, the other from Queenscliff. One was a former President of United Way, another a former Chairman of Red Cross in the region. Four had been honoured with membership of The Order of Australia and all were well known for their community service.

A company limited by guarantee was formed – Geelong Community Foundation Limited.

Trust deed

The next task was to prepare a trust deed and have it approved by the Australian Taxation Office. This proved more difficult than expected. John Emerson and Alice McDougall from Freehills were of great help, as they are with many charitable organisations.

John Bannister of local lawyers Price Higgins prepared statutory documents in consultation with Freehills, and his firm undertook a substantial amount of work on a pro bono basis.

The directors were fortunate to secure the part time assistance of Andrew Lawson, a former President and appeal Chairman of United Way Geelong, and well known Geelong businessman. Andrew agreed to work as honorary Executive Officer until GCF was in a position to employ him.

After prolonged negotiations, the trust deed was approved and the application was granted for tax exemption and tax deductibility.

Funding

The Foundation for Rural and Regional Renewal provided a grant of \$44,000 as seed funding, which enabled the Foundation to face its first year with confidence.



Mr Ken Stott

Ken Stott's gift

Geoff Neilson had been discussing with his client, Ken Stott, the idea of setting up a fund for disadvantaged people, and when the GCF was finally established, he proposed that the fund be created within the GCF.

Ken Stott had experienced poverty in his youth and had suffered many setbacks in his own life.

His father, a builder, experienced great financial difficulties during the Great Depression, and Ken knew what it was like to have worn out clothes and insufficient food. To try to be self-sufficient, he worked on newspaper rounds morning and night, caddied at a golf course, and grew vegetables to sell to households.

After landing a job with a builder, he used his talent for drawing to prepare building plans. Other builders sought his help, and he developed a small business.

While Ken was working on a building project at the Ford works in North Geelong, his plans came to the attention of the design staff at Ford. They offered him a job, and Ken worked at Ford for 20 years.

As a young man, he suffered from epilepsy, and gradually this affected his work. When he believed he could no longer perform his duties satisfactorily, he left Ford.

He had begun to accumulate some money by trading in vacant land. This formed a springboard for his later venture into share investments.

Living alone in a modest home unit, Ken proved a prudent investor and accumulated a diverse portfolio of shares. Ken agreed to donate \$2 million to help those who might otherwise lack help as he did in his early life.

Public launch

The Mayor of the City of Greater Geelong, Cr Michael Crutchfield, convened a public meeting at the Geelong City Hall on 14 December 1999. The Mayor publicly thanked Mr Stott for his Christmas present to Geelong.

Development

Since the public launch, the directors have been active in:

- Distributing a brochure to lawyers, accountants and financial planners;
- Adjusting the portfolio of shares donated by Mr Stott, to achieve a more appropriate spread of blue chip shares with components of fixed interest securities and cash deposits;
- Identifying potential donors;
- Establishing an 'open fund' for bequests and donations, the income from which need not be distributed to tax deductible charities;
- Deciding on procedures which will be adopted for each year's allocation of income.

Distributions

In accordance with the conditions laid down by FRRR, GCF advertised its intention to distribute \$25,000 to tax deductible organisations for projects to assist disadvantaged youth.

The directors resolved to support three organisations:

- YWCA for an adventure course for girls who have dropped out of, or are at risk of leaving school;
- MacKillop Family Services to provide a homework centre for schoolchildren without adequate homework support;
- BAYSA (formerly Barwon Association for Youth Support & Accommodation) to provide basic mechanical training for young people at risk of dropping out of school.

The directors increased the distribution to \$28,451 to meet the full cost of these projects.

Without FRRR's help, GCF would not have been able to develop to this point, and the directors are deeply grateful for FRRR's support.

GCF aims to manage at least \$5 million and establish ten funds as its goal in the next few years.

The Stegley Foundation Story: Strengthening Local Communities 1973-2001

THE STEGLEY FOUNDATION

End of an era

This month, one of Australia's most innovative grantmakers will close its doors for good.

The Stegley Foundation, established in 1973 with the intention of lasting for a maximum of thirty years, has become renowned for its commitment to giving a voice to some of the most disenfranchised groups in Victoria, and for its contemporary approach to funding and community building.

Its emphasis has been on projects that assist people with disabilities, Aboriginal communities, disadvantaged women, youth and aged people, and on projects that help people gain information, education, skills and resources to achieve greater self determination and participation in community life.

Established by Brian (Snr) and Shelagh Stegley, shortly before their untimely passing, the Stegley Foundation has been shaped largely by two of their children, Sarah and Brian Stegley, who were in their early 20's when they found themselves as trustees of the fledgling foundation.

More recently, the Trustees haven included Kristin Stegley, and former Equal Opportunities Commissioner, Moira Raynor.

Brian Stegley (Snr)'s father was an immigrant from Denmark, his mother of Irish descent. Brian was a strong critic of war, and when Australia entered the Second World War, he chose to enlist (lying about his age to do so) but very deliberately as a conscientious objector. As a result, he served in a medical capacity, doing his bit to patch up those who were wounded in a war he objected to.

This was a stance that in some ways was reflected by his children in later life as they engaged with the victims not of war, but of rampant capitalism with which they too felt deeply uncomfortable.

After the war, Brian (Snr) established his highly successful business, Stegbar Windows, which was kept busy supplying windows to a city in the midst of a domestic building boom. His wife Shelagh, was also an enterprising businesswoman, having established a number of hair dressing salons in Melbourne and then raising six children. They were both hard working, sociable, fun-loving people who had a strong sense of community and fairness.



Brian Stegley (Snr) and Shelagh Stegley (Founders).

The Stegley family began its formal venture into philanthropy in the early 1970's. Brian Stegley (Snr) established the Stegley Foundation, complete with its own sunset clause. Why he did that is a matter for speculation, since he died suddenly, aged in his early 50s, leaving little information or instructions about his intentions for the Foundation.

Shelagh survived her husband by only two years. She made some grants of her own, but again, was denied the time to fully flesh out the vision she and Brian (Snr) might have had for their giving program. It was left to the nominated trustees, Brian and Sarah Stegley, together with an accountant, to find a way to translate their parents' vision into contemporary reality.

Both Brian and Sarah assumed that their father intended to oversee the Foundation's work in what he expected to be the later years of his life. "I expect he would have maybe set something else up after that, for the next generation to take over, or let them decide what to do next. Unfortunately it never happened," said Brian.

"I think Dad was of the view that to have your name associated with philanthropy in perpetuity, when everyone had forgotten who the heck you were, was fairly meaningless. Obviously he didn't expect to die, who does, but I think he thought, by the time I'm 75, I'll have put a lot more money into this, and then the kids can start their own" said Sarah.

There were practical matters to attend to. The Foundation received around thirty per cent of the estate, significantly in assets. Brian and Sarah determined to sell many of the assets in order to establish a cash corpus for the Foundation. Next came the conundrum of how to disburse grants.

The Stegley Foundation Story: Strengthening Local Communities 1973-2001 (continued)



Shelagh Stegley (Founder) and children 1960.

As both Brian and Sarah point out, their parents were people of their time, and did not use the language or the concepts, such as advocacy, empowerment, inclusion and cultural awareness, that guide Stegley Foundation trustees today.

"They certainly weren't sitting around worrying about injustice in the way that Brian and Moira and Kristin and I do" said Sarah. "It was a different time. Australia was booming, and mum and dad were part of a much more egalitarian society that was making good after the war. Now things are different, we've got a country that is anything but egalitarian."

Brian Stegley said they were guided by what they knew of their parents' passions. His father, in particular, had always been concerned about people with disabilities, and in his lifetime would attend picnics organised for and with disabled groups. Sarah too, recalled that both her parents worried about the welfare of disabled adults with aging parents.

"All we had to go on, literally, were scraps of paper left with the accountant" said Brian.

"We were kids basically, I was 25 and Brian was 23, we'd lost both our parents, and we had to somehow interpret what 'philanthropy' meant to our parents" said Sarah.

Brian and Sarah Stegley both feel reasonably confident that their contemporary, cutting edge approach to social justice is an accurate translation of their parents' concerns as expressed through the context of 1950's and 60's Australian society.

"We had to look at the social setting at the time of my parents' passing. That was the challenge" said Brian. "Yes, they were a different generation, but given their dynamism and creativity, I think they would have kept up with the enormous social change we have witnessed, and would have probably funded in a similar vein to what we have chosen to do" Brian said.

While never actually choosing to become philanthropists, both Brian and Sarah Stegley clearly have a strong commitment to social justice, and to fulfilling their task with great commitment.

"I am not a philanthropist, I am a trustee," Brian said. "I adored my parents, and it's very easy within that type of emotional setting to be responsive to something that they'd asked of me."

"My late parents demonstrated emphatically that not only does charity begin at home, but to their minds, home is also the Victorian community."

After making a few grants through the late 1970's and early 1980's, the young trustees decided it was important to get some professional assistance. In 1981, the Stegley Foundation employed its first research officer, John Pullicino. John was a lawyer who had previously been involved in the Disability Resource Centre, and was himself paraplegic.

"At that time, the disability sector was undergoing enormous change. John was well versed in what the issues were, and he was able to keep us at the cutting edge of what was happening" said Brian.

John Pullicino worked with the Stegley Foundation for five years. At the time of his departure, the trustees undertook their first formal review, which led to a slight change of emphasis, and the appointment of a new Research Officer, Fiona Moore, who had a community arts background.

"Those five or six years were a particularly creative period in the life of the Foundation, I believe" Brian said. "Personally, I became much more aware of the importance of the arts in community life, particularly within the Koori communities."

Another review was conducted in May 1996, leading to what Brian termed "The Local Government Phase," and Trudy Wyse was appointed with the new title of Manager, Community Development, highlighting the more interactive role that the Foundation had determined to take.

After the first practical steps of putting the Foundation on an active footing, Brian and Sarah Stegley spent a great deal of thought and time determining the best way to make grants.

"Some of the hardest issues for us as young people was how to sort out all the different needs that we saw around us. There are so many individuals and groups in need, it was ludicrous to think we could fund them all. And so entered one of the Stegley Foundation's most important words – policies," said Sarah.



Brian Stegley, Trustee.



Sarah Stegley, Trustee.

The Stegley Foundation Story: Strengthening Local Communities 1973-2001 (continued)



Kristin Stegley, Trustee.

"Policies mean you don't operate by way of knee-jerk reaction, or emotional responses to things, as worthy as they might be."

"We had to structure the thing so that saying 'yes' or 'no' made sense. We decided to fund projects that would make a difference beyond one immediate group or location."

Sarah cited the example of a Stegley funded project, which provided radio broadcasting training for a group of Aboriginal women from the Echuca area.

"That helped the wider Koori community in Victoria, because more people gained communication technology skills. It helped the wider white community gain a better understanding through listening to their programs, and it provided the direct benefits to the participants of occupational training."

"That was the kind of project that met our policy objectives to a 'T'. And when we took on these sorts of projects, then we could quite comfortably say 'no' to buses for every little group that asked" Sarah explained.

As most trustees would realise, developing policies from scratch is a difficult task, especially for two young people thrown into grantmaking without much warning.

Both Sarah and Brian credit John Pullicino, the Foundation's first Research Officer, with radicalising their views on the differences between providing services and empowering people.



Moira Rayner, Trustee.

"When an application came in from the Spastic Society, John told them there was no way we would give them money while they didn't have any people with disabilities on their board, or as long as they ran the Miss Victoria contest" Sarah explained.

"Even though Miss Victoria was a very successful fundraiser, imagine how disabled people felt about it, a process which glorified a narrow view of the human ideal. It was John who allowed us to see things like this, through other people's eyes and feelings."

"We had to think all that stuff through. It came through trial and error. And then, having gone through that difficult process, we decided to write a book to help others."

The book '*A Guide to Informed Giving*' was the result, and after several reprints, is still distributed by Philanthropy Australia.

As well as sharing useful advice on establishing and developing a philanthropic foundation through the book, the Stegley Foundation have played an active role in the grantmaking community. The Foundation was a founding member of the Australian Association for Philanthropy (now Philanthropy Australia) and established Women in Philanthropy (now Horizons), a network for sharing information on current social policy and community needs.

The Stegley Foundation has also been strongly committed to working and funding co-operatively, both with other foundations and with individual donors.

"That was a lesson learnt late in the piece, mainly because we knew we were closing, and wanted to make sure there were others who could continue after we'd gone. I wish we had started it sooner" said Sarah.

Sarah notes that it was the inevitability of the Stegley Foundation's closure that led to ensuring the involvement of other donors in board meetings and projects.

"Closure made us think more clearly and keenly about how important the work was that we were doing, and making sure that there was somewhere to go with it after Stegley itself had gone."

Through the involvement with several young and enthusiastic philanthropists, and some of the partnerships the Stegley Foundation has formed with other foundations like the Lance Reichstein and Melbourne Community Foundations, Sarah has come to believe that a greater development of co-funding practices would enhance philanthropy's effectiveness.

Sarah does, however, support individualism amongst trusts and foundations.

"I think it allows you to be yourself, and have a style that attracts certain sorts of applications.

"I remember someone saying to Brian, in a derogatory sort of way, 'I've heard that if you're a disabled woman, just make sure you go to the Stegley Foundation.' Instead of being upset at what was meant as a slight, I said, 'Gee! He forgot to mention Aboriginal!'"

"I think it's good that people know what we stand for. There are foundations who will fund bricks and mortar, and that's good. Stegley are not worried so much about bricks and mortar, but about the processes that go on inside the building. If you were sick and tired of the way governments treat disabled people, if you wanted to establish an advocacy group, then yes, you went to Stegley."

Both Brian and Sarah have mixed feelings about the Foundation's closure.

"Because I live a long way from the city, I am looking forward to retiring from the travel and time commitment. Brian worked out that over the 25 years, we've had about 4,100 trustee meetings, and each of us has only ever missed one" said Sarah.

"But I'm not looking forward to retiring from the wonderful benefit that I've had from being closely involved with social change in Victoria. I'm sure that will continue for me, closer to home. I make the joke that some of those trustees better be careful, because I know where to go to ask for funds for good projects. I'll be on the other side of the fence, roaring!"

Brian said he didn't know how we would feel until the doors were finally shut.

"Every period of your life matters, and I'm not at all convinced that you should be in the philanthropic sector all your life," he said.

Beyond the life of the Stegley Foundation, a number of projects will continue under the care of other dedicated grantmakers and project coordinators. For two of the original trustees, however, the legacy is a sense of learning, satisfaction, and mostly pride at what has been achieved.

"I have a sense of having done a good job" said Sarah.

"And that's the lovely thing about having a foundation with a sunset clause. It's like being given an assignment, with a time limit, and giving it your best shot. I feel we've done that – it's complete, and it's gone. It's like we've raised the baby to a certain level of maturity, and now we know we can trust others, who have learnt how we operate, to take the baby on and nurture it further."

Brian has gained great satisfaction from a number of the projects the Foundation has been involved with, particularly those which helped restore dignity and independence to the lives of people with disabilities, and those which encouraged Koori people to engage in creative and artistic expression.

"My major motivation has been to try to have the groups we've supported and advocated for feel more whole at the end of the process. On many occasions I could sense we had been successful."

In many ways, Brian's work with the Foundation has been an integral part of his broader spiritual journey.

"Beyond capitalism, I think there can be a more enlightened stage, where there can be a fairer and more equitable distribution of scarce resources. Through my involvement in the Foundation all these years, I think in some ways, we have shown that maybe it is possible."

For Sarah, her greatest pride comes from the work done in building a more healthy democracy by giving people a voice and supporting advocacy.

"We've moved away from sticking on band-aids, and got on with empowering people so that we can walk away, and they can keep going. That's Stegley's contribution."

The Stegley Foundation Story: Strengthening Local Communities 1973-2001 (continued)

THE STEGLEY FOUNDATION

A selection of grants

The following is a brief selection of projects funded by the Stegley Foundation over its lifetime, stories in both words and pictures. A complete list of disbursements and project summaries can be found in the Foundation's annual reports, copies of which are kept in Philanthropy Australia's Resource Centre. The final annual report (2000/01) contains a complete listing of all projects funded between 1973 and 2001.

Health Issues Centre (1984)

The Stegley Foundation made a commitment of \$200,000 over three years to help establish this independent health policy analysis and advocacy organisation. The Centre has aimed to create a more equitable health system, and one which is more responsive to consumers, particularly those who are disadvantaged by current arrangements.

The Speak-Up Project: Self Advocacy at Janefield (1989)

Initiated by an autonomous community group based at Janefield Training Centre for people with an intellectual disability. Funding enabled the employment of one full-time support worker and four part-time intellectually disabled resident workers to establish self advocacy processes throughout Janefield.

"To know that we've played a role, however small, in the move to more enlightened policies, to improve the quality of people's lives, it's hard to put a value on that" Brian Stegley said.



Janefield project.

Ilbjerri Aboriginal Theatre Company (1990)

This company was established to provide opportunities for the Victorian Aboriginal community to see their culture and everyday lives reflected through theatre; to encourage and develop new audiences; raise awareness of Koori history, culture and current issues in the wider community and provide opportunities for the employment of Kooris in the arts. The Company has produced several outstanding plays, and was also the catalyst for the professional development of a great Koori writer, John Harding. The theatre group continues to perform and tour.



Women members of the Ilbjerri Aboriginal Theatre Company.

Koori assistant for the Koori Hospital Liaison Officer – Royal Children's Hospital (1995)

Children and their families come from all over Australia to the Royal Children's Hospital, including from remote parts of the Northern Territory and Western Australia. For many it is the first time they have been in a hospital.

The additional officer worked with hospital staff to increase awareness of cultural issues and with families to make them feel more comfortable using the hospital services. He also helped the hospital to set up procedures to maintain contact with Aboriginal patients and their families.

Brian Stegley described this project as "a good example of the multiplier effect of a really small amount of money being strategically placed."

Women's Participation in Local Government (1998)

The gender imbalance in Victorian local government brought together a number of women's and local government organisations to consider how best to work towards equal representation. The Stegley Foundation provided funds for the first phase of the project.

'A Gender Agenda' is a kit which provides practical advice and information for campaigning and how to be an effective local government councillor. It has been widely distributed, as has a second kit for newly elected women councillors. A Project Worker was employed to run regional workshops for potential women candidates and their support networks.



Women participating in local government – launch of 'A Gender Agenda 1998'.

Community Development Publication Series (1998)

Projects funded by the Foundation always undertook valuable work, but at times the quality of the written material produced was limited, and access to distribution to the wider community restricted. The Community Development Publication Series was initiated as a way of ensuring that useful material was produced and published in an accessible, user-friendly way, so as to have maximum impact in the relevant area of social change activity. The Findings Series provided four page summaries of the longer reports produced through the publication series, highlighting key findings and recommendations.

Feature – The Stegley Foundation Story: Strengthening Local Communities 1973-2001 (continued)

Community Advocacy Unit (1999)

The Foundation's partnership with RMIT's School of Social Science and Planning has resulted in a number of initiatives over the past two years. The three day Winter School on Advocacy and Social Action, held in July 1999 with over 300 participants, was a great success. It confirmed the need for, and interest in, on going training opportunities for community activists.

The Community Advocacy Unit based within the School will focus on running accredited courses, forums, workshops and seminars, as well as facilitating action research in the areas of social action and advocacy by students and members of the wider community. With funding from a private donor, the Unit has taken over the running of the annual media skills workshops for community organisations, previously funded and organised by the Stegley Foundation.

National Disability Advocacy Project (2000)

A grant was provided to develop a proposal for the National Disability Advocacy Project, which has two major components: the development of a National Agenda to improve the disability service system; and the development of training programs to assist in strengthening the disability networks across Australia. This two year project, if further funded, will hopefully make a real difference to the way in which our community accepts its responsibilities to provide full citizenship rights to people with disabilities.



The Yappera group of the Little Big Top Circus develop their circus skills in preparation for performances held during NAIDOC week in 1994. Funding enabled the circus, in conjunction with the Aboriginal Advancement League, to provide free circus skills training classes for children and music, dance and theatre classes for the youth group.



Big Brothers Big Sisters of Melbourne – Migrant and Refugee Program. This program was designed for young refugees and migrants, many of whom have little or no family support in Australia. Such children often benefit from on-going support from a caring adult (1991). Photo courtesy of the Herald Sun.

Walkley Award for Social Equity Journalism (2000)

In 2000, the Foundation became the initiating sponsor of the Walkley Award for Social Equity Journalism. The first winning entry was a series of articles in the Sydney Morning Herald, entitled 'The Companies you Keep' by Ian Verrender and Steve Burrell, which explored the extent of government support for big business in Australia. Other finalist entries covered issues such as mandatory sentencing, bullies/harassment in the workplace and the growing divide between rich and poor in Australia. The Lance Reichstein Foundation has agreed to sponsor the Award in 2001 and 2002.

The RuMAD Program: Making a Difference in the Community (Education about philanthropy programs in schools) (2000)

One of the ways in which the Foundation will leave a legacy of progressive philanthropy will be through the RuMAD Project, which it initiated as a collaborative exercise with a number of other Foundations and individuals. The project involves the production and promotion of teaching materials that are designed to give primary and secondary school students a better understanding of giving back to their communities, both financially and in other ways. The focus of the project is on student involvement in action projects within their schools and communities. Twenty pilot projects are being run in schools around Victoria.



Robert Mate Mate and Lynne Thomas, a descendent of George Robinson, at the handover of archival letters to the Museum of Victoria. This collection of 177 letters was written by George Augustus Robinson during 1839 and 1840, when he was Chief Protector of Aborigines in the Port Phillip District. These letters were purchased by the Foundation so that they could be put in the public domain and made accessible to the Koori and wider community for research, exhibition and publication (1991). Photo courtesy of the Age.

Box Hill Over 90's Club. "We see ourselves as role models for people in their 80's". This photograph was part of the 'Women over 60' photography project. The series of photographs presents the possibilities of a full and powerful ageing, showing that women's quality of life does continue and can improve after menopause, when children leave home, after retirement, after 60 (1991). Photo by Ruth Maddison.



THE STEGLEY FOUNDATION

The final phase: Trudy Wyse on the last five years

Trudy Wyse, Manager, Community Development for the Stegley Foundation during its final five years of operation, reflects on the work of grant-making within a fixed term.

In 1996, the Stegley Foundation undertook its final review, and emerged with a new emphasis and a determination to establish a new model of philanthropy – more proactive, collaborative and consultative.

Trudy Wyse took on the role of Manager, Community Development – a title which signified a role rather different from that of her predecessors and many of her counterparts at other foundations.

Her main role was not to receive and assess applications, but to work with communities, to be deeply involved in generating proposals, in project development and in many cases, project management and delivery.

"Following the review, my first task was to develop a workplan for the next five year period, outlining priority areas of work. We spelt out strategic objectives, project themes and outlines of the project types which would be likely to address that theme. It was within that



Trudy Wyse

framework that I could then go and talk to groups and organisations working in those areas" Trudy explained. Trudy sometimes became an active member of project management committees, helping to set directions, interviewing for project staff, preparing and editing project related papers and media articles.

"Having a closing date has really focussed the Trustees' minds about what their goals were in this last period, where they wanted to work, what sort of a contribution they wanted to make to achieving lasting social change" Trudy explained.

The Stegley Foundation Story: Strengthening Local Communities 1973-2001 (continued)

"The grant making became a lot more strategic, but there's been a greater willingness to take risks. If a project came up that fitted within the work plan, but needed a lot of my involvement, not just money, but active support and time as well, it was taken on" she said.

"In several instances, such as the Women's Participation in Local Government project, and in the areas of reinvigorating community advocacy in Victoria and promoting progressive philanthropy in schools, we were the catalysts for bringing people together to think through the issues and develop a proposal which could achieve real change."

One example of being prepared to take greater risks in this last phase is the National Children's and Youth Law Centre, which the Stegley Foundation funded to set up an Indigenous Rights Unit.

"That's a huge project, and it's really difficult to know how well it will work. We've given it three years' funding, and we won't even be around to evaluate it, but its potential to achieve real change is great, which made the risk worth taking" Trudy said.

"The sort of areas we've been working in, more representative local government, better consumer control of service development and design, community well-being, social justice, you can't expect 'completion' in the same way as if you were funding a specific service or facility."

In its final years, the Stegley Foundation has given fewer but larger grants in an effort to facilitate capacity building.

"The Trustees have recognised that much of the work organisations are undertaking is long term, and we need to support them over a number of years."

"For example, the Victorian Local Government Association has received a large final grant. As part of that process, we talked to them about a number of projects they might undertake over the next couple of years, including developing consultation strategies for local government, developing best practice in community grants programs, building a Resource Centre for community building initiatives."

"It's about supporting the organisation in its capacity to encourage local government to be representative and to work with and advocate on behalf of their local communities" she explained.

Another important part of Trudy's work in this last period has been to establish links between funded organisations and other donors, so that the work Stegley has helped begin can continue in years to come.

Trudy hopes that the role the Stegley Foundation has played in offering new challenges to the philanthropic sector will continue to have an impact, especially through other donors who have been working the Foundation in recent years.

"I also hope that others will continue the debate about different ways grantmakers can work, and what the role of philanthropy is in changing social structures."

"I think the whole issue of accountability is really important. The fact that philanthropic funds are public funds, and how they are spent, is a matter of interest to the whole community. Being strategic, constantly reviewing your priorities and actions, working collaboratively and making the most of your contribution, these are issues that all foundations should address" she said.

Trudy believes that one of the lasting legacies of the Stegley Foundation has been through its work with local government and community organisations.

"Through our involvement with the Purple Sage and People Together Projects, for example, I think we made a valuable contribution to challenging the dominant values and policies that were prevalent in Victoria through much of the 1990's. Together with many other organisations, we have helped give people back a voice about the sort of society they want to live in."

Give like there's no tomorrow

Sarah Stegley, one of the Stegley Foundation's trustees, reflects on the advantages of a fixed term, regular reviews, and partnerships. She spoke to Dr Diana Leat.

DL – Do you think you would have done things the same way if you hadn't had a limited life as a Foundation?

SS – I think we would have, but perhaps not with the same sense of urgency. The last five years, when closing became much more of a reality in our heads, was also the time when the Kennett Government in Victoria really went for advocacy groups. The Kennett Government wiped out any illusions we might have had that Victorians were living in a democratic society, or that community mattered.

It was then that we decided to take a proactive response, and start working with community groups to come up with good projects that would empower them, so they would be better protected from the whims of government. The urgency was partly a response to circumstances, partly a response to our imminent closure.

DL – Are you worried about what will happen to the issues you have championed when the Stegley Foundation is no longer?

SS – One of the things we decided we would do during our final review was to try and close the gap behind us. We developed a multi-pronged approach, including more co-funding, getting other philanthropists to come in and help us fund the projects we thought were important, and in the process, introducing the proactive, partnership-based method of funding to others as a long term way of operating.

Further, we decided to engage in projects that helped communities become more capable of taking on the vision themselves and carrying it forward.

DL – Why is it so difficult for foundations to address the structural causes of injustice, as you have tried to do?

SS – The first problem is the taxation laws, the definition of charity and public benevolent institution. We have at times been a little more flexible than others in deciding what we can and will fund. I'm sure many of us would be able to argue strongly that a modern definition of poverty and disempowerment is an entirely valid application of the original 17th century concepts, put in the context of contemporary society. Almost all the groups that Stegley have funded represent people living below the poverty line.



Sarah Stegley

The second problem is that sometimes, foundation boards are dominated by trustees who evaluate their success in terms of how much the capital has grown, rather than what they've achieved, or more to the point, what the people they have funded have achieved. These boards should open themselves up, get community participation.

Thirdly, there must be political will to challenge structural injustice, and fourthly, there must be the will to actually solve a problem and see it disappear.

DL – What advice would you give to a new philanthropist embarking upon a giving program for the first time?

SS – First, work in 10 year blocks. Pretend that there's no more money after that period, and if there is, start the process again.

Second, review what you're doing at least every 10, if not five years. And get someone who's much smarter than you to come in and help you review, providing an objective viewpoint.

Third, get like minded philanthropists onto the Board with you, so that you're spreading the experience, the knowledge and ideas. The best model is if someone with money to give can ring you up and say, "I know your research officer does great work, I really like your guidelines, can I come in and sit on your board and co-fund with you?" We've been able to do that at the Stegley Foundation. I think that kind of work is ground breaking, and it would be good if other trusts did more of that.

Fourth, of course, is determining your policies – not only your areas of interest, but what you actually want to achieve in those areas. You can't just say, for instance, we are going to fund disability groups, without deciding what sort of outcomes you expect, and what type of groups you will work with within that huge area of interest. And the best way to help you determine your objectives is to get expert advice, get a reference group together that can inform the board.

The Stegley Foundation Story: Strengthening Local Communities 1973-2001 (continued)

DL – Can you, from your experience of a family trust, offer any advice to corporate foundations?

SS – I wish corporates would go about philanthropy in the same way they go about the rest of their business. If they saw themselves as investing in Australian society, rather than just giving money to the needy, they'd be far more effective.

Philanthropy is not just something you do at the end of the financial year. It's got to be an ongoing commitment. And it's got to be grounded in real experience, which is why corporate philanthropists, just like private or family trusts, need reference groups, advice from people who live with disadvantage on a daily basis. If you decide to fund disabled people, or sole parents, or drug users, bring people in, ask them what their lives are like, what their needs are.

DL – Why did the Stegley Foundation decide to get involved in developing projects, rather than wait for submissions to come to them already formed?

SS – To me, the word 'charity' conjures up a view of sitting back and waiting for the poor and the needy to come to you. That's the 'noblesse oblige' thing, the more conservative image of Jesus Christ as a benevolent soul who cared for the sick and the poor. The other view of Jesus Christ is that he was a rebel and a radical, who fought hard and fast against Rome and against those who oppressed his community.

Modern philanthropy should be leaving behind those old notions of 'charity' and taking a more proactive, and provocative role, working with the community to tackle injustice and inequality.

One of the great positions you find yourself in, is being able to coordinate a whole lot of small groups or geographically disparate communities, you can make links between people tackling similar issues. Many communities don't know what's happening elsewhere because they're so busy just trying to stay afloat. If a foundation is proactive, they can identify a problem that affects a range of people, bring people together and say 'let's design a project that addresses the issue across the board'.

DL – If we had ideal governments, would we still need foundations?

SS – No, we wouldn't. Our response has been to get involved in democracy, in advocacy. Get the community demanding their rights from government, but don't let government pass the buck to philanthropists.

When ATSIC started pulling funding out of local Aboriginal community centres. Of course it was impossible for us or any other foundation to replace this funding, so our response was to work with local government to ensure that they responded to the needs of local Aboriginal communities, and that Koori voices were heard within local government structures.

We've found that the closer you work with local government, the closer you work with communities, as local government is the level that affects people's daily lives the most.

Keeping the flame alive

Perhaps one of the most memorable collective moments of 2000 was the day when hundreds of thousands of Australians walked together across Sydney Harbour Bridge in support of reconciliation.

In total, over one million Australians took part in people's walks all over the country to show their support for reconciliation, and for action to make it happen.

The walks resulted from the work of the Council for Aboriginal Reconciliation, in conjunction with state based committees for reconciliation, and many locally based groups. The Council for Aboriginal Reconciliation was established as part of the formal decade of reconciliation in 1991 by a unanimous vote of Federal Parliament. The Council ceased to exist on 31st December 2000.

The work of building reconciliation is, however, far from finished.

Reconciliation Australia is the new body, established to take up where the Council for Aboriginal Reconciliation left off. It is non-profit, non-partisan and completely independent of government. The role of the new body is to maintain a national focus for reconciliation.

"Australians have walked together, now we have to work together, to make reconciliation a reality in our communities, workplaces and organisations" said Reconciliation Australia co-chairs Shelley Reys and Fred Chaney.

For 10 years, the Council was supported by the consistent efforts of many thousands of Australians. It is the intention of Reconciliation Australia to build on this legacy of an active and broadly-based movement to give substance to the word 'reconciliation'.

The mission of Reconciliation Australia is to deliver tangible outcomes for reconciliation by forging innovative partnerships to:

- Achieve social and economic equity for Indigenous Australians;
- Strengthen the people's movement for reconciliation;
- Acknowledge the past and build a framework for a shared future.

A key starting point has been to seek responses to the proposals and recommendations in the Council for Aboriginal Reconciliation's final report to the Parliament. Reconciliation Australia has written to governments seeking their responses, and has been in the process of writing to other interested parties for their views about the next steps.



Six of the nine board members of Reconciliation Australia.

Reconciliation Australia's programs currently underway include:

- Identifying and promoting models of best practice in service delivery that result in measurable outcomes for Indigenous communities;
- A national conference to critically examine Indigenous governance now and into the future;
- Innovative and systematic approaches to overcoming barriers to the provision of banking and financial services to Indigenous Australians;
- The development of educational materials to improve public understanding of reconciliation issues.

One example of this approach was Reconciliation Australia's recent public call to seek a concerted national effort to address the issues of family violence and sexual abuse in Indigenous communities as an essential element of the reconciliation process. This call has been taken up and supported by all sides of politics. One aspect of this call was to caution against destructive and point scoring debate and, rather, to focus on the substantive issues and effective solutions.

Reconciliation Australia has undertaken to keep all those interested in the reconciliation process informed, both through its website, and through a newsletter for people who sign up as Friends of Reconciliation.

Reconciliation Australia has been active in promoting National Reconciliation Week (NRW), which took place from 27 May to 3 June. Since its first celebration five years ago, NRW has become a major event on the national calendar, culminating in last year's Corroboree 2000 events, the reconciliation walks, and the strong reconciliation theme at the Sydney 2000 Olympic.

As an independent, non-government and non-profit body, Reconciliation Australia relies on community and corporate support in various forms to enable it to carry

Member File – New Associate Member

Reconciliation Australia (continued)



National Reconciliation Week Ceremony, AFL match, S.C.G.

out its role. Both a Friends of Reconciliation and a Corporate Partnership program have been established for those who support Reconciliation Australia and its activities.

The Board of Reconciliation Australia comprises:

Mr Campbell Anderson – former President, Business Council of Australia and former President, Minerals Council of Australia.

The Hon Fred Chaney AO (Co-chair) – member National Native Title Tribunal and former Commonwealth Minister for Aboriginal Affairs.

Mr Joseph Elu – Chairman, Indigenous Business Australia and former Chairman of the Torres Strait Islander Advisory Board.

Mr Dick Estens – Chair, Gwydir Valley Cotton Growers Association and founder, Moree Aboriginal Employment Strategy.

Rev Dr Djinyini Gondarra OAM – Uniting Church Minister.

Ms Jackie Huggins AM – Deputy Director of the ATSI Unit at the University of Queensland and former Co-commissioner on the Inquiry into the Forced Removal of Aboriginal and Torres Strait Islander Children from their families.

Mr Mark Leibler AO – Senior Partner, Arnold Bloch Leibler and President, Executive Council of Australian Jewry.

Mr Michael Long – Essendon Football Club.

Ms Shelley Reys (Co Chair) – Managing Director, Arrilla Aboriginal Training and Development and former Australians for Reconciliation Coordinator NSW.



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Telephone: 0409 765 787
Website: www.reconciliation.org.au

Mr Brett Peterson, Australian Taxation Office (ATO) Assistant Commissioner (Small Business), spoke to Philanthropy Australia members in June about important taxation issues for grant makers. Here is a summary of his comments.

Some basic definitional clarifications

Tax exempt charities are those that are exempt from paying tax on their own income.

Gifts to bodies with the Deductible Gift Recipient (DGR) status are deductible to the donor. DGR status is generally subject to more onerous requirements than tax-exempt status.

There are various subsets of DGR such as prescribed private funds (PPF). Being a prescribed private fund does not necessarily guarantee the awarding of tax-exempt charity status.

Status as a prescribed private fund (and therefore associated DGR status in that regard) is awarded by the government. DGR status in most other instances is handled by the ATO.

Tax-exempt charity status is not awarded by the government but rather by the ATO through an endorsement process and turns on the definition of what is charitable under the common law.

Prescribed Private Funds (PPF's)

PPF's are so-called because the fund is not required to seek money from public sources as current public funds must do. However, having PPF status does not prevent a fund from seeking funds from the public.

The Government issued guidelines on 30 March 2001, in the form of a media release by the Prime Minister. Two of the important issues discussed in these guidelines are those of the 'settled sum' and 'accumulations of gifts'.

Settled sum refers to the initial amount given by the founder to establish the trust. This is normally a nominal payment of, say, \$100. There is, however, no legal reason why this cannot be a significant amount. (The ATO has the view, however, that the settled sum is not deductible for taxation purposes, as it will have been given at a time before the fund is prescribed, and accordingly in practice it would often be a nominal amount.)

Accumulation of gifts refers to the accumulation of gifts to the prescribed private fund after it has been established. The ATO will insist on a plan being provided for the accumulation of gifts. There must be a reason for the accumulation (eg. the desire to build up a capital base in the fund) to enable efficient administration etc, and some clear 'goals' or 'directions'.

The Government guidelines indicate that it is unlikely to prescribe a fund proposing indefinite accumulations, as it wants to see the money flowing into philanthropic activities.

Accumulation of income and CPI

The guidelines in relation to prescribed private funds state that income must not be accumulated above an amount necessary to maintain the real value of the capital of the fund at a particular time. This calculation would be based on the CPI.

In regards to the transfer of assets between public funds and prescribed private funds, on winding up, a public fund may pass assets to a prescribed private fund, and a prescribed private fund may pass assets to a public fund. The ATO's position on this (specifically covering private funds) is not expressly set down anywhere. But, the general policy position is put in paragraphs 11 to 13 of Taxation Ruling TR 95/27, and such transfer on winding up would be within that policy.

Where the transfer is made otherwise than on winding-up, then the situation is different, and a little more complex. Broadly, the transfer of assets from a public fund to a prescribed private fund would not ordinarily be considered a use of the funds for the purposes justifying gift deductible status. The requirement is that gifts received by public funds are used only/solely for the principal purpose of the fund.

In the case of prescribed private funds, the requirement is that assets are solely for the purpose of providing to funds, authorities and institutions covered by Subdivision 30-B of the Income Tax Assessment Act 1997; that is, those funds covered by general or specific listing in sections 30-20 to 30-105 of the Act. In other words, prescribed private funds exist for the purpose of passing assets on for the benefit of other deductible gift recipients. But, a prescribed private fund should not transfer assets to an ancillary fund (which is in effect the public fund equivalent of a prescribed private fund), or another prescribed private fund, as these are not covered by Subdivision 30-B.

For the purposes of this issue I have put entirely aside some of the 'complications' that can arise in relation to trust law. In short, regard would in each case need to be given to the terms of any given trust, and the equitable rules applying to trusts (eg. broadly, a trust must have specific objects (recipients), unless it is charitable – but, not all potential gift recipients set out in Subdivision 30-B will necessarily be charitable).

Claiming refunds of excess franking credits

The ATO's view is that the policy intention, and correct application, of the law is to provide the appropriate refund of excess franking credits on an annual basis (ie. not monthly, quarterly or half-yearly as requested by some entities).

The ATO's intended service standard is to process refund application forms within 28 days, provided of course the form has been completed correctly, and sent to the correct address.

The ATO has worked very hard to ensure that the process for claiming the excess franking credits is simple.

It is hoped that electronic lodgement of applications will be available next year or soon after. This year, refunds will be paid by EFT in a small number of cases, but otherwise by cheque.

Support for the non-profit sector

The ATO is making some investment in assisting the non-profit sector. Soon the ATO-assist website (www.ato.gov.au) will have a 'non-profit' button, taking such organisations to a part of the site specifically intended for members of that sector.

The ATO is reviewing its phone support/assistance systems for this sector.

The ATO is also looking at supplementing its existing range of Fact Sheets specifically for the non-profit sector.

Does the ATO view foundations as part of the non-profit sector or as a separate sector?

The ATO is a large organisation and for purposes of administrative efficiency it segments the 'taxpayer' population into a range of sectors including Large business, Small to Medium business, Micro business, and Non-profit. This assists in managing compliance in each of those sectors. Charities and foundations are both considered to be a part of the non-profit sector for ATO purposes.

When will the draft ruling on the definition of 'charity' become dogma?

An inquiry into the definition of charities and related organisations is currently being conducted, with the findings to be provided to the Government at the end of June 2001. The ATO is delaying further action on the draft until the likely outcomes of the inquiry are clearer.

When will the Private Ruling issued to Philanthropy Australia members relating to the GST be made a public ruling?

The Private Ruling issued to Philanthropy Australia members provides that grants made are not a taxable supply for GST purposes when a set of specific conditions are met. Being a private ruling it does not bind the Commissioner in relation to arrangements entered into by anyone not expressly covered by the ruling. However I will re-examine the details of the Ruling with a view to making it applicable to bodies that meet the specific conditions regardless of whether or not they are Philanthropy Australia members.

Toward the end of June 2001 information will appear in the Charities Consultative Committee Resolved Issues document on the Tax Reform website – www.taxreform.ato.gov.au/ind_partner/charities/charities.htm

When published on the web the material will be a public ruling for GST purposes. Section 37 of the Taxation Administration Act 1953 refers (the operation of section 37 in this regard is explained by paragraph 10 of GSTR 1999/1, which says – "All forms of written advice involving the interpretation of GST law that we produce other than GST private rulings are public rulings within the terms of the TAA and are binding on the Commissioner.")

Can the GST be simplified and compliance costs associated with the BAS be reduced as they have been for small business?

Small businesses have the same record keeping requirements as philanthropic organisations. Small businesses can now choose to use ATO calculated instalment amounts in appropriate cases. However, philanthropic organisations will also benefit from the simplification of reporting arrangements announced by the Government in February 2001.

The suggestion that the philanthropic sector be exempted entirely from the GST regime would be a fundamental change. The philanthropic sector represents a very small percentage of the ATO's workload and the Government's income from taxation. Ordinarily factors such as the number of taxpayers affected and the amount of revenue involved will be relevant in determining priorities. However, there can also be other relevant factors. Change such as that suggested would require a Government decision.

Public benevolent institutions are (to a degree) exempt from FBT, but are required to keep records, to confirm that the exemption cap is not exceeded (and to calculate FBT liability in cases where the cap is exceeded), and to meet the reporting requirements for employees' payment summaries.

Other charities are not exempt. However, they frequently will be rebateable. This means that their FBT liability is reduced, effectively putting them in an equivalent position to taxable employers, who can claim an income tax deduction for FBT paid.

Additionally, organisations are required to calculate FBT in more than one way. Unfortunately, this is necessary as some fringe benefits can incur GST on which input tax credits can be claimed.

Upon receipt of an application how long will it take to receive PPF status?

Initially, it may take the ATO approximately two to three weeks from the time it receives such an application until it is able to forward it to the Assistant Treasurer. These early days will be a time of learning for both the ATO and fund applicants.

The length of time that it will take at the Assistant Treasurer's office is subject to the priorities in his office, and the ATO is unable to make any commitments about this.

The ATO will generally recommend that the PPF status be awarded from the date that the Minister approves the fund. It is likely to be a very rare occurrence for PPF status to be ascribed retrospectively by the Minister.

Publications

Third sector: The contribution of nonprofit and cooperative enterprises in Australia

Mark Lyons
Allen and Unwin, 2001

Mark Lyons' eagerly-awaited publication provides both an overview and a detailed analysis of Australia's diverse and vibrant third sector. The book provides a definition of the sector, locates it within Australian society, examines its history, activities and interaction with other sectors, and provides some analysis of the sector's challenges and potential future directions in the face of massive social, economic and policy changes.

Tackling multiple disadvantage: The role of community foundations

A report to Community Foundation Network
Julia Unwin, August 2000

This report examines the role of community foundations in addressing disadvantaged communities. It presents findings on the creation of partnerships and assessing benefits brought by and for community foundations. Three models of partnership are discussed, and the report concludes by suggesting some principles of good practice.

Trustee connection: The middle tier

Women & Philanthropy, Washington D.C. 2000

Report of a survey of demographics of middle sized foundations in the United States.

Dimensions of Australia's third sector

Mark Lyons and Susan Hocking
UTS, 2000

A report from the Australian Nonprofit Data Project, CACOM

Changing the future: Tackling rural poverty and social exclusion through the work of a community foundation

Jan Crawley 2001

Equality of opportunity: A framework for community foundations

Report of the Equal Opportunities Working Party to ACTAF July 1996

Independent funding: A directory of foundation and corporate members of the EFC

2000 edition
European Foundation Centre

Communication and philanthropy: (proceedings of the National Conference 2000

Philanthropy New Zealand

Journals and newsletters

- Intermission – June 2001
The Malcolm Sargent Cancer Fund for Children
- Philanthropy in Europe
Issue 5 2/2001
- Front & Centre: Voice of Canada's Charitable, Voluntary Community
Volume 8 No. 2 March 2001
- Alliance: Building Resources for the Community Worldwide CAF
Volume 6 Number 1 March 2001
- Pilch Matters: Newsletter of the Public Interest Law Clearing House
Issue 3 April 2001
- The Friend: Newsletter for the Friends of the Education Foundation
Winter 2001
- Community Foundation Network Newsletter
May 2001
- Inside ISTR
International Society for Third-Sector Research
Volume 9 Number 1 January-March 2001
- CIVICUS World
January-February 2001
- CIVICUS in Asia Pacific
Issue 6 April 2001

Annual reports

- Victorian Women's Trust Annual Report 1999-2000
- Foundation for Young Australians: The Year in Review 2000
Activities to 31st December 2000
- The Garvan Institute of Medical Research
2000 Annual Report



Home conferences

Ethical Investment Association Conference 2001

When: 3-4 September, 2001

Where: Melbourne, Victoria

Contact: Ethical Investment Association,
Level 8, Castlereagh St, Sydney NSW 2000

Phone: (02) 9214 84211

Email: info@eia.org.au

Website: www.eia.org.au/

Abroad conferences

4th CIVICUS World Assembly

When: 19-23 August, 2001

Where: Vancouver, BC, Canada

Contact: Shabna Ali, Conference organiser

Phone: 1-604-408-6722

Fax: 1-604-408-6723

Email: assembly@civicus.or

Website: www.civicus.org/pages/assembl2.html

Council on Foundations

17th Fall Conference for Community Foundations

When: 15-17 October, 2001

Where: Vancouver Trade & Exhibition Centre,
Vancouver, Canada

Contact: 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

Website: www.cof.org/conferences/index.htm

Let Every Voice Be Heard: The Responsibility of Leadership Independent Sector Annual Conference

When: 4-6 November, 2001

Where: Atlanta, Georgia, USA

Contact: Bob Shoe, Independent Sector,
1200 Eighteenth Street, NW, Suite 200,
Washington, DC 20036

Phone: 0011-1-202-467-6100

Fax: 0015-1- 202-467-6101

Email: meeting@independentsector.org

Website: www.independentsector.org/

ARNOVA (Association for Research on Nonprofit Organisations and Voluntary Action) 30th Annual Conference

When: 29 November – 1 December, 2001

Where: Inter-Continental Hotel, Miami, Florida, USA

Contact: ARNOVA, 550 West North St. Suite 301,
Indianapolis, IN 46202-3162

Phone: 0011-1-317-684-2120

Fax: 0011-1-317-684-2128

Website: www.arnova.org/

Council on Foundations

16th Family Foundation Conference

When: 6-8 February, 2002

Where: New Orleans, Louisiana, USA

Contact: 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

Website: www.cof.org/conferences/index.htm

Philanthropy Australia – Members

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ESSO Australia Pty Ltd & Mobil Oil Pty Ltd
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The Felton Bequest
The Foundation for Regional and Rural Renewal
The Foundation for Young Australians
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The Ern Hartley Foundation
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Law Foundation of New South Wales
The Flora & Frank Leith Charitable Trust
The Dafydd Lewis Trust
Lion Fund
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The Miller Foundation
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The National Foundation for Australian Women
Perpetual Trustees Australia Ltd.
Perron Investment Pty Ltd (The Stan Perron Charitable Trust)
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The Queensland Community Foundation
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The Garvan Research Foundation
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St George Foundation
The St. James Ethics Centre
The Smith Family
The State Library of Victoria Foundation
The State Library of New South Wales
Tabcorp Holdings
Tasmanian Museum & Art Gallery
United Way Australia Ltd.
The University of Melbourne (Alumni Office)
University of South Australia Foundation
University of Tasmania Foundation
University of Western Australia
Variety Clubs of Australia
Victorian Department of Premier & Cabinet (Government Information & Communication)
Vision Australia Foundation
Zoological Parks and Gardens Board

International Members

Himalaya Foundation (Taiwan)

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The European Foundation Centre (Brussels)
The Canadian Centre for Philanthropy
Asia Pacific Philanthropy Consortium

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