

Australian Philanthropy

Winter 2002 – Issue 48

Feature: Aspiring to Greater Transparency



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



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Australia

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PHILANTHROPY
Australia

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From the President



Welcome to this edition of the renamed '*Australian Philanthropy*.' We decided to adopt the new moniker as our international readership has been growing, along with overseas interest in this country's philanthropic sector.

Over the next two editions, we will focus on the issues of accountability and transparency. The majority of Australian foundations are seeking to operate as professionally and efficiently as possible. This ensures not only more effective grant-making, but also encourages greater public trust and respect for the sector as a whole. As grantmakers, we are demanding more accountability and transparency from the organisations we fund, and for good reasons. It follows that we should also seek to meet these standards ourselves.

One of the services Philanthropy Australia can provide is support for increased professionalism. This can be in the form of information, professional development for officers and trustees and guidelines for standards of accountability and transparency. In this edition, we provide some information about the pros and cons of Codes of Practice (voluntary and mandatory), as well as a profile of one Australian foundation which has decided to publish a full financial annual report.

Greater accountability is something that the Worldwide Initiative for Grantmaker Support (WINGS) is promoting through peak organisations world-wide. Philanthropy Australia was pleased to host the recent WINGS conference in Sydney. One of the many benefits of the conference was the increased media coverage it attracted for the work of the philanthropic community in Australia.

That community has welcomed more new members in recent times. I was delighted to be involved in the recent launches of both the Wingecarribee Community Foundation and the Telstra Foundation. Both stand as wonderful examples of the variety of forms philanthropy can take. Meanwhile, our final farewells and tribute to the work of the Stegley Foundation were made by way of a special presentation at the Philanthropy Australia Annual General Meeting.

Change, growth and becoming better at doing what we do are all part of the challenge and joy of giving.

A handwritten signature in black ink, reading 'Lady Southey'. The signature is written in a cursive, flowing style.

Lady Southey
President

From the National Director



'Fair go' still a force in Australian society

Unprecedented media coverage for Australian philanthropy was one of the most important legacies of the recent International Grantmaker Association conference in Sydney.

More than 100 representatives from grantmaker associations in more than 30 countries gathered in Sydney in early March for three days of discussion, focussed on how best to promote philanthropy within national and international environments.

Dubbed WINGS (Worldwide Initiatives for Grantmaker Support), the program has been developed by an international committee representing all parts of the globe. The secretariat is based in Washington DC at the US Council on Foundations and principal funding is provided by the Ford Foundation and the Charles Stewart Mott Foundation.

Philanthropy Australia bid to host the international gathering, which took place from March 10-13. The first meeting was held four years ago in Mexico, since which time the international network has grown substantially – mirroring the increasing interest in philanthropy nationally and internationally.

The focus of Philanthropy Australia's bid was to heighten awareness and understanding of philanthropy in the southern hemisphere, especially the Asia-Pacific region, to showcase recent developments in Australian philanthropy and promote philanthropy to the Australian media, general public and policymakers.

Former US Ambassador to South Africa, James A. Joseph opened the conference with a tantalising vision of philanthropy as 'soft power'. In contrast to the power of the nation state or economic power, the soft power force of philanthropy opens doors, ensures dialogue and supports democracy and innovation in a way that more formalised power structures cannot.

Australia's Fred Chaney, Co-Chair, Reconciliation Australia; Charles Lane, CEO, The Myer Foundation; Darren Godwell, CEO, Lumbu Indigenous Community Foundation and Lillian Holt, Director, Centre for Indigenous Education, Melbourne University gave what was rated as the most powerful, confronting and interesting of the conference's many sessions. Their frank analysis of the difficult issues facing contemporary Australian society, particularly with reference to reconciliation between black and white Australians, stimulated intense discussion and comparison with other national and philanthropic responses to reconciliation with indigenous populations.

Delegates represented well established associations right through to emerging Asian, Eastern European and African organisations dedicated to supporting national philanthropy. The key word that arose from the delegate evaluations was 'respect' – the respect with which delegates' contributions were received. This was directly attributed to the Australian culture, which unmistakably valued their very different experiences. Commentators increasingly tell us that the 'fair go' is a thing of the past – our experience suggests that it is still a palpable force.



Elizabeth Cham
National Director

Changing the Face of Philanthropy

Sydney, Australia, March 10-13

Media Summary

Following is an indication of the level of publicity generated by the WINGSForum hosted by Philanthropy Australia in Sydney.

Media Outlet	Presenter	Item
702 ABC Sydney	James Valentine	Interview with Elizabeth Cham
ABC Classic FM	Margaret Throsby	Interview with James A. Joseph
ABC Radio PM	Kirsty Mclvor	Interview with Lillian Holt and Darren Godwell
ABC Radio National	Bill Leech	Interview with Barry Gaberman
ABC Radio National Life Matters	Geraldine Doogue	Interview with James A. Joseph
ABC Radio, Perth		Interview with Elizabeth Cham
ABC TV Stateline	Mary Gearin and James A. Joseph	Interview with Barry Gaberman
Nine Network Today Show	Steve Liebmann	Interview with Elizabeth Cham and James A. Joseph



New way of giving for a new world

It's critical that Australian philanthropy gets really creative now, Elizabeth Cham writes

PHILANTHROPY — the often unsung voluntary work performed by so many individuals and foundations — cannot replace the ever-shrinking public sector. But philanthropy can sponsor some lively debate and fresh thinking about the nature of civil society. This is especially important as the relative roles of the state, corporation and community have become blurred.

In Australia, philanthropy is almost always seen as an American phenomenon. Yet, paradoxically, its deep influence on American society has been underestimated.

A large number of vital services that underpin American society were originally funded by philanthropic foundations — such as the 911 emergency response system and the accident prevention initiative of white lines along the outside shoulders of highways. Another example is *Sesame Street* — the most widely viewed children's television series in the world — which became self-supporting after an initial seed funding from a foundation. Then, there are institutions such as the Getty and the Guggenheim Museums; the Carnegie endowment to libraries; and the huge endowments to the Ivy League universities such as Yale and Harvard.

In Australia, philanthropy has been largely invisible, yet it is also pervasive. The concept is usually understood in the context of privately sourced money for the social welfare of the poor and disadvantaged. Yet, the range of activities that are supported by philanthropic foundations covers the environment, the arts, medical research and innovative social welfare programs.

Beginning in Victoria's western districts, the Potter Farm and Plan demonstrated to farmers in a practical and immediate way that both ecologically and economically sustainable agriculture could be achieved. It has pioneered a pattern of farming practice which now attracts substantial government support through the Land Care program. The arts have also benefited. One bequest alone, the Felton Bequest, has funded more than 30 per cent of the National Gallery of Victoria's acquisitions.

Philanthropy has established fine medical research centres such as the Walter and Eliza Hall Institute and the Garvan Institute. Research centres such as these have contributed very significantly to Australia's international reputation for excellence in medical research.

THESE and countless other examples show the strength of philanthropic foundations in long-term planning; some innovative projects run for five to 10 years, thereby bringing lasting benefits to the community. By contrast, governments too often have a short-term focus.

In this way, philanthropy has been the venture capital for the community. There is a growing perception that philanthropy is important today because governments are retreating from traditional community services — such as basic healthcare, education, supporting cultural institutions and providing for the disadvantaged. But philanthropy can never replace the role of government in providing such a range of services. All of Australia's annual philanthropic giving would not keep the national health system going for even a week.

Philanthropic monies are small and, in any case, money alone is not the solution to society's problems. What philanthropy can do, that is distinctive and valuable, is to bring together the people who have identified a problem with those who have the ideas and energy to explore solutions. And philanthropy can give them what they need to make progress together: a little money and a lot of time.

Vigorous debate and analysis are sorely needed, especially now that the boundaries between business, government and community are becoming porous, a development starkly illustrated by the fact that only 19 of the world's 50 largest economic entities are nation states. Further evidence of these uncertain boundaries is the sale of public assets by governments, stripping the infrastructure of communities.

Philanthropy's real role at this critical moment in history is to fund the debate about the kind of civil society we should have and to expose people to new ways of thinking, as well as continuing to provide funding for innovative schemes that would benefit the community.

A hundred years ago, Australia was seen as a social laboratory. People from overseas marvelled at innovations such as a basic wage, a pension system for the elderly and votes for women. Now, at the beginning of a new century, philanthropy can be the catalyst to ensure that, once again, people look to Australia. The lesson we can teach is that without creative social and political structures, we cannot grow into a truly civil society.

Elizabeth Cham is national director of Philanthropy Australia and is taking part in an international forum — *Wings: Changing the Face of Philanthropy* — in Sydney this week.

Mon 14 Mar 2002

FINANCIAL REVIEW

Philanthropist gives 'tax cheat' notion the boot

Catherine Fox

The idea that some the biggest philanthropic foundations in the world were primarily set up as tax dodges is far from the truth. Tax cheating was a long way from what Henry Ford had in mind when he established the Ford Foundation in 1936.

In fact, income tax didn't even exist then, says the foundation's senior vice-president, Barry Gaberman. Henry Ford set up the foundation - now with assets of nearly \$US11 billion (\$21 billion) and annual grants of \$US750 million - for much more altruistic reasons.

"There's a tendency to think a lot of large philanthropic groups started in some way to avoid tax. But it was considered almost immoral to die that wealthy," he explained during a visit to Sydney last week for an international conference of philanthropic associations, the WINGSForum.

Ford and some of the other US family business benefactors believed that responsibility came with the great wealth they accumulated. It's a tradition still in existence with the Gates Foundation, now the largest of its type in the US.

But the meaning of philanthropy, and just what role corporate giving has these days, is changing rapidly. There has been a tendency, Mr Gaberman says, to think of philanthropy as synonymous with charity. While there's a place for charity, it tends to assuage the symptom and not deal with the cause.

"What one is seeing throughout the world is a move now from the notion of philanthropy as charity to a strategic and developmental meaning," he says. The drivers for philanthropy differ by region. In some countries, the corporate sector is the engine. In these places - the Philippines, Brazil - corporations think beyond the concerns of shareholders and understand that most of what they do in the area is compatible with their business objectives.

In other countries, it's about community philanthropy. Mr Gaberman says. And in places where corporate giving doesn't rank as a major priority, there can be a range of reasons.

"In the US we have an extremely generous tax incentive. Five per cent of pre-tax profits can be deducted for

our giving programs. That's probably more significant than anywhere else. In Australia, by and large, you have a fair amount of corporate involvement in the arts and education where they feel safe ... there's not much of an incentive here.

"You have to think of it as a two-tier approach: that you build into the curriculum of business schools a course that deals with ethics and corporate responsibility and think about it in ways that are compatible to business goals," Mr Gaberman says. "And you have to make the point it is valued through leaders of the corporate world, because what the CEO has to say makes a lot of difference.

"And attitudes also change according to the business cycle. In the 1960s and 1970s, corporate leadership talked about a broad vision and involvement outside the narrow focus of direct business activity. We then went

through difficult times and lots of mergers and a corporate notion of what philanthropy was came out - a very focused set of activities where giving programs became another revenue centre.

"People are seeing now that's a rather limited vision and are going back to a broad sense of what stakeholders are."

This shift is a topic James Joseph, former US ambassador to South Africa, picked up on in his opening address to the WINGS conference. Alliances and partnerships will be the future for philanthropy, he says.

And that has some implications for future leaders of society, who will not be the ones that fit the establishment's current view of leadership. This new breed will seek to disperse rather than concentrate power.

"Another way of thinking about the changing concept of philanthropy is to see it as soft power in a world still dominated by hard power," Mr Joseph says.

Nelson Mandela, he adds, represents the epitome of soft power, which is about attracting and influencing through the flow of information and relationships.

Tues 19 Mar 2002

Big spenders spend a little time in Sydney

Valerie Lawson

It has been accused of being a CIA puppet, and a front for "dangerous communists." Half a century ago, it owned the bulk of the shares in the Ford Motor Company and people still write in to say they will never again buy a Ford car, because they don't approve of a grant it has made.

But the Ford Foundation has survived 66 years to become America's third biggest philanthropic foundation, and perhaps the world's most influential.

Its founder, Henry Ford, said "money is like an arm or a leg; use it or lose it." Since his death in 1947, the foundation has used it, building an \$US11 billion (\$21 billion) fund on the back of the money he, and his son, Edsel, left in their wills.

Its presence is everywhere, from its home in New York, to India and South Africa. This week in Sydney, the Ford Foundation's influence is hovering over a three-day international conference of philanthropic organisations, known by the ethereal acronym, WINGS. Its weightier full name: Worldwide Initiatives for Grantmaker Support.

The Ford Foundation's endowment of \$US11 billion is "probably a tad more than that right now. It's been a good week or two on the stockmarket," said the foundation's senior vice-president, Barry Gaberman, who helped establish WINGS in Washington four years ago.

A keynote speaker at the conference, Mr Gaberman has spent three decades with the foundation, which is three times as big as the Rockefeller Foundation and five times larger than the Carnegie Corporation of New York. It was the frontrunner in the United States, until Bill Gates came along with his Gates Foundation, worth about \$US20 billion. The Lilly Foundation, in second place, "has shot up to the neighbourhood of \$US15 billion a year, but its stock is entirely in a single corporation while our portfolio is diversified", said Mr Gaberman.

From 1950, when it owned 90 per cent of the non-voting stock in the Ford Motor Company, the foundation has gradually divested its stock in the company, to capitalise

large programs in social sciences, including education and the arts.

Fresh from the 50th birthday celebrations of the Ford Foundation's presence in India, where he was garlanded by an elephant, Mr Gaberman yesterday joined 105 other delegates for cocktails with the Governor-General at Admiralty House, and today will hear the opening address of the conference by the Premier, Bob Carr.

The host organisation in Sydney is the peak body Philanthropy Australia, whose national director, Elizabeth Cham, said Australian trusts and foundations distributed \$1 billion a year.

Ms Cham said Australia lagged far



Henry Ford: 'use it, or lose it'

behind the US because of its egalitarianism, the idea that the government was there for all, and because "we've never had a working poor, because of the basic wage, and that is a huge thing other nations didn't have".

"We have a lot of foundations here, but philanthropy has been invisible, seen as private money, not to be discussed. We're not very good about talking about money the way the Americans do," she said.

"Families like the Myers and Murdochs do [philanthropy], but they don't want to be seen talking about it. This conference marks the coming of age of philanthropy in this country."

Mon 11 Mar 2002



David Gonski, Art Gallery Foundation with Elizabeth Cham, National Director of Philanthropy Australia.



Barry Gaberman, Senior Vice President, Ford Foundation and Lady Southey, President of Philanthropy Australia at the opening plenary session on 11 March.



Fran Lanigan, Conference Publicist; Grant Hooper, Philanthropy Australia and Lourdes Sanz, CEMEFI at the Art Gallery of NSW Gala Dinner on 12 March.



Lee Madden, Metropolitan Aboriginal Land Council. 'Welcome to Country' Opening Plenary session, 11 March.



Dur-é Dara, Vice President Philanthropy Australia and Luis Amorin, EFC.



Philanthropy Australia staff. Back: Grant Hooper, Kerrie Zammit and Vanessa Meachen. Front: Ruth Jones, Dur-é Dara and Elizabeth Cham.

The New 'Soft Power'

One of the highlights of the recent WINGS conference in Sydney was an address by Ambassador James A. Joseph.

The President Emeritus of the Council on Foundations, former US Ambassador to South Africa and Executive Director of the United States – Southern Africa Centre for Leadership and Public Values at Duke University spoke about the changing context of philanthropy in an increasingly globalised yet divided world. Here is a summary of his speech to the conference, which drew from a soon to be published book.



Ambassador James A. Joseph

By Carole Fabian, Philanthropy Australia.

Philanthropy is “soft power in a world still dominated by hard power,” according to Ambassador James A. Joseph.

Hard power refers to the use of military might or economic muscle to influence and even coerce. Soft power refers to the ability to attract and influence through the flow of information, the appeal of social, moral and cultural messages and the relationships established through acts of generosity.

“Hard power is the ability to get others to do what we want. Soft power is the ability to get others to want the same things we do. The former is based on coercion. The latter is based on attraction and affinity,” Ambassador Joseph explained.

“Nelson Mandela is the epitome of soft power. His influence comes from the power of his humanity and the elegance of his spirit. His influence comes from his message of reconciliation and the moral instinct embodied in his spirit of forgiveness. As President, he was the prototype of the leader whose influence came not from military or economic might, but from the power of ideals and the ability to capture the minds and hearts of people in all corners and colors of the universe.”

Ambassador Joseph believes that the notion of philanthropy as soft power is one that deserves serious attention.

“Philanthropy can provide hope and healing to those broken and battered by economic systems. It can provide purpose and promise to those intentionally underdeveloped by political and educational systems. It can provide creativity and innovation for those seeking resources to facilitate research or to unlock the mysteries of new ideas struggling to be born.”

“Donors and professionals in the field of philanthropy are on the cutting edge of the new era of soft power. People everywhere are coming to realise that a good society depends as much on the goodness of individuals

as it does on the soundness of government and the fairness of laws.”

Ambassador Joseph highlighted the need for new forms of philanthropic partnership.

Grantmaker associations, he argued, were one important form of partnership. He said there was great value in grantmakers working together to achieve professional development, “as the art of giving takes on the characteristics of a professional guild” in research, to gather and analyse information necessary for the sector’s health and vitality, in communication, as it becomes important to tell the philanthropic story and in discharging public responsibilities.

Effective philanthropy could often best be achieved through collaboration, he argued. “The time is right and the opportunity great for organised philanthropy to take the lead in developing new ideas and new ways of thinking about partnerships. The government sector is too often paralysed by politics and the business sector is all too often preoccupied with profits.”

Such partnerships, he suggested, could include working together through associations to recruit new donors from untapped sections of society, such as rising middle classes and new immigrant communities. “The growth of the community foundation movement... demonstrates not simply the universality of the charitable impulse but the many ways in which the civic culture is changing. It is increasingly clear that where people feel a sense of belonging, they are likely to also feel a sense of obligation.”

An important task for grantmakers and their associations, he said, was to tell the story of philanthropy – who we are and what we do to a curious and sometimes critical public. “There are many grantmakers who do not wish to bring attention to what they do, partly because they prefer to hide their light under a bushel and partly because they do not want to be inundated with grantseekers.”

“Yet I am increasingly convinced that there are more advantages than disadvantages in telling the story of the good that foundations do. Certainly, those who seek to develop or maintain public incentives for giving or just supportive public policy will find that informed publics can be good allies.”

Ambassador Joseph concluded with a challenge “to help create a new world where people from all sectors of society work together to transform the laissez-faire notion of live and let live into the moral imperative of live and help live.”



Telstra Launches New Corporate Foundation

By Carole Fabian, Philanthropy Australia.

One of Australia's largest and best known corporations, Telstra, this month launched a new philanthropic foundation to help children and young people.

The Telstra Foundation, chaired by former Olympic gold medallist and business leader Mr Herb Elliot MBE, has been established with an initial \$5 million Telstra grant. This amount will cover operational costs as well as the granting program.

The new foundation, which will operate independently of its corporate donor, comprises two separate grant-making arms.

Telstra Community Development Fund will make grants to non-profit organisations that focus on helping children and young people, particularly in the areas of social issues, disability, health, research, education, arts and culture.

About 75 per cent of the funds available to the Telstra Foundation will be disbursed through this fund.

Telstra's Kids Fund will provide smaller, one-off grants up to \$1,500 to local organisations and activities in which the children of Telstra staff are involved. The aim of the program is to help Telstra employees get involved in supporting their community, through organisations or activities involving their own sons, daughters, siblings, nieces, nephews, grandchildren or foster children.

These two programs are managed through separate funds, under different sets of criteria and guidelines, and grants for each are allocated at different times.



Herb Elliot, Chairman and Ziggy Switkowski, Director.

Speaking at the Telstra Foundation launch, Philanthropy Australia President, Lady Southey, noted that almost all Australians felt they had a stake in Telstra, and its many shareholders and customers would be justifiably proud of the new foundation.

"This is a permanent commitment to the community and provides a role model to other Australian corporations," Lady Southey said.

"Telstra's philanthropic grants will give some of the many dedicated agencies and individuals working in the non-profit field the time and opportunity to design, explore and test creative, innovative programs aimed at ending, minimising or alleviating the inequities which stop young people from living to their fullest potential."

Telstra Chief Executive Officer Ziggy Switkowski, who is also a Director of the Telstra Foundation, acknowledged the advice and assistance of the philanthropic community, including Philanthropy Australia, in designing the new foundation.

"We have a proud heritage of giving to our society through the many worthy causes Telstra supports" Dr Switkowski said, citing crisis assistance during the NSW bushfires, Telstra Friends (the more than 9,000 Telstra staff who undertake volunteer community support work) and sports sponsorship.

"Early last year a few of us at Telstra sat down and talked about how we might, as a company, give something to our community upon which we depend."

"We wanted an organisation that is not based on Telstra's commercial interests, but acts independently of our business.

"We decided to focus specifically on the core of Australia's future – our children and our young people, who face so many tough challenges including completing their education, gaining employment, issues such as homelessness and substance abuse" said Dr Switkowski.

Herb Elliott, whose community involvement has included board membership of the Alfred Hospital Foundation, Kids Under Cover, Typo Station Outreach and the Richmond Football Club, explained the aims of the new foundation.

"The grants may be directed towards brilliant young Australians to assist them achieve their potential or they may be directed to kids who start behind the eight ball and need help to achieve their potential."

"A higher number of kids than ever before are disenfranchised from family and become homeless, or move into destructive lifestyles. There are many charities that try to deal with the symptoms of homelessness, drugs and juvenile crime, but they are overwhelmed and under resourced.

"And there are many brilliant kids who, because of their environment, are not able to allow their unique high level talent to develop to their own satisfaction and to the benefit of our nation."

"The Telstra Foundation will be seeking to make a difference to the lives of some of these young people and to try to find and deal with causes so that this frightening community trend is reversed," said Mr Elliott.

As well as Mr Elliott and Dr Switkowski, the Telstra Foundation board includes:

- Mr Bill Scales (Telstra Managing Director of Human Resources and Chief of Staff)
- Mr Ross Baxter (Telstra National General Manager, Customer and Internal Relations, Telstra staff representative on the board)
- Professor Fiona Stanley AC (Medical researcher specialising in maternal and child health, Founding Director of the Telethon Institute for Child Health Research)
- Ms Jackie Huggins AM (Author, academic, Deputy Director of the Aboriginal and Torres Strait Islander Studies Unit at the University of Queensland and Co-Chair of Reconciliation Australia)
- Mr Matt Pfahler (Founder and CEO of Typo Station, which provides outdoor wilderness experiences and life skills for young people with challenging behaviours)

The Telstra Foundation's manager is Fiona Moore, who has worked in senior management positions in rural, Aboriginal and women's health organisations. For eight years, Fiona managed the grant-making program of The Stegley Foundation and contributed to strategic developments in the wider philanthropic sector. She has been closely involved in management, advisory and volunteer roles with a wide range of not-for-profit community organisations.

Stegley Foundation Honoured

The Stegley Foundation was made an honorary life member of Philanthropy Australia in recognition of its 'visionary leadership in progressive philanthropy.'

Philanthropy Australia Vice President Dur-é Dara made the presentation to Brian, Sarah and Kristin Stegley at Philanthropy Australia's recent Annual General Meeting.

The Stegley Foundation has closed its doors after nearly 30 years of grantmaking, in accordance with the sunset clause of its original trust deed.

"You may be pleased you're not continuing, but your friends and colleagues in philanthropy and the community sector are not. We are going to miss you terribly," Ms Dara said.

She paid tribute to the vision of the Foundation's original benefactors, Brian Snr and Shelagh Stegley, whose untimely deaths meant that their children had to become youthful trustees.



Fiona Moore, Kristen Stegley, Trudy Wyse, Brian Stegley and Sarah Stegley.

She said the Stegley Foundation had supported Aboriginal communities, people with disabilities, disadvantaged youth, older people and women in ways that gave them a voice in their own lives.

Brian Stegley noted the long relationship between the Stegley Foundation and Philanthropy Australia, including Sarah's membership of the association's board. He said he had elected to remain an individual member beyond the life of the foundation.

"We have always considered our staff our greatest resource, and it's great to see both Fiona Moore and Trudy Wyse continuing to make a contribution in different ways," he said.

Sarah Stegley paid tribute to fellow trustee, Moira Rayner – 'the non-Stegley Stegley' – and two of the Foundation's great inspirations, philanthropist Rivka Mathews and activist for indigenous people, 'Nugget' Coombs. She also thanked the Myer and Reichstein Foundations with whom the Stegley Foundation had collaborated on numerous projects, and a group of young donors who had participated as funding partners in the foundation's latter years.

She called on trusts and foundations to put aside individual agendas and concerns, and work together to achieve real change. "Make every philanthropic dollar a brave one," she said.

Philanthropy Australia National Director Elizabeth Cham noted that while the Stegley Foundation no longer existed, its trustees would continue to make a contribution and their wisdom and experience would be greatly valued.

New Council Member Elected

Following the resignation of the Hon. Warwick L. Smith, Mr Royce Pepin AM BME KSJ of the Lord Mayor's Charitable Fund was deemed to be elected at the Philanthropy Australia AGM to fill the vacancy on the Council. All other Council members have been re-elected or are continuing their terms.

Tax Agenda Moves Forward

A representative sub-committee drawn from Philanthropy Australia's diverse membership has been formed to help develop the next stage of Philanthropy Australia's tax reform agenda.

The first meeting of the committee considered a comparative report on tax environments in the United States, Canada and the United Kingdom.

"The comparative report shows that the Australian environment, given the relative lack of accountability, is fairly advanced," said Philanthropy Australia National Director Elizabeth Cham.

"Australia's tax-deductibility threshold is by far the lowest – for example, in the US a corporate can only receive a tax deduction for five per cent of its pre-tax profit. In Australia, tax deductions are unlimited."

"But where there is room to move with incentives is in the area of payroll deduction and there is a groundswell from the conservation movement for additional incentives to ensure the preservation of critical national habitats."

"Our agenda for future tax reform will be channelled initially through Philanthropy Australia's membership of the Prime Minister's Community Business Partnership tax sub-committee and form the basis of Philanthropy Australia's tax advocacy platform in the coming year," said Elizabeth.

Sub-Committee members include Sylvia Geddes (The R.E. Ross Trust), John Emerson (Freehills), Robin Hunt (Sunshine Foundation), Helen Imber and Marion Webster (Melbourne Community Foundation) and Jan Cochrane-Harry (Perpetual Trustees).

Major Survey of Not-for-Profit Companies

In March, a questionnaire was sent to all companies limited by guarantee that appeared on the public register maintained by the Australian Securities and Investments Commission. The project (funded by the Australian Research Council) is being conducted by Susan Woodward and Prof. Ian Ramsay at the University of Melbourne, with the support of Philanthropy Australia.

The results of this survey will help us advise on whether or not existing company laws adequately meet the particular needs of not-for-profit companies. Information from this survey will be useful for future law reform proposals – for example, any reforms about the 'establishment of an independent administrative body to oversee charities and related entities' as recommended by the Federal Government Inquiry into the Definition of Charities and Related Organisations (June, 2001).

The questionnaire is confidential and the results will only be used for research purposes. While there is room to add additional comments, the questionnaire is largely 'tick and circle'. If you have any queries regarding the questionnaire or require another copy of the questionnaire, please email Susan Woodward s.woodward@unimelb.edu.au

Yorta Yorta High Court Appeal Update

Peter Seidel addressed Philanthropy Australia members in November 2001 on the history and implications of the Yorta Yorta native title claim in western Victoria. The Yorta Yorta were seeking leave to appeal to the High Court.

Peter Seidel is Special Counsel Public Interest Law for solicitors Arnold Bloch Leibler. Here is a summary of his address.

On Friday 14 December 2001 the High Court granted the Yorta Yorta peoples special leave to appeal to it from the Full Court of the Federal Court's decision of 8 February 2001. The appeal is now set down for hearing in Canberra on 23 and 24 May. There are eight grounds of appeal. In summary, they cover whether:

- The majority of the Full Court of the Federal Court's approach to the definition of native title in the Native Title Act was legally correct. According to the majority, native title will only exist if, among other things, there is positive proof that the relevant community has at all times since 1788 maintained the character of a traditional Aboriginal community. The Yorta Yorta will argue that this creates an impossible burden to fulfil and is the wrong approach. The correct approach is whether today's community acknowledges traditional laws and customs, providing them with a connection to the lands and waters in question.
- The majority judgment in the Full Federal Court appeal was legally correct in confirming that Yorta Yorta native title had been abandoned before the end of the 19th century because, among other reasons, no written record then existed of continuing indigenous practices of the kind observed and written about by Edward Curr, a pastoralist residing in the claim area between 1840 and 1860.
- Justice Olney at the trial and the Majority on appeal erred in law by privileging the written record from the nineteenth century over the oral testimony given at trial by 60 indigenous witnesses.

The High Court appeal may become a watershed native title case on whether, beyond the remote parts of the country, native title can have real application for Australian indigenous communities.

Arnold Bloch Leibler extends its sincere appreciation to the staff, Board and members of Philanthropy Australia for their continuing support of the Yorta Yorta, their case and their cause.

Although the Victorian government is opposing the Yorta Yorta High Court appeal, set to commence in Canberra on 23 May around the 10th anniversary of the Mabo decision, and expected to be decided some time this year, it announced on 16 May that it had appointed Tony Fitzgerald, the former royal commissioner into corruption, to mediate the Yorta Yorta claim. The Yorta Yorta are encouraged by Tony Fitzgerald's appointment as they have fought hard for many years to promote a negotiated resolution to their long, ongoing struggle for land justice.

Affinity Groups in Action

Affinity groups provide an opportunity for grantmakers with common philanthropic interests to meet, learn from each other and exchange information. There is potential also for partnerships and other forms of collaborative funding to be developed through these networks.

The convenors of four active Affinity Groups reported their activities to the recent Philanthropy Australia AGM.

Indigenous and Supporting Community Action Affinity Groups

Charles Lane, Chief Executive Officer, The Myer Foundation convenes two Affinity Groups – the Indigenous Affinity Group and the newly established Supporting Community Action Affinity Group. The Indigenous Affinity Group was the first to be set up several years ago and has involved an extensive range of foundations. One of the most recent speakers to address the group was Professor Marcia Langton, who highlighted the need for much better access and support to post-graduate training for indigenous students, and so enhance the capacity of community leaders. The Indigenous Affinity Group is now looking to fund a survey of post-graduate opportunities and impediments facing indigenous students.

The Supporting Community Action Affinity Group is still in its early stages of development. It was established to help respond to the burgeoning of community foundations in Australia, and the re-emergence of a participatory form of community development. Reverend Alistair Macrae will be the first speaker to address the group.

Disability Affinity Group

By Ben Bodna AM, Trustee, The Jack Brockhoff Foundation.

The Disability Affinity Group was auspiced by The Jack Brockhoff Foundation with the following mission and objectives:

Mission

To enhance the capacity of philanthropic bodies to assist people with disabilities by identifying, supporting and disseminating research and initiatives involving best practice relating to services for people with a disability.

Objectives

- To facilitate discussion between members about respective funding policies and features
- To identify and disseminate information on current policies, programs, research and other relevant materials
- To identify and foster the growth of programs which are best practice and can be scaled up to the level required to meet community needs
- To explore opportunities as they arise for joint funding of best practice programs by foundations and other potential funding agencies
- To work towards achieving connections between programs to promote systemic change



Ben Bodna, Trustee, The Jack Brockhoff Foundation; Lady Southey, President, Philanthropy Australia; Dorothy Scott, Executive Secretary, The Ian Potter Foundation and Charles Lane, CEO, The Myer Foundation at Philanthropy Australia AGM.

The Disability Affinity Group, like the other affinity groups, provides a great opportunity to learn, share and achieve things which no one foundation can do alone.

The group has met quarterly during the past year at facilities generously provided by the RACV Club and has heard presentations on key current issues relating to people with disabilities, leadership and advocacy as opportunities for people with disability, and Victorian State government policies for disability services.

The group has together funded a project directed toward facilitating leadership training for people with disability and is presently discussing interest in developing an advocacy framework across Australia.

The present goal of the group is to develop Australia wide involvement in the group by increasing correspondence membership and meetings in other States.

Early Intervention Affinity Group

By Dr Dorothy Scott, Executive Secretary, The Ian Potter Foundation.

At the invitation of Elizabeth Cham, David Osborn from the Sabemo Foundation and I became the convenors of the Early Intervention Affinity Group. We have been going for a year now and our primary purpose is "to enhance the capacity of philanthropic bodies to assist children, young people and families by identifying, supporting and disseminating best practice early intervention research and initiatives." We do not consider funding proposals but it is hoped that joint initiatives may emerge from the work of the group. Approximately six foundations attend regularly and a larger number receive our minutes and informative material. New members are most welcome.

Trusts and foundations have supported some of the most successful initiatives in the fields of child health, education and welfare for over a century. Many of the programs we now take for granted, such as day care centres, came into existence as a result of philanthropic initiatives. However, there have also been instances of foundations supporting programs in complex areas such as youth suicide, drug use and child abuse where

it can be fairly confidently stated that more harm than good has been done, and that this could have been foreseen if those with expertise in the field had been consulted. Sometimes it seems as if grants in this field are made on the basis of the good intentions on the part of the grantmaker and the grant recipient while in medical research, grantmakers use expert assessment and apply greater rigour to assessing applications. There is a strong case for knowledge-based grantmaking in the field of children and families, and the Early Intervention Affinity Group is attempting to address this.

We are interested in how to support initiatives that will facilitate the healthy development of children and prevent a broad range of interrelated problems such as child abuse and neglect, school failure, mental health problems, illiteracy, drug dependence and juvenile crime. Our understanding of early intervention is not limited to early childhood but encompasses approaches that are 'early in the prevention pathway.' However, the overwhelming evidence now available on the critical importance of early childhood for long-term physical, intellectual and emotional development means that this stage of life presents a special window of opportunity for prevention.

For example, the recently emerging research on early brain development shows how stimulating environments facilitate the laying down of the neural pathways in the brain and so help determine intellectual ability. Similarly, the exposure of very young children to trauma, and separations from those to whom they are attached, can be shown to have irreversible effects on their psychological well-being. I see this type of research as potentially having the same impact on social policy in the 21st century as the discovery of the germ theory of disease had on public health in the 19th century.

This knowledge needs to be applied not just because of humanitarian and social justice concerns, but because it is in the interest of the whole society to do so. With an aging population, we need future working-age citizens who are healthy, literate and employable. We will not be able to sustain the growing social and economic burdens of increased crime, drug dependence, child abuse or mental health problems. The return to society on investment in early childhood is enormous with some researchers suggesting that every dollar spent on prevention saves seven dollars in remediation costs downstream.

Our affinity group has been exploring a number of issues:

1. The nature of the system of services. This has led us to be more aware of the complexities of Federal, State and Local Government responsibilities, and the artificial boundaries between health, educational and welfare services for children and families. We have given thought to the changing roles of government, the market and the non-profit sector as we try to define the best role for philanthropy.
2. This has led us to conclude that the best role for foundations is as the yeast for the development of new ideas and approaches that may provide directions for the broader field. How do we assess grant applications for their innovative potential? Is this project new or have others already tried it? What is the evidence to suggest that this project might be effective?
3. If we are backing innovation then we need to assess if it is effective. How do we build in evaluation? Should it be done internally by the grant recipient who is close to the action but perhaps biased toward favourable results, or by external experts? What is the value of quantitative and qualitative approaches to evaluation? What proportion of the project budget should be devoted to evaluation? Usually evaluation is under-funded and this is short-sighted as only well-evaluated initiatives have a good chance of being adopted broadly.
4. How to ensure the sustainability of successful initiatives and how to disseminate successful approaches so that this knowledge may benefit others, are major questions we will be addressing in the near future. The history of philanthropy in Australia has not been very good at dissemination or helping to achieve sustainability for the initiatives we support. We often just walk away and on to the next project. In that respect we are similar to government with an insatiable political appetite for new initiatives. We can demoralise struggling organisations and drain the social capital of fragile communities by starting things that cannot be sustained, and so we need to take care to reduce this risk by establishing from the outset, a sustainability strategy for initiatives that prove to be successful.

We are at a stage in our society when strengthening families and rebuilding communities has perhaps never been more important. There is an emerging awareness of this challenge across the political spectrum. We believe that philanthropy has a vital role to play in meeting this challenge.

Grantmakers interested in joining any of the affinity groups should contact Grant Hooper at Philanthropy Australia by telephoning (03) 9612 9030 or sending an email to g.hooper@philanthropy.org.au

Wingecarribee Community Foundation



Lady Southey, President, Philanthropy Australia, Peter Garrett, Patron, Wingecarribee Community Foundation and Helen McCue, Chairperson, Wingecarribee Community Foundation.

FRRR: Relocated, Consolidated and Looking to the Future

By Natalie Elliott, Foundation for Rural and Regional Renewal.

The Foundation for Rural and Regional Renewal (FRRR) has begun 2002 with a small and dedicated team based in the historic Victorian regional city of Bendigo.

During its first complete year of operation, FRRR allocated \$1 million to 37 different projects. CEO Sylvia Admans has also raised the profile of FRRR with visits to a number of communities across Australia, including remote towns such as Tilpa in the west of New South Wales, Biloela in Queensland and the wheat-belt town of Hyden in Western Australia.

FRRR aims to assist sustainable projects throughout Australia and while its charter is to work with both large and small communities. Ms Admans believes its approach is one that will encourage those from smaller areas to apply for funding assistance.

Ms Admans said that easily accessible communication is one of the most important ways FRRR can make links with communities across Australia. To help this happen, the foundation has a 1800 freecall telephone number as well as a website. FRRR also has no application forms and no official closing dates for communities seeking grants.

"We like people to talk to us, then write to tell us of their community's particular needs. This way we believe we can help those who aren't experienced in seeking funds. What is important is that they know their own community and it's sometimes just a matter of talking that through before an application can come to the foundation for consideration."

Ms Admans said that a recent change bringing rural and regional programs administered by the federal government under the one umbrella of the Department of Transport and Regional Services, will make FRRR's liaison with them a smoother process.

"Programs such as Regional Solutions Program, the Regional Assistance Program (RAP) and specific employment programs are now under one portfolio. Because FRRR often works in cooperation with these programs, for us it is a more efficient way of operating."

Among projects to which FRRR has already contributed funds are those supporting regional enterprise, including the Women in Rural Environment Enterprise Project (WREEP) in central Victoria, which helps women develop or set up businesses and matches them with a mentor. It has also furthered local business and community links with a credit union involved in providing micro finance for some projects being developed.

In Western Australia, in the application category of Community Economic Development, FRRR contributed \$50,000 to the development of the Busselton Jetty



Sylvia Admans, CEO and Ian Sinclair, Chairman, FRRR.

Underwater Observatory, the completion of which will add significantly to the tourism potential of Busselton.

Encouraging the growth of community foundations has been a priority of FRRR since its beginnings and Ms Admans says there is still much interest across the country, especially as established community foundations are talking to other communities about the benefits a foundation can bring.

"As well as the long term results of investing in the community, people are saying that even the feasibility and planning process is proving to be a cohesive way of bringing the community together," she said.

With premises and staff now established in Bendigo, Ms Admans said FRRR's long term goals are to grow awareness of the work of the foundation and develop relationships with those foundations, corporations and areas of government who want to work in partnership with FRRR.

All of the projects receiving funding from FRRR, according to Ms Admans, take positive and practical action towards the renewal and revitalisation of rural and regional Australia.

"FRRR is here to look for creative ways of facing the future, to build on existing strengths and to make a commitment to projects that have a long term value."

The FRRR Team

Located in the Victorian goldmining town of Bendigo in Central Victoria, the FRRR team is made up of CEO Sylvia Admans, whose background is in government and philanthropy, Marketing Manager Natalie Elliott, who brings experience in the community services sector of the Federal Government and Office Manager Dawn Jackson, who has accounting and financial experience. All are from rural backgrounds.

FRRR is the only national foundation committed to assisting rural and regional Australia, and was formed with a centenary grant from The Sidney Myer Fund and the support of the Federal Government through the Department of Transport and Regional Services. FRRR gratefully acknowledges the financial support of the ANZ Bank and The Pratt Foundation.

Feature – Aspiring to Greater Transparency: Are Codes of Practice Cool?

By Carole Fabian, Philanthropy Australia.

To have or not to have a 'code of practice' for grantmakers? And if to have, what should it look like? These have been questions facing Philanthropy Australia members over a number of years. A sub-committee of the national association for grantmakers spent much time and energy developing a proposed code of practice, which has now been adopted as guiding principles only.

To some trustees, philanthropy is a very private business and any limitations on, or scrutiny of their foundation's operations are seen as intrusive and unwelcome. To others, specific policies and guidelines are already highly developed and publicly available, and a sectoral code of practice is seen as irrelevant.

Some members, however, believe that a broad code or at least a set of agreed principles is important for the credibility and influence of the association in particular, and the wider philanthropic sector generally.

Foundations generally enjoy great flexibility. On the one hand, autonomy is a strength, enabling foundations to support diverse projects, to act quickly and often independently of other bodies. Such freedom allows foundations to take risks, to tackle complex problems and to experiment with solutions which no one else can afford to try.

On the other hand, the privacy with which foundations operate can lead to suspicion of their motives and actions. Such independence can be the basis for accusations of elitism, secrecy and pursuing hidden agendas.

Faced with similar issues, other areas of professional activity have developed self-enforced codes of practice.

In the philanthropic world, the development of a self-regulatory framework, codes, guidelines and the degree to which these are enforced, vary considerably around the world.

In Europe

The European Foundation Centre (EFC) began developing a voluntary code of practice for its members as a means of instilling public trust and to prevent government regulation of foundations. It was responding to a very specific circumstance – a proposal by the European Parliament to establish a statutory code of practice for foundations. As a result of vigorous lobbying by the EFC, the European Parliament agreed to drop its proposal and instead called on the foundations to set up a voluntary code of practice. Some of the arguments for and against a voluntary code of practice for grant-making foundations were well summarised by the EFC's Code of Practice Task Force in 1994.

Arguments for a Voluntary Code of Practice

- It would encourage public and private funding (eg. by demonstrating that funds are used wisely for the stated objectives and that professional standards are followed)
- It would encourage government to improve the legal and tax environment for donations (by establishing a means to detect bad practice and sham foundations)
- It would discourage public regulation or statutory codes being imposed
- It would allow foundations to refer to a common set of mutually agreed standards of practice and behaviour, while maintaining their independence

Arguments Against a Voluntary Code of Practice

- Without an enforcement body or appeal procedure, a code of practice could be less effective
- A code of practice is likely to be observed only by those who are already most likely to adopt such ethical principles, unless there are additional incentives
- As foundations have diverse purposes and operate under different circumstances, a code or practice cannot be comprehensive

The EFC Code of Practice Task Force eventually developed a document called 'The Principles of Good Practice.'

The Principles constitute a general recommendation to reinforce good practice, openness and transparency. In response to the thorny issues of diversity and independence, the EFC offers the principles in the hope "that funders will respect the spirit in which they are drafted to the extent that individual circumstances and operating procedures permit."

In the United Kingdom

The Association for Charitable Foundations (ACF), Philanthropy Australia's counterpart in the United Kingdom, has published Guidelines for Funders of Voluntary Organisations, which contain general principles for a range of funders, including trusts and foundations, government and corporate givers.

The 'guidelines', first published in 1997, were developed jointly by independent trusts/foundations and funders from government and the corporate sector. According to ACF Chief Executive, Nigel Siederer, they arose because "independent grantmakers in the UK observed government funders behaving unfairly and thought it was a good tactic to negotiate a code that would apply to all." A consequence of this behaviour was that grant-seeking organisations were seeking emergency help from non-government grantmakers when government funding was unreasonably delayed, refused or withdrawn in what appeared to be capricious ways.

"It is important to note that they are guidelines and not an enforceable Code of Practice," explained Mr Siederer. "They are provided so that all funders will hopefully aspire to them, and follow them as much as individual circumstances and resources permit."

"Our members would resist any attempt to tell them what to do, even by us. We do not see how we could possibly make a code binding," he said.

In the UK, however, there are legally required standards for foundations that do not exist in Australia.

All trusts and foundations are required to publish annual accounts and an annual report. One of these, or some other reconcilable document, must include a list of the main grants – at least the largest grants or however many is necessary to give an understanding of the grant making. There must also be a policy statement or explanation of the grant making, and there are legally required standards to prevent corruption, with a supervising body that inspects the reports and accounts.

In addition to its guidelines, the ACF has also developed a Quality Framework for foundations. This sets out certain standards which foundations are likely to want to achieve. It is divided into those standards which are legally required, those which set out ordinary good practice and a more advanced level. It covers nine issues: Governance, Strategy, Assessment, Monitoring, Communication, Administration, Personnel, Finance and Evaluation.

"Our members have indicated that, despite their diffidence about being told what to do, it is helpful to them to have us set out an optional set of standards in this format," Mr Siederer said.

"This framework is not enforceable and we have no plans to set up a scheme of accreditation or certification based on it, though this has been raised as a possibility for the future. We therefore think the mood may be changing."

In a questionnaire recently completed for WINGS, the ACF stated that it believed the advantages of codes of good practice include improving the public image of grantmakers and clarifying what grantseekers can expect of them – setting boundaries of reasonableness and unreasonableness.

Mr Siederer said that codes of practice were probably only of value when independent grantmakers had a poor public reputation. Codified 'standards' however, were a different matter, and could be helpful in good management of grant-making organisations, even if their contents are not made public.

"There is no means of enforcement on independent grantmakers. Even the sorts of codes that apply in some industries are unlikely to work. Compliance can only be voluntary."

In the United States

In contrast to the offering of these voluntary guidelines, the Council on Foundations in the United States requires all its members to subscribe to its statement of Principles and Practices for Effective Grantmaking, and has done so for 20 years. An advisory committee was recently established to update the code.

At least two regional associations – the Utah Nonprofits Association and the Minnesota Council on Foundations (MCF) also require their members to formally sign a code of ethics.

The MCF's principles were adopted in June 1996 after 15 months of controversial debate. There are eight principles which are binding on members, plus an accompanying five page statement of practices which are recommended as a guide.

During the process of developing its guidelines, the MCF identified four main points that grantseekers in particular felt were important for foundations to articulate and commit to:

1. Tell us the rules of the game.
2. Follow them.
3. When you don't, let us know.
4. Talk to us – use clear written communication and be accessible when we have questions.

"Our conviction, that a common set of principles could build trust both among members and with the public, ultimately carried the day," writes Michael O'Keefe, Chair of the MCF Task Force on Standards and Practice.¹

"Some on the task force insisted that, without some bite, it was not worth the bother to have the principles. Others thought such a condition was unreasonable for a voluntary organisation and would turn some members away.

"They made it clear that they did not want a document that dictated their behaviour but liked having a set of benchmarks to educate themselves and communicate with grantees."

In the end, the two separate documents – one mandatory, the other voluntary, provided a compromise position. As the Council is not a policy agency but a voluntary association, enforcement depends largely on the good will of each member.

Feature – Aspiring to Greater Transparency: Are Codes of Practice Cool? (continued)

Mr O’Keefe writes that the greatest benefit of the process was discussing the complex issues that lie beneath seemingly straight forward principles. “That discussion forced us to examine our values, obligations and relationships with the community. It was more heated and far more interesting than we imagined it would be.”

“We heartily recommend such a discussion to our colleagues in philanthropy,” Mr O’Keefe said.

Into the Future

Worldwide Initiatives for Grantmaker Support (WINGS) have recently sent out a questionnaire to member associations, seeking their views on the advantages, disadvantages and essential elements of codes of practice for grantmakers, and is testing the water to see if there is a demand for an international code.

Meanwhile, here in Australia, if there is a demand for even a national code, it has been muted.

Unlike in Europe, there is no imminent threat in Australia of increased government regulation. In fact Australian philanthropic foundations enjoy far greater freedom from scrutiny and regulation than almost anywhere in the world. It could be argued that one way of ensuring that this situation continues is to demonstrate a willingness by the sector to voluntarily regulate itself.

The philanthropic sector in this country has generally improved its organisation as a sector, has begun to make itself heard in the corridors of government and the corporate world, and has taken a leading role in the debate about civil society and the public policy agenda.

So why are Australian trusts and foundations less than enthusiastic about a code of conduct or practice for grantmakers, and what are the potential benefits of such a document?

According to National Director of Philanthropy Australia, Elizabeth Cham, these questions can only have meaning in the context of a broader debate about the nature of philanthropy: is it public or private money?

“If we decide that it is indeed public money, because of the tax concessions granted to trusts and foundations, then looking at ways to increase transparency and accountability will naturally follow,” she said.

Ms Cham acknowledged the importance for foundations of retaining individual policies and guidelines as well as independent and unique ways of operating.

“The need for some sort of code is not about telling anyone what to do – it’s about protecting the whole sector from accusations of arbitrary decision making, opaqueness, secretiveness and at the worst extreme, misappropriation.”

According to those who favour a broadly applicable code, such a document would clarify the rights, obligations and expectations of grantmakers, grantseekers and the broader community.

This would benefit grantmakers by ensuring they received far fewer inappropriate applications, and by potential recipients gaining a clearer understanding of what to expect from the relationship with private donors.

“It is incumbent upon an organisation like this to look at developing something that the public can look to. It provides a professional face to the community,” said Ms Cham.

“Having a document probably doesn’t alter behaviour, but it’s an important process to have, to not only be accountable, but to be seen to be accountable.”

As Michael O’Keefe from Minnesota says, “If the foundation community continues expanding – which is likely with the coming generational transfer of wealth – we can expect every more attention from the public, the press and legislators. Evidence that we have addressed issues of accountability and have committed ourselves to publicly stated principles and practices will put us in a stronger position to withstand the spotlight.”

1. ‘Letter from Minnesota: Rules to Give by’ in Foundation News and Commentary, Council on Foundations, November/December 1997 Vol 38, No 6.

Feature – Aspiring to Greater Transparency: Philanthropy Australia Code of Practice

Code of Practice Adopted at AGM

Philanthropy Australia adopted a voluntary code of practice at its Annual General Meeting for 2001, held in April 2002.

Modelled on voluntary codes implemented by overseas grantmaker associations, and following consultation with members, the Council of Philanthropy Australia decided recently to follow international best practice by adopting a voluntary code of conduct.

“A voluntary code of practice, which seeks to increase the professionalism, accountability and transparency of Australian foundations, is in the interests of our sector,” said Philanthropy Australia National Director Elizabeth Cham.

“Our members, rightly, expect a high level of accountability and transparency from the organisations they fund. It makes sense for Australian foundations to seek to follow the same standards. The result will be increased public trust in, and respect for, our members.”

“Voluntary codes of conduct are not set in stone. In the future, I hope there will be lively debates within the sector about what should, or should not, be included in a code of practice. Philanthropy Australia’s code is voluntary, but it sets some useful guidelines which I hope will be of assistance to our members.”

Code of Practice

1. Introduction

This voluntary Code of Practice constitutes a recommendation to full Grant-making Philanthropy Australia members (as defined in the Constitution). Its aim is to encourage best practice, openness and transparency in all aspects of grant-making by these member organisations whether they are family foundations, corporate foundations or corporate giving programs, community foundations, private foundations or government-initiated foundations.

2. Principles of Good Practice

This code is based on some key principles about grant-making in Australia which Philanthropy Australia commends to its members. These include:

- Acknowledgment by grantmakers of the importance of operating in accordance with the wishes of founders who provided initial capital, or in the case of community foundations and corporations which are dependent on multiple donations, the wishes and concerns of these donors.
- Commitment by grantmakers to the development and promotion of innovative, flexible and effective responses to specific social, cultural, environmental, educational, scientific, health and economic challenges in today’s society.

- Acceptance by grantmakers, that in fulfilling their particular role in helping build a just, sustainable and pluralistic society, it is important that there is openness, transparency, integrity, accountability and self-regulation in the provision of resources to grantees.

3. Legal Responsibilities

All boards of grant-making members of Philanthropy Australia should be aware of the legal duties and obligations imposed on grant-making member trustees. In summary, the major duties imposed on a trustee comprise:

- The duty of the trustee to avoid conflicts of interest – a trustee should not put himself or herself in a position where the trustee’s own interests conflict with the interests of the beneficiaries
- The duty of the trustee not to make a personal profit from the position of trustee
- The duty of the trustee to act in the best interests of the beneficiaries
- The duty of the trustee to comply with the relevant trust instrument – the trustee should be familiar with the terms of the trust instrument
- The duty of the trustee to use ordinary business prudence when investing funds on behalf of the trust
- The duty of the trustee to seek advice where the trustee is unsure whether he or she is complying with one of the above duties

Additional duties may apply if the grant-making member trustee is a corporate trustee. The board of a grant-making member that has corporate trustees should therefore be fully appraised of and comply with such additional duties.

The above is not intended to be a complete explanation of the legal principles that apply to trustees. If boards of grant-making members have any doubt as to which duties apply to them or whether they are in compliance with particular duties, the board should seek independent advice.

This code of conduct is a voluntary code. However, adherence to the code by grantmaking members will ensure that members have a high standard of corporate governance that will in turn foster good practices and enhance public confidence in the integrity of the member.

4. Procedures

Clarity of Purposes

Grant-making organisations should define clearly their purposes and the purposes for which they provide grants and review these on a regular basis.

Communicating to the public and to applicants/ grantseekers these purposes and the procedures that are followed in grant-making is in the interest of all

Feature – Aspiring to Greater Transparency: Philanthropy Australia Code of Practice (continued)

concerned. Effective communication is important if the grant-making process is to function well and if trust in the responsibility and accountability of grantmakers is to be maintained. Wherever possible, grantmakers should disclose appropriate information regarding their grant-making practices, including geographic and policy limitations and procedures and timetable for making grant decisions.

Grantmakers must comply with the Privacy Act (Commonwealth). They should respect the confidentiality of applicants, grantees and donors and use discretion in communicating with others about specific organisations and individuals.

Grantseekers should be advised of the monitoring, evaluation and reporting requirements associated with receiving a grant.

Grantmakers need to be alert and responsive to changing conditions in society and to the changing needs and merits of particular grant-seeking organisations. Grant-making organisations are encouraged to seek ideas and comments from a variety of independent sources with appropriate knowledge and expertise to add to the input from staff and board members.

Governance

Grant-making organisations acknowledge the importance of having an identifiable decision making body (hereinafter called 'the board') whose members should be nominated and for which succession arrangements for members are made in accordance with legal requirements, established principles and procedures.

Grantmakers also recognise the need for the clear definition of:

- obligations of their board
- decision-making procedures within the organisation
- the provision of authority to speak on behalf of the organisation

Grantmakers undertake to inform the general public about their activities in ways commensurate with the size of grantmakers operations. This may include periodic reports, preferably annual reports, possibly supplemented by newsletters, articles and the use of other communication channels such as websites.

Grantmakers must comply with obligations and restrictions at relevant states/territories and other jurisdictions in which they operate.

Grantmakers should ensure their management practices, investment strategies and use of resources are prudent.

Grantmakers should ensure appropriate internal control of resources and internal monitoring that would ensure the integrity of their grantmaking process.

All grant-making organisations should review their purposes and organisation structures and assess the overall results of their grant-making from time to time. Consistent with the provisions of the legal establishing instrument of the board, grantmakers should review the structure and membership of the board from time to time.

In addition to the legal requirements that forbid staff, board members and their families from profiting financially from any philanthropic grants (See Section 3) it is important that grantmakers weigh carefully all circumstances in which there exists the possibility of accusations of self-interest. In particular, staff and board members should disclose to the board the nature of their personal or family affiliation or involvement with any organisations for which a grant is considered, even though such affiliation may not give rise to any pecuniary conflict of interest. This may lead to the development of an appropriate conflict of interest policy for board members and staff.

Grantmakers are encouraged to maintain interaction with others in the field of philanthropy including Philanthropy Australia and its associated affinity groups as well as relevant state and national organisations. Grantmakers are encouraged to share with others responsibility for strengthening the effectiveness of the many private and corporate philanthropic initiatives that serve the needs and interests of the Australian community.

Feature – Aspiring to Greater Transparency: Publishing an Annual Report

The William Buckland Foundation Takes the Plunge

By Carole Fabian, Philanthropy Australia.

Annual reports are usually the quickest and most accurate sources of information about any public company or organisation. Yet very few charitable foundations publish such a document.

The William Buckland Foundation will shortly publish its first annual report complete with financial statements, making it one of the only philanthropic foundations in Australia to do so. (There are some who publish disbursement reports).

Professor Bob Officer, formerly Deputy Director of the University of Melbourne's School of Business, has been a member of the board of trustees of the William Buckland Foundation since 1995.

He explained that accountability, efficiency and evidence of efficiency were principles as important for non-profit organisations as for government or profit-making entities.

"I believe we owe it to the community to present a set of audited accounts," he said. "Having tax-exempt status brings with it a responsibility to demonstrate that we are fulfilling our duties, that we are efficiently managing the funds as trustees."

Tax-exempt status also meant that philanthropic funds could not be considered as purely private money, according to Professor Officer. There were in fact very few organisations that could claim to be entirely private and therefore say that their financial affairs were entirely their own business.

Professor Officer said he believed that financial reporting should be expected, if not legally required, of all charitable organisations, including philanthropic trusts and foundations.

He said he understood that there might be some fear of additional expense in going down the path of publishing annual reports, but he believed that in most circumstances the benefits would outweigh the costs.

The William Buckland Foundation was happy to be visible and publicly transparent. Being better known did not lead to a problematic flood of unwanted applications, according to Professor Officer.

"I think you've got to use better filters than lack of information to sort out who you want to support," he said. "We're already quite well known, and I see that as a plus. I'd much rather receive hundreds of applications than a few. That way you're more likely to find the best and most deserving projects."

In fact, annual reports which outline funded projects can provide a better context than guidelines for people to understand the work of the foundation, leading to more appropriate applications.

Professor Officer said he believed the William Buckland Foundation, like all organisations, should operate as efficiently as possible, and one way of encouraging this efficiency was through transparent and accessible reporting.

One of the benefits was sharing information with similar organisations. "Hopefully we can set a benchmark, but also we could benefit from using benchmarks set by others," he said. "I'm sure there are organisations out there that we could learn from, and access to their accounts and reports would assist us."

"When you can see what they're doing, you can emulate them and improve your own performance. That is being able to look at cross-sectional performance, at a particular point in time across a number of organisations."

"Reporting of longitudinal performance, or how an organisation was performing relative to previous years can be a pretty good benchmark to make sure your systems are operating consistently and effectively."

Professor Officer said that ultimately the purpose of greater efficiency was to achieve better outcomes. "At the end of the day what we're interested in is outcomes. Efficiency leads to having a bigger pie, that is, more resources, but you should never lose focus on the outcomes you're after."

He said that the William Buckland Foundation had incrementally achieved increased efficiency and hence better outcomes through networking and access to a wider range of grantseekers and projects.

"Our relationship with Philanthropy Australia and the assistance we get there is improving each year as their networks get better," said Professor Officer.

"Similarly on the investment side, I think we've got more sophisticated and better managers for our funds, which means we've been able to extract a little more from our investments."

The William Buckland Foundation's commitment to publicly available information about itself is a logical extension of its policy of report distribution in recent years.

"We seek reports from those we fund, including interim reports, which encourage people to set their own benchmarks," Professor Officer explained.

Many William Buckland Foundation grants have included specific allocations for published project reports, which are distributed by the Foundation to a list of people and organisations nominated by the grant recipient.

"We try to get maximum leverage out of a project," said Professor Officer, "so that it creates an awareness of what can be done. Often what begins as an 'experiment' that we can fund because we have the flexibility, can be taken up in a more extensive, longer term way by the wider community or even government once we are able to demonstrate the benefits. If you can do that, it's a big plus, and we look for that wherever we fund."

The William Buckland Foundation has again taken the lead, this time by example. Perhaps by publishing its own annual reports, it will encourage other philanthropic foundations to take up the challenge of aspiring to greater levels of accountability and transparency.

Civil Society Forum Post September 11: An Australian Philanthropic Response

*Summary by Grant Hooper and Carole Fabian,
Philanthropy Australia.*

Philanthropy Australia organised a members' forum in Melbourne in November 2001 following the events of September 11 and the Tampa incident.

The forum was held to discuss such questions as maintaining tolerance and diversity in Australian society, civil liberties and the importance of the rule of law to our political and social system.

"Our member trusts and foundations are committed to strengthening Australia's civil society, so we wanted to provide an opportunity to express their hopes and desires about the type of society in which they want to live, and re-commit themselves to a society with genuine tolerance of differences within its population," National Director, Elizabeth Cham said.

Sir Gustav Nossal chaired the meeting, stating his hope for sober reflection on the root causes of terrorism. He said that hatred and prejudice grew where poverty, inequality and ignorance thrive, and he urged philanthropic foundations to work towards the promotion of a society that favours tolerance.

Sir Gustav remarked that the problem of refugees and displaced persons is a worldwide one involving millions of people, only a small proportion of which are attempting to come to Australia.

Yasser Soliman, President of the Islamic Council of Victoria explained that the Islamic community in Australia felt under strain even before the events of September 11, owing to media reporting of the 'refugee crisis' and the Taliban in Afghanistan.

Mr Soliman said that the attacks on September 11 were a crime against humanity and God, and had nothing to do with the teachings of Islam. He stated that some in the Muslim world preach hate and intolerance, as do some people from all backgrounds.

He explained that the Taliban were the children of decades of war, and that they fed off existing injustices to produce an equally unjust result. Mr Soliman urged that the Western response must not generate more sympathy for the Taliban amongst those suffering the consequences of injustice.

Mr Soliman said Muslims were frequently stereotyped in the Australian media. He cited a study whose preliminary findings indicated that the words 'Muslim' or 'Islam', appeared frequently in Australian press headlines accompanied by words such as 'death', 'die', 'kill', etc. Australian Muslims, women in particular, were victimised on a regular basis. Many Muslims were afraid to report incidents of violence and as a result lived in fear.

Mr Soliman stated that the majority of Australians had been supportive of the Islamic community. The Islamic Council of Victoria was working with the police, government and other community groups, to develop plans for the protection of the Islamic people, their mosques and community centres. It was hoped that this will be a bridge-building exercise to cement relationships between faiths.

He explained that there was a need to train teachers and Muslim leaders to help those needing counselling and support, as well as a need to keep an open dialogue between Muslims and non-Muslims not only at times of crisis but at all times, so that understanding is a way of life.

Chris Maxwell QC, President of Liberty Victoria (formerly the Victorian Council of Civil Liberties) described the Prime Minister's statement about refugees allegedly throwing children into the ocean, and that he didn't "want people like that in Australia" as the most shameful statement by an Australian public figure in recent times.

The Australian public, and the philanthropic sector, now had a challenge and an obligation to react to these events with compassion. Mr Maxwell said the media and some sections of the public had tended to demonise asylum seekers so as to negate any compassion for them and allow people to feel no compunction about turning them away.

Reasons for optimism, according to Mr Maxwell, included the rule of law in Australia. While the government had refused the Tampa asylum seekers access to solicitors, the writ of habeas corpus enabled them to gain access to the legal system. Mr Maxwell explained that we had a proud tradition of independence of courts and tenure for judges, which were never more important than when the rights of a minority were in question.

Mr Maxwell commented on the shock of discovering that hatred and ignorance also grew in affluent societies, as characterised by the antagonism of many Australians towards asylum seekers.

He said that freedom of speech was now a real issue and that the voice of liberty must continue to be heard and our freedoms defended. Public education and advocacy were needed so that the community could stand up for the rights of different points of view to be considered.

Philanthropy in Action: The Myer Foundation – Supporting Asylum Seekers and Refugees

The Myer Foundation Lends a Hand

By Carole Fabian, Philanthropy Australia, with assistance from Charles Lane, The Myer Foundation.

The Myer Foundation began responding to the needs of refugees and asylum seekers some time before they became a hot political issue in Australia.

The Foundation's courageous and timely response has been due in no small part to its own heritage, and the experiences of its founder.

Simcha Baevski, later known as Sidney Myer, himself reached Australia's shores by boat, a refugee from poverty and the Jewish pogroms in his birthplace of Belarus.

One hundred years later, his children, grand-children and great-grand-children together with their spouses are members of the Foundation created from the fruits of a successful life in Sidney Myer's adopted country.

The Myer Foundation recently undertook a policy review, and renewed its commitment to supporting a compassionate multicultural Australian society. A specific interest in the welfare of refugees and asylum seekers was recognised as fitting well into the Foundation's policy of looking 'beyond Australia' in recognition of this country's place in the world.

In November 2000, The Myer Foundation helped fund a conference in Perth, convened by the Refugee Council of Western Australia, to look at what was actually happening in the field, at current policies and their impact upon refugees and asylum seekers. Papers were presented by the Chief Justice of Western Australia, several Federal Court judges, lawyers, DIMA officials and NGO representatives, including Refugee Councils and the Red Cross, who are working directly with refugees and asylum seekers.

A report highlighting the range of issues that came out of that meeting, *'Refugee Law, Policy and Practice in Australia'* was subsequently published with the Foundation's assistance, and launched by former Prime Minister, Malcolm Fraser, at the Immigration Museum in Melbourne.

Through the conference and launch, The Myer Foundation made contact with a range of other people active in supporting and assisting refugees and asylum seekers. These contacts led the Foundation to support and collaborate on a number of projects.

"The Myer Foundation hopes that by contributing to these initiatives we not only help refugees and asylum seekers enjoy a more secure and reasonable life in this



Malcolm Fraser, former Prime Minister.

country, but that we can also help influence the debate and future public policy," said Chief Executive Officer, Charles Lane.

At a personal level, at least two Foundation trustees have become actively involved in the recently formed organisation, Australians for a Just Refugee Program – Carillo Gantner, who is a patron, and Joanna Baevski.

Some of the projects supported by The Myer Foundation in this area include:

Asylum Seeker Resource Centre (ASRC) Victoria (Employment of a Project Manager)

The ASRC began in June 2001 when a group of Victorian University of Technology welfare students established a material aid drop-in centre as part of an assignment. Staffed entirely by volunteers, the ASRC provides a range of services for Temporary Protection Visa holders and detainees at the Maribyrnong Detention Centre. Currently, federal government policy prevents many asylum seekers from access to essential social services including Medicare, English lessons and special benefits payments. Since its establishment, 1,500 asylum seekers have been provided with services including food, material aid, referrals, legal aid, counselling, English lessons, health services, advocacy and general support. One of their key programs is the 'friendship program' which pairs a volunteer with a detainee at the Maribyrnong Centre. All volunteers, including drop-in centre workers, receive three to six weeks training, are screened for eligibility and have access to a counsellor for debriefing.

Australians for Just Refugee Programs Inc (AJRP) NSW (Support for National Co-ordination and Establishment)

This is an umbrella organisation for a range of people and initiatives supporting policies toward refugees and asylum seekers which reflect respect, decency and traditional Australian generosity to those in need, while advancing Australia's international standing and national interests.

Philanthropy in Action: The Myer Foundation – Supporting Asylum Seekers and Refugees (continued)

The AJRP has adopted six core purposes:

- To build community support for its goals through education and media campaigns
- To promote national communication
- To foster and lobby for alternative policy models
- To promote constructive debate and cooperation
- To provide resources to support other initiatives

The immediate priority is to build a credible national body with a broad range of participants, supports and patrons.

Justice for Asylum Seekers (JAS) Alliance, Victoria (National Networking Website)

JAS is a state-wide coalition of organisation working with asylum seekers. It includes over 20 community and religious groups such as Catholic Commission for Justice, Development and Peace, Amnesty International and Ecumenical Migration Centre.

A national website is intended to maximise knowledge, resources and experience, in the areas of refugee reception, advocacy and communication. Work has already commenced on a national database of refugee organisations and groups. The project is also supported by Pilotlight Australia, Sputnik Media, Bankers Trust and some Sydney lawyers.

Refugee Council of Australia (Employment of a Researcher and Policy Workers)

The Council is the peak non-government organisation for 120 organisations involved in refugee matters. Primary activities are research, policy analysis and advocacy. Because the Council is located in NSW, it wishes to establish a new Victorian division, to work with Victorian agencies, conduct research and enhance public knowledge of refugee issues.

The Council is one of five organisations represented on the Federal Minister's Advisory Committee on Immigration.

Refugee and Immigration Legal Centre (RILC) Inc, Victoria (East Timorese Pro Bono Legal Representation Project)

RILC is a community legal centre which provides free, expert representation and advice to asylum-seekers and vulnerable immigration applicants. The centre already provides pro bono legal representation to 650 East Timorese asylum-seekers, but cannot continue to provide such assistance to this number of people. The Pro Bono Legal Representation Project will link volunteer lawyers with asylum seekers.

National Ethnic and Multicultural Broadcasters Council (NEMBC) Inc – Victoria (Access and Participation Project for Refugees/ Emerging Communities)

NEMBC is the peak organisation for volunteer ethnic community broadcasters. There are 48 regional and 39 metropolitan stations across Australia producing 1,600 hours per week of local programming in 98 languages. Funded largely by the Federal Department of Communication, Information Technology and the Arts, NEMBC manages Australia's biggest provider of broadcast training, the Australian Ethnic Radio Training Project and Australia's first multilingual news service, the Ethnic News Digest. Radio programming can play an important role in providing settlement information, bridge isolation and cultural dispossession and contribute to community development. The objective is to build a responsive community information network that will increase awareness of existing services and programs for refugees, and support newly arrived asylum seekers and settlers.

Philanthropy in Action: ruMAD?

By John Davidson, Education Foundation.

An exciting initiative from The Education Foundation is helping kids to change their world through understanding the importance of 'giving back' to the community.

ruMAD? stands for 'Are You Making A Difference.' It challenges schools to identify a problem in their local or global community, and then take planned, manageable steps to right it in a way that has real and lasting impact, instead of band-aid or quick-fix solutions that don't necessarily address the underlying issues.

The program was begun by the Stegley Foundation and developed with support from The Myer Foundation, William Buckland Foundation, Paul Edward Dehnert Trust through Perpetual Trustees, CEPA Trust (Council for the Encouragement of Philanthropy in Australia) and individual donors wanting to inspire a culture of philanthropy among students.

Two examples give a snapshot of ruMAD? in action.

At Myrrhee Primary School in north east Victoria, students surveyed local shoppers and stores and found that 40,000 plastic bags were consumed each week in their district. They researched viable alternatives and eventually located a King Island company that produced low cost calico bags. With advice from well known entrepreneurs Dick Smith and Big Kev they negotiated with local businesses, generated media publicity and directly influenced 57 per cent of local families who now use alternatives to plastic bags when shopping.

The students were supported by their teachers through this process, using the ruMAD? Program to initiate and develop their work.

Melbourne Girls' College, in a different context, has established the first MAD Student Foundation in Victoria – launched 7 November 2001. With support from Principal Jan Parkes and the Director of Girls' Leadership at the College, Nia Holdenson, the students worked through the ruMAD? Foundation's manual, met regularly and consulted the school bursar regarding GST/Tax requirements prior to starting the Foundation. An Advisory Board of parents (lawyers, bankers, accountants) and local government members was created to give support and advice.

The girls have raised \$2,500 through sausage sizzles, a 'Footy Day,' Free-Dress days, as well as Chupa Chups/Caramello Koala drives. Charles Lane and The Myer Foundation agreed to match those funds.

This year's challenge for the Melbourne Girls College Student Foundation is to manage the application and selection process required for their funds' distribution. Nia Holdenson says the girls demonstrated determination, perseverance, leadership, communication and decision-making skills.



Launch of ruMAD? at the Grange College, Hoppers Crossing.

The Grange P-12 College has also established a Student Foundation. Other projects include multiage teams working on 'healthy relationships' and anti-bullying strategies, a school-local council partnership hoping to re-energise the Kensington Women's Peace Garden, and the use of community projects as the basis for 'authentic assessment tasks.'

ruMAD? was developed and trialled through 2000/2001 by a taskforce including representatives from Victorian curriculum associations, DET, Catholic Education Office and the Independent sector, Teacher Unions, Koorie and Ethnic organisations, VCOSS and the VLGA. It is now being developed across the state by the Education Foundation with a part-time Project Coordinator and a full time Schools Coordinator. The latter is a teacher seconded to the Education Foundation under the 'Teacher Release to Industry Program,' a joint venture of DET, the Australian Education Union and the Victorian Employers' Chamber of Industry and Commerce.

Free web-based teaching materials (lesson plans and guides, hypothetical scenarios, how-to-do-it master sheets and so on) help teachers introduce the Program to their students, fitting easily into the existing curriculum and linking schools to the community through self-generated 'MAD' projects.

The projects proceed through the four stages of research, planning, action and evaluation and include a strong component aimed at publicity, celebration, sharing and inspiration for others. These MAD projects also develop a sense of realistic achievement amongst participants by drawing on the students' 'time, talent and treasure.'

This year, over sixty schools (including three from interstate) registered to participate in the inaugural 'MAD Day' – aiming to 'make a difference' with small-scale activities across topics as diverse as school bullying, racial harmony and saving orangutans. A number of these schools are developing more in-depth projects throughout the year.

Member File: The Geoffrey Gardiner Dairy Foundation

By Garry Fabian.

The Geoffrey Gardiner Dairy Foundation recently became a member of Philanthropy Australia.

The foundation, established in October 2000, is working actively to help increase the international competitiveness of the Victorian dairy industry.

The foundation was named after Geoffrey Gardiner, a Victorian dairy farmer and prominent industry leader who passed away in 1999. In addition to his role as a Vice President of the United Dairyfarmers of Victoria, he was actively involved in many industry organisations including the Australian Dairy Farmers Federation, Victorian Dairy Industry Authority, Australian Milk Marketing and Food Quality Services and various committees for the Victorian and National Farmers Federations.

By carrying the Gardiner name, the Foundation hopes to continue to inspire dairying families to be advocates for their industry with pride and focus on the future.

The Geoffrey Gardiner Dairy Foundation has assets in excess of \$60 million, which are managed by reputable funds managers. Grants are made to projects which aim to improve dairy industry competitiveness. Funding may include such areas as:

- Research, development, extension, technology transfer
- Education, training, skill development
- Projects benefiting Victorian dairy communities
- Other activities which improve dairy industry productivity and competitiveness in accordance with the Victorian Dairy Act

The major criteria for determining funding applications are:

- Provide a benefit to at least one major sector of the dairy industry (farming, processing, manufacturing sector)
- Provide a clear benefit primarily to the Victorian dairy industry
- Have clear objectives and measurable outcomes, within clearly defined time frames

Its members are the Australian Dairy Products Federation, United Dairyfarmers of Victoria and the Milk Processors Association of Victoria Inc.

The members of the Foundation's board comprise a Chairman and four directors, overseeing its operations.

Their first round of funding saw an allocation of \$1.3 million to 35 projects, which included conference funding, a Co-operative Leaders Study Tour, improved

soil and irrigation management, practical health and safety management for dairy farmers, tailoring cheese flavours by understanding biochemistry processes in cheese maturation, bursaries to support an industry developed program – *the Advanced Diploma in Dairying* – to name just a few of the broad range of supported initiatives in the dairy industry.

The chairman of the foundation, Mr Chris Nixon said he was delighted by the variety and high standard of the project proposals received.

"We believe that the projects we have funded have the capacity to help the dairy industry as a whole. Topics covered by the projects range from on-farm productivity, milk quality and processing issues to technology transfer and community leadership," Mr Nixon said.

He went on to say, that in addition to this round of funding decisions, the foundation was also actively building partnerships to allow more complex and longer term projects to be undertaken for the benefit of the dairy industry.

Foundation Director, and former United Dairyfarmers of Victoria president, Max Fehring said that it was particularly pleasing to see the strong focus of community development projects underlying the applications.

"It's all about helping dairy farm families and communities cope with operating in a very competitive world. These projects will help them bring about changes they want in their lives," Mr Fehring said.

The latest initiative by the foundation is new funding for long term research and development programs. This will be directed to those assessed as likely to deliver significant economic benefits to the industry, with financial support of \$250,000 annually for up to five years.

Announcing the new funding initiative, Mr Nixon said that the foundation was looking to support major long term projects that could make a quantum difference to the international competitiveness of the dairy industry.

"We recognise that major technological breakthroughs are difficult to achieve. We are confident however, that with the appropriate skills and resources, strong financial backing and enough time, there is the opportunity to achieve major advances."

Applications for these grants are invited from Universities, State Departments, Cooperative Research Centres, private companies and any other groups with innovative ideas and the networks needed to assemble effective partnerships between research groups.

Resource Centre Briefing

Philanthropy Australia's Resource Centre

By Louise Arkles, Resource Centre Librarian.

Philanthropy Australia's Resource Centre contains Australia's most extensive collection of books, journals, articles and press clippings on philanthropy and related topics, including subscriptions to Foundation News and Commentary, The Chronicle of Philanthropy, Voluntas and Third Sector Review.

Philanthropy Australia members and Resource Centre subscribers have browsing and borrowing rights to the Resource Centre collection. Non-members should call Philanthropy Australia and speak to Louise Arkles or Vanessa Meachen to arrange a day pass to access the collection, which is available at a cost of \$15 per day. If you would like to visit the Resource Centre, please call ahead on (03) 9620 0200 to ensure that someone will be available to assist you to locate the resources you require. Materials can also be accessed via inter-library loan.

This issue of our Resource Centre Briefing focuses on resources dealing with accountability, transparency and ethics which are available in the Resource Centre. All of these resources originated overseas, which is indicative of the fact that *Australian Philanthropy* has yet to debate these issues publicly. Unlike the UK, US, NZ, South Africa, Canada and Europe, Australia has no code of governance and accountability for foundations. Locally, most interest in accountability stems from financial accounting and appears confined to fundraising organisations. References to accountability are more likely to be found in discussions of corporate citizenship than traditional philanthropic foundations. In terms of promoting the need for greater transparency and accountability, resistance from the sector is not unexpected. Given the lack of legal requirements for foundations to publish annual reports, and the cultural tradition of minimal, low-key publicity for philanthropic activities in Australia, the culture of privacy may be hard to shift.

Accountability, Transparency and Ethics Books

Towards Voluntary Sector Codes of Practice: A Starting Point for Voluntary Organisations, Funders and Intermediaries

Julian Ashby

Joseph Rowntree Foundation, 1997

The theme of this book is meeting the challenge to be clear and explicit about the issues and relationships which govern the voluntary sector service providers, the intermediaries who support them, and the funders, regulators and purchasers of their services. It discusses such problematic issues as confusing effectiveness with economy, reconciling independence with accountability, reconciling voluntary action with staff and standards, user involvement, conflicting views on governance, combating continuing inequalities and competing social and business objectives.

Responsible Family Philanthropy: A Resource Book on Ethical Decisionmaking for Family Foundations

Michael Rion

Council on Foundations, 1998

Nonprofit Governance: Steering Your Organisation with Authority and Accountability

Berit M. Lakey

National Center for Nonprofit Boards, 2000

Telling Our Story: Accountability for Family Foundations

Colin G. Campbell

Council on Foundations, 1996

Articles from Foundation News and Commentary

A Decent Disclosure. Foundation executives comment on whether foundations should provide information about their grantees to other funders or offer an explanation of their role in the failure/success of the programs. Mar/Apr '00, p. 52.

Ethics 101. The David and Lucile Packard Foundation gave the Institute for Global Ethics a grant to produce an ethics training program for charitable foundations. Jan/Feb '99, p. 10.

Ethics: Family Foundation Feud. What to do when family members are split on a family foundation's direction. Jan/Feb 01, p. 44.

Ethics: Feeling Conflicted. Three grantmaking executives respond to a hypothetical situation uncomfortably close to self-dealing. Nov/Dec '99, p. 38.

Ethics: Set Up or Support? Are foundations unfairly leading organisations 'down the garden path,' raising expectations that can't always be fulfilled? Nov/Dec, p. 36.

Finding 'A Moral Minimum.' Should funders deny grants to organisations with policies that may be discriminatory? Nov/Dec '99, p. 42.

First, There's Theory. Then There's Practice. Eight ways foundations can learn from the experiences of business, government and other nonprofit institutions that have grappled with accountability. Mar/Apr '01, p. 37.

Judging Our Peers. A recent convert to the idea of peer review for board members explains why he thinks all foundations should have a system for assessing board member performance. May/June '98, p. 20.

Mutual Accountability and the Wisdom of Frank Capra. Accountability is a two-way street. Here's what acting on that belief might entail. Mar/Apr '01, p. 42.

Rules to Give By. The story behind how the Minnesota Council on Foundations drew up a code of ethics for its members and persuaded them to commit to it. Nov/Dec '97, p. 16.

That's Entertainment. Should foundation funds be used for entertaining? Nov/Dec '97, p. 38.

To Pay, or Not to Pay? Sometimes family foundations must deal with the dynamics that accompany having family and nonfamily trustees. What happens when the idea of trustee compensation is introduced to the equation? Three real-life foundation executives explain how they would broach this potentially volatile topic. Mar/Apr '98, p. 52.

Who's Being Served? Three foundation executives discuss not jeopardising the foundation's charitable status by confusing publicity for the foundation and direct corporate publicity. May/June '00, p. 42.

Website Resources

Accountability resources from the Council on Foundations

<http://www.cof.org/accountability/accountability.htm>

National Committee for Responsive Philanthropy

<http://www.ncrp.org/>

One of the NCRP's missions is to make philanthropy more open and accountable to all. The site includes publications and information on current projects.

A Selection of New Titles in the Resource Centre

The Unseen Revolution: Ethical Investment in Australia

The State Chamber of Commerce (NSW), Nov 2001

'The Unseen Revolution' explores the growing popularity of ethical investment funds and what this development means for Australian businesses. It includes a description of the ethical fund screening and indexing processes, profiles of five major Australian ethical funds and provides a step-by-step guide on how to become a sustainable company.

Social Enterprise in Australia: An Introductory Handbook

Adelaide Central Mission, March 2002

This publication is a first attempt at providing a detailed guide and resource kit for social entrepreneurs. It explores the idea of social enterprise in a contemporary context and provides an explanation of the legal and organisational mechanisms which can form the basis of social enterprise activities.

Effective Philanthropy Report 2001

Corporate Good Works, Jan 2002

Nonprofit Governance: Steering Your Organisation with Authority and Accountability

Berit M. Lakey

National Center for Nonprofit Boards, July 2000

Disaster Grantmaking: A Practical Guide for Foundations and Corporations

A report of a Joint Working Group of the European Foundation Centre and the Council on Foundations. November 2001

An Accord Between the Government of Canada and the Voluntary Sector

December 2001

Home and Abroad



Home conferences

Australian Health Promotion Association 14th Annual Conference – 'Made in the Future'

A conference on leadership, capacity building, evidence and advocacy.

When: 16-19 June, 2002

Where: Sydney Convention and Exhibition Centre, Darling Harbour

General Enquiries: Conference Secretariat

PO Box 65

Annandale, NSW 2038

Phone: (02) 9280 0577

Fax: (02) 9280 0533

Website: <http://www.healthpromotion.org.au/>

Email: healthpromotion2002@pharmaevents.com.au

Nonprofit Governance and Management Centre 'Building Better Boards'

A dialogue on non-profit governance.

When: 13-14 July, 2002

Where: Sydney, NSW

General Enquiries: Non-Profit Governance and Management Centre

PO Box 246, Gladesville NSW 2111

Phone: (02) 9879 6674

Website: <http://www.governance.com.au>

Abroad conferences

Foundations for Europe: Science and the Citizen European Foundation Centre Annual General Assembly and Conference

When: June 3-5, 2002

Where: Brussels, Belgium

Enquiries: European Foundation Centre

51, rue de la Concorde

B-1050 Brussels, Belgium

Phone: 0011-32-2-512-8938

Fax: 0015-32-2-512-3265

Email: efc@efc.be

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

Council on Foundations Corporate Community Involvement Conference

When: July 28-30, 2002

Where: Seattle, WA, USA

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

Phone: 0011-1-202-466-6512

Fax: 0015-1-202-785-3926

Email: confinfo@cof.org

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

Finding Out More

Order forms for the **Australian Directory of Philanthropy** and **Philanthropy Australia's Corporate Directory** can be downloaded from www.philanthropy.org.au Telephone: (03) 9620 0200 Fax: (03) 9620 0199.

If you wish to contact or find out more about the organisations, people and projects mentioned in this edition of *'Australian Philanthropy'*, here are some links.

WINGSForum 2002 (pages 4-9)

For transcripts of speeches, program and workshops reports of the conference, visit the WINGS website at www.wingsweb.org/

Reprinted newsprint articles:

'New way of giving for a new world,' by Elizabeth Cham
The Australian, 11 March 2002.

'Big spenders spend a little time in Sydney,'
by Valerie Lawson
Sydney Morning Herald, 11 March 2002

'Charity burgeons at home,' by Vanessa Walker
The Australian, 12 March 2002

'Charities gain when companies learn how to give,'
by Catherine Fox
The Australian Financial Review, 13 March 2002

'Philanthropist gives 'tax cheat' notion the boot,'
by Catherine Fox
The Australian Financial Review, 19 March 2002

Media summary

Mark Colvin reported on the WINGS conference on ABC's PM program, including interviews with Lillian Holt (Centre for Indigenous Education, University of Melbourne) and Darren Godwell (Lumbu Indigenous Community Foundation) on 11 March 2002.
www.abc.org.au/pm

Geraldine Doogue interviewed James A. Joseph on Life Matters, ABC Radio National on 12 March 2002.
www.abc.nat.au/rn

Tracey Grimshaw and Steve Liebmann interviewed Elizabeth Cham and Ambassador James A. Joseph on the Today program, Channel 9 (Melbourne) on 12 March 2002

For the full text of Ambassador Joseph's address to the WINGS conference, go to the Philanthropy Australia website at www.philanthropy.org.au

News and Views (pages 10-14)

Telstra Foundation – For applications forms, full guidelines and eligibility criteria for both the Telstra Community Development Fund and Telstra's Kids Fund, go to www.telstrafoundation.com
Telephone: 1800 208 378
Fax: 1800 123 836

Tax Agenda Moves Forward – Comparative report on tax environments available online at www.philanthropy.org.au

Yorta Yorta High Court Appeal Update – Peter Seidel is the Special Counsel Public Interest Law at Arnold Bloch Leibler Lawyers and Advisers. Web address is www.abl.com.au

Telephone: (03) 9229 9999
Postal address: GPO Box 5071Y,
Melbourne Victoria 3001

Affinity Groups can be contacted through Philanthropy Australia.

Community Foundation News (page 15)

The Foundation for Rural and Regional Renewal has a website at www.frrr.org.au/

Freecall across Australia: 1800 170 020

Enquiries: info@frrr.org.au

Postal address: Dudley House, PO Box 41,
Bendigo, Victoria 3552.

Feature: Aspiring to Greater Transparency (pages 16-21)

Are Codes of Practice Cool?

The European Foundation Centre website is at www.efc.be

The Council on Foundations (USA) website is at www.cof.org

The Association of Charitable Foundations (UK) website is at www.acf.org.uk

'Letter from Minnesota: Rules to Give by' by Michael O'Keefe is published in Foundation News and Commentary, Council on Foundations, Nov/Dec 1997 Vol 38, No. 6).

The William Buckland Foundation Annual Report is available from Philanthropy Australia. Ring (03) 9620 0200 for a copy.

Civil Society Forum (page 22)

Islamic Council of Victoria can be contacted on (03) 9328 2067.

Liberty Victoria can be contacted on (03) 9670 6422.

Philanthropy in Action (page 23)

The Myer Foundation website is at www.myerfoundation.org.au

All the ruMAD? material is available to read, download or print from www.rumad.org.au
Telephone Justine Negus or John Davidson at the Education Foundation on (03) 9650 4277.

Member File (page 26)

The Geoffrey Gardiner Dairy Foundation's closing date for preliminary applications is Friday 21 June 2002.
Website at www.gardinerfoundation.com.au/

Email Carol Bate, CEO: cbate@gardinerfoundation.com.au
Telephone: (03) 9606 1900.

Philanthropy Australia – Members

New Members

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

Full Members

Mr Andrew Angelatos
CAF Australia
Geoffrey Gardiner Dairy Foundation
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