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How the West has Won

Passionate Philanthropy

Partnerships in Practice

When Isolation = Innovation



PHILANTHROPY
Australia

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From the President

Philanthropy Australia is strongly committed to highlighting and developing philanthropy throughout the nation. We are pleased to confirm that philanthropy is indeed alive and well in all corners of Australia, and to prove our point, we have dedicated this edition to philanthropy – including innovative grant making and community development - in Western Australia.

Just as Australia as a whole is considered remote and large in size but small in population compared to the rest of the world, Western Australia is seen as a remote Australian state, geographically large, but small in population compared to the rest of the continent. Just as Australia's unique circumstances have required us to work co-operatively and respond to need where we find it, so such circumstances have given the Western Australian community even more impetus to work together.

We offer our readers stories with the recurring theme of working together, of people creating practical solutions to philanthropic challenges, of partnerships and projects that have grown from simple beginnings where people have simply rolled up their sleeves and tried to make a difference.

This edition was created by a committee of Western Australians along with representatives

of Philanthropy Australia and the researchers/writers for this project, Sally Edwards and Mary Henry of the Curiosity Company. The lovely design has been provided by Nicola Farquarson of DesignPod Graphics and we are especially grateful to the team at Advance Press for their generous support enabling this special edition to be brought to you in colour.

The editorial committee had the difficult task of choosing what to include in this issue, and they were spoiled for choice. In the end they have included a fascinating variety of stories about philanthropy in WA. Many of the projects and people featured in this issue are having a national impact, such as Professor Fiona Stanley, Martin Copley, Michael Chaney, and Ernst and Young's Perth office. Some, like the remarkable cases of Foodbank and the Headquarters project, are locally-focussed yet will resonate with many people working on their own local projects elsewhere. Others, like the story of the WA Community Foundation, offer a valuable insight into how WA is approaching the challenge of adapting lessons learnt elsewhere to its own unique circumstances. Needless to say there were many stories we were unable to include including the wonderfully innovative philanthropy work being done by organisations such as the Scoop publishing group, Modal Consulting

and Adventure Club. We hope to bring these stories to you in later editions.

This edition, written, designed and printed in Western Australia, has been made possible with the financial and practical support of Lotterywest. Philanthropy Australia sincerely thanks Lotterywest for its foresight and participation in this project as an active grantmaker. We have also been greatly honoured by the support of the Governor of Western Australia, His Excellency Lt John Sanderson AO, himself a thoughtful philanthropic leader.

We hope the following stories will inspire existing and potential philanthropists in Western Australia to make contact with like minded people in their state. We hope we also inspire new ideas and maybe new partnerships between people in different parts of our expansive land. Finally, we hope we inspire philanthropists in other parts of the nation to come forward with their stories, as these marvellous Western Australians have done.

LADY SOUTHEY



From the National Director

I have recently returned from a trip to North America and Europe on behalf of Philanthropy Australia.

The thing that most struck me about the philanthropic sector in the United States is the amount of energy being consumed by scandals. Such scandals involve the spending of foundation monies on purposes other than making a difference to the communities they are meant to be serving.

Sadly, this is happening in a country where accountability and reporting standards have been elevated to an art form. Codes of practice, detailed and glossy annual reports, and expensive evaluations haven't seemed to have helped. The questions for us in Australia are clearly 'how does this happen?' and 'how do we avoid it?'

We need to realise that accountability is not just about filling in forms and complying with the letter of codes of practice or similar requirements. It's about looking at the impact of grants and the impact of philanthropy on the community. It's about ensuring that our boards and committees retain diversity and close connections to the communities we purport to serve. We should be addressing these fundamental questions, not assuming that publishing an annual report is the beginning and end of true accountability.

In Canada, there has been a lot of good research conducted around the role and operations of NGO's. Processes such as contracting out of former government-provided services and competitive tendering

have depleted the resources and energies of the not-for-profit sector. Canadian foundations are beginning to recognise that they need to support organisations' infrastructure and provide for core costs, if the not-for-profit sector is to survive in any effective way. This significant debate is surely overdue in Australia.

In the United Kingdom, they are reaching the culmination of a long process of redefining and reorganising charities. At the time I departed, there was a Bill before the House of Commons, including a new definition of charity and a requirement that organisations prove that they provide a public benefit in order to retain or obtain their charitable status. This may lead to some interesting scenarios, including some of the nation's most elite schools having to justify their contribution to the public benefit! This and a number of other changes proposed in the Bill will have an impact on a similar debate already taking place in Australia.

A positive outcome of my travels has been that many wonderful and inspiring practitioners in the international world of philanthropy have agreed to come as guest speakers to our Australian conference. This will give us all the opportunity to learn from their experience, engage in dialogue and share our own experiences with each other. With the benefit of such a rich discussion, we hopefully won't have to muddle through 20 years of bad practice before learning the lessons that others have been forced to learn.

An interesting development amongst

some of the larger foundations both in North America and in Europe is the growing emphasis on the role of investment monies. In the next step beyond ethical but 'passive' investment, some of these investors are using the power of their proxies to change company behaviour. Foundations such as Rockefeller, Ford and Van Leer are talking about 'unlocking the power of the proxy', or as they have called it, 'boosting philanthropic missions'.

Philanthropy Australia plans to facilitate this and many other debates locally over the next few months, together with a range of leading Australian foundations who are keen to promote discussion amongst their peers and push forward the frontiers of philanthropic theory and practice in Australia.

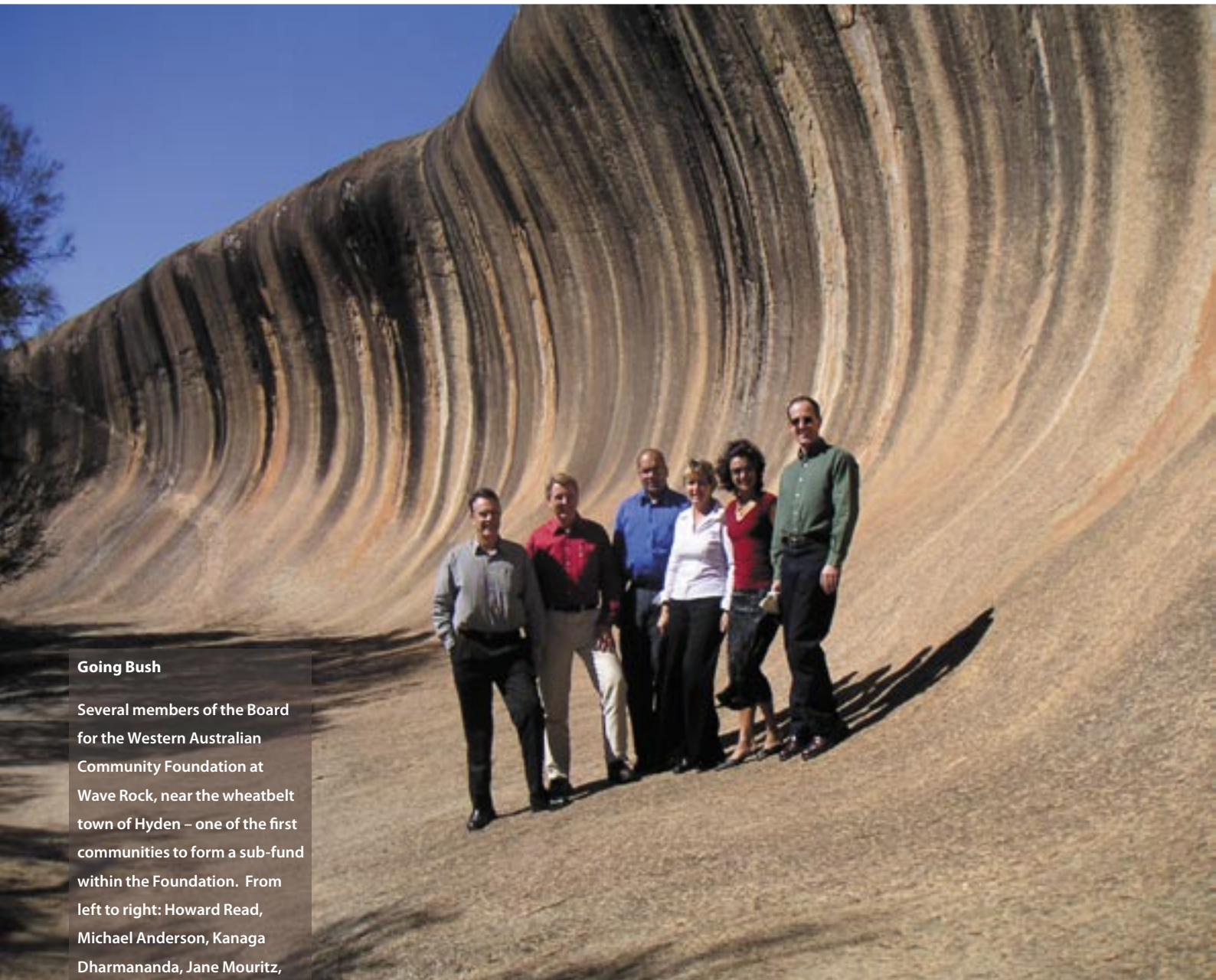
Generally, there has been an increase in philanthropy across the world. As impressive as this increase is, it does not match the huge growth in almost all western economies. Australia has been part of this trend, with a total of 224 new Private Prescribed Funds having been established to the end of the 2003/4 financial year.

Of these new funds, an impressive 16% are located in Western Australia. We are delighted to provide a brief insight into the flowering of philanthropy in the west, and we look forward to profiling other creative giving communities throughout the country in future editions.

Elizabeth Cham
ELIZABETH CHAM

A Community Foundation For Our Largest State

When it came to getting the concept of a community foundation up and running in Western Australia, the unique circumstances of this vast state with its differing communities required some seriously fresh thinking. The new Western Australian Community Foundation is now on track to make their model available to everyone.



Going Bush

Several members of the Board for the Western Australian Community Foundation at Wave Rock, near the wheatbelt town of Hyden – one of the first communities to form a sub-fund within the Foundation. From left to right: Howard Read, Michael Anderson, Kanaga Dharmananda, Jane Mouritz, Kathryn Sydney-Smith (CEO) and Frank Cooper (Chair).

With the Governor of Western Australia, His Excellency Lt Gen. John Sanderson AC, behind the idea from the beginning, setting up a Western Australian Community Foundation may have seemed like a straightforward proposition. It was anything but. Once the people involved started looking at how other community foundations worked it soon became very clear that WA would need its own version. With a small, highly dispersed population (only 10% of the nation's people spread over more than 30% of its land area) number crunching soon made it very clear that the vast majority of WA communities could not afford to establish and sustain their own foundation. Instead what was needed was a new kind of shared model – one which did not just enable communities to share the costs of foundation administration but where they could actually increase their benefits, too. This set a new direction that led to the launch of the Western Australian Community Foundation in June 2004.

CEO Kathryn Sydney-Smith emphasizes that worldwide, community foundations have always had a strong tradition of being tailored to suit the region and culture of the people involved. For WA, she says this means the board takes a very practical, business-like approach based on a clear view that WACF is not a charity and is definitely not out to compete with existing charities for funds. Kathryn says that WACF is about taking a very long term approach to providing communities with resources to choose their own future. "We are about giving people a way to invest in the long term future of their community. This doesn't replace short-term fund raising for charitable programs – rather it works to complement the giving that funds many important projects."

WACF Board member and member of the Prime Minister's Community Business partnership, Tony Howarth AO, agrees. He says the vision is for WACF to play a facilitative role helping communities create their own solutions, tailored to their own situation. He also says that one of the greatest strengths of the community foundation model is the scope it offers for everyone to be a great philanthropist because even small donations are important for building an endowment fund as a long-term investment.

In the WACF model, the foundation offers a core service of enabling communities to establish sub-funds. So far this includes geographic communities like the tiny-but-dynamic wheatbelt town of Hyden (home of the famous Wave Rock), as well as community sector organisations (such as the award-winning Botanic Parks and Gardens Authority's Friends of Kings Park group). Both the Governor and the Chair of the board Frank Cooper take every opportunity to remind people that a 'community' can come in all shapes and sizes. WACF is keen to help each of them create their own permanent fund so that each new project does not have to start fund-raising from scratch. The communities will be able to access fund-raising and project planning support through WACF and community advisory groups will work closely with WACF trustees to ensure community funds are always

spent to meet emerging community needs. Projects in education, health care, social services, the arts, economic development and environmental protection will all be part of the mix.

Another major focus for the foundation itself will be to encourage people to consider donating to their community (or communities). Bequests are expected to be a major growth area – as are business-community partnerships. Donors can then make contributions towards to a particular sub-fund, or a related group of sub-funds (eg aged care). They will also have the option to donate to the foundation in general in which the funds are shared over all sub-funds. The foundation structure allows both tax-deductible and non-tax deductible sub-funds, both with the same goal of creating a permanent, income-generating endowment.

The WACF model aims to be self-sufficient but in the meantime it has itself received philanthropic support to get things moving in these early years. So far WACF has received donations from several major benefactors including the Department of Local Government and Regional Development, the Myer Foundation, Alcoa, St John of God Health Care and Rio Tinto.

For His Excellency Lt Gen. John Sanderson AC, now WACF Patron, this is shaping up as one of the proudest legacies of his time as Governor of Western Australia. In fact, for him, the concept of a legacy is central to engaging people with WACF in particular, as well as philanthropy in general. "The things that really engage people, that resonate in human culture are the things that endure. We take neither time nor money with us when we die so the best we can do is choose how to spend them while we're here. Everyone leaves a legacy," he says. "The important thing for each of us is to choose what ours will be. I hope the WA Community Foundation will help people do just that."

Projects in education, health care,
social services, the arts, economic
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protection will all be part of the mix.



“Everyone leaves a legacy. The important thing for each of us is to choose what ours will be.”

His Excellency, Lt General John Sanderson,
Governor of Western Australia.

A Big-Picture Governor

Governor of Western Australia, His Excellency Lt Gen. John Sanderson AC is a longtime advocate for philanthropy and was a driving force behind the establishment of the Western Australian Community Foundation. He is now the foundation’s official patron and one of its proudest champions.

“One of the greatest privileges of being Governor is that you get to meet so many different people all over the state doing fantastic things, often entirely off their own initiative – particularly in small country towns.” he says, adding, “In my view, the most meaningful change happens at the grass roots. Community is where it happens.”

One of the things that still puzzles Governor Sanderson about his home state is that Western Australians are good at coming up with solutions to problems and making them happen but they seem reluctant to promote their own achievements or even those of others in their community. “For example, we have very low rates of people nominating themselves or each other for awards and other

recognition programs. I’d like to see that change.” he says.

Governor Sanderson also has very clear views on what constitutes good philanthropy – for him it’s all about thinking over long time periods and valuing the potential of everyone. He says, “Charity is important but focused on short-term needs whereas philanthropy should be about investing in long-term opportunities - not just giving someone a handout today but helping make their own contribution.” It’s a view that places strong emphasis on empowering people and sharing responsibility, including with elected representatives and large corporations. He is happy to say much progress has been made on that front and attitudes have come a long way since the get-rich attitudes during Western Australia’s 1960s resources boom. “People in WA have made a lot of money off the land and its resources - things which were not really theirs to start with so I think it’s only right to give back.”

Beyond the Comfort Zone

We can all benefit from a regular dose of reality – that’s the message from the WA branch of professional services firm Ernst & Young. They started the 21st century by taking a very different approach to their community involvement - an approach now starting to be adopted by the firm nationally. Managing partner Michael Minosora says that, for his team, the rewards of philanthropy are all about the importance of ‘recalibration’...

Professional services firms come in all shapes and sizes but at the ‘big end of town’ are the well-known international names currently referred to as the “big 4”. Ernst and Young is one of those 4 and, like their counterparts, they are a prestigious employer attracting extremely high-achieving staff. Managing Partner of their Perth operations, Michael Minosora, says that a few years ago the practice’s leadership started to realise that life tended to come fairly easily to their employees. Most staff members had come from comfortably-off families, had done well at school, followed this up by doing well at university and then gone on to high-status, well paid careers working on big-budget projects for government or the more lucrative end of the private sector. Although very hard-working, the practice seemed to be running the risk of having a narrow culture dominated by young professionals who had a somewhat limited view of the world and their privileged place in it. Ernst and Young in Perth were already involved in a corporate giving program at that stage but this new direction in thinking led to recognition that the real opportunities for the firm to benefit from giving would lie in a much higher level of participation. That was five years ago and they have never looked back.

They had to feel their way at the beginning - developing a self-generated model of how a firm like Ernst and Young could broaden their community engagement. Minosora says it was clear early on that this was not going to be about doing more pro bono work for not for profit clients. If what they wanted was to develop more rounded individuals and more balanced, rounded company culture, they were going to need to get outside the comfort zone of their normal work practice.

The first steps included implementing a policy of matching voluntary work hour for hour and to begin partnerships with well-known charities like the Starlight Children’s Foundation. Before long they embarked on a learning relationship with United Way, inviting them in to educate management and staff alike about what was happening in the community sector and what help was needed. Then they took a novel step – a team of staff ‘champions’, who had volunteered to lead the project internally, invited a shortlist of charities to take over the company boardroom – so that all employees could talk to people working at the frontline of community need. From that initiative has come two significant outcomes: firstly an increase in participation in the volunteer time matching program and secondly a new salary deductions program

in which staff choose where their salary donations go and the firm matches them dollar for dollar. The salary deductions program already has 30% of Perth staff signed on. Minosora says “It may not be cheap but we are delighted with the outcome.”

Since then, the community participation approach has become more entrenched in the office culture and is driven by a team of champions representing all the company’s divisions. Their latest success story is the Homework project that began in 2003 in partnership with St Vincent de Paul. Homework engages Ernst and Young volunteers in regular one-to-one tutor-mentor roles with underprivileged and at risk children in the Belmont area. The Homework roster now has nearly 40 Ernst and Young staff volunteering regularly in the crucial after-school timeslot and has even expanded to include several of their clients who have been inspired to join in. Minosora says the experience is invaluable, that everyone involved comes back not only feeling good about the contribution they make but seeing their own lives differently. This is what he means when he says the real value of this approach to corporate philanthropy lies not in an improved reputation or a nice warm a fuzzy feeling. These are secondary to what he calls the ‘recalibration’ value – the scope offered by participative, not passive, philanthropy to change people’s perspective on the world and their role in it.

Consultancy work generally requires people to be pragmatists, and Minosora says they were never under any delusion that this new road would be hard – much more complicated and time-consuming than just donating funds. The old adage that ‘time is money’ applies more to the professional services industry than any other, not just in terms of billable hours but more subtly in terms of the need to always being able to respond to clients’ needs. This means that for a firm like Ernst and Young to attempt to establish a genuine staff involvement program was brave indeed. The fact that the program has since expanded and continues to thrive today is, Minosora says, testament to the value they receive from it. Success is infectious. Nationally and internationally Ernst and Young have long been behind projects like the Entrepreneur of the Year awards, which now include recognition for social entrepreneurship. But in May this year, that national partnership group also decided to embark on a more participative model for Ernst & Young’s corporate philanthropy. The Perth team are proud to have had some influence, but are too busy with their work – and their Homework – to dwell on it for long.



A Man and His Mission

Sometimes philanthropy is about giving financially and sometimes it is about giving of yourself. Sometimes it is about both. English businessman Martin Copley has dedicated himself - funds, heart & mind - to protecting as much of Australia's unique wildlife as he can. His effectiveness-based approach has achieved outstanding results and offers much relevance to philanthropic projects of all kinds. Now the unique organisation that has emerged from his efforts, the Australian Wildlife Conservancy, is starting to have a national impact. It is a prospect that brings with it deep pride, great excitement and new, complex challenges.

In the late 1980s, a highly successful English-born businessman felt that he wanted to shift his emphasis not necessarily away from making money but definitely towards making a contribution. He felt that he could, and should do more than business. Long-standing family ties to Australia meant he was already a regular visitor here, particularly to Western Australia and he already felt a strong connection to the wilderness. Then, during a 1989 visit to South Australia's Warrawong Sanctuary he became aware of the dire circumstances of much of Australia's wildlife, including its native marsupials. Learning of the prospect of a "Marsupial Ghost Town" changed everything. The man's name was Martin Copley and since then, he has devoted much of his life and large amounts of his personal funds to ensuring the future of Australia's wildlife.

At first, Martin's vision was simply to establish "a wildlife sanctuary of scientific integrity" in south west Western Australia. He imagined it would be easy to create and had little idea where this initial inspiration would lead. So, in the early 1990s his first wildlife sanctuary, Karakamia was established on 200-hectares of diverse bushland in the Darling Range, east of Perth. This led to involvement in wildlife reintroduction and conservation programs through partnerships with other organisations such as the state's Department of Conservation and Land Management (CALM). By then, the vision had started to take on a life of its own, and Martin, now inspired by the success of The Nature Conservancy in the US, began to develop the Australian Wildlife Conservancy (AWC).

AWC's business model is based on buying high conservation-value land and actively managing it for wildlife. But it goes beyond this with highly focused programs on individual animal species. AWC works closely with partners, particularly on understanding and reducing threatening processes in the landscape. They are also very active in community education including the sometimes challenging task of working with surrounding landowners. For Martin, this is all about doing things properly. He worries that some philanthropic ventures look for quick, feel-good outcomes, running the risk of missing the causes of a situation and the chance to make lasting change. "We have a very strong emphasis on always asking what is going to be most effective?" he says. "It's not easy but in the long run it is the only way that will work."

This is a challenge... familiar to many of the nation's ... change agents: how do you find a balance between staying committed to your passion and not letting your involvement stand in its way?

This model, and Martin's personal funding support, meant that, by 2001, AWC had five sanctuaries and strong conservation credibility, with clear scientific evidence about the sanctuaries' effectiveness. "With conservation, one apparently good result does not mean a job well done. With a breeding program in the wild, for example, you have to be several generations in before you can consider it a success. And even then, you should still be in it for the long haul. Conservation is a long term gig if you want to do it right."

By this stage, AWC and the limelight-shy Martin were generating plenty of interest. It was time to take the concept to the national level but this required support from other funders. Martin had to embark on whole new phase in AWC's history – fund raising. He remembers being very shy and reticent at first about asking others for money, "but the response has been so positive that I am much more comfortable with it now. Even if people can't give, they are genuinely interested in our approach."

AWC has now attracted a base of more than 4000 regular donors. Their support, along with several government grants, have enabled its expansion to 13 sanctuaries nationally covering more than 655,000 hectares. This is not a large area in Australian terms but AWC's approach is based on having a smaller amount of high conservation value land and then making the most of it with scientific and education initiatives and partnerships. One interesting phenomenon is that people are often happier to sell their land to AWC than to sell it to Government agencies.

Martin knows that the potential of AWC to protect Australia's unique fauna is only just beginning to be realised. But he also knows that to achieve that potential, it must outgrow him as founder. Were he to become synonymous with AWC – a perception of ownership could be a weakness. Martin is not looking for an 'out' – quite the opposite, he sees himself committed to this project for life. But, equally, he does

not want AWC to miss out on opportunities because people see it is 'his baby'. This is a challenge which will be familiar to many of the nation's most committed and visionary change agents: how do you find a balance between staying committed to your passion and not letting your involvement stand in its way?

Over time, Martin has realised that this personal mission is a form of philanthropy – a word he would never have used at the beginning. He has now taken steps to learn from other philanthropic efforts, such as succession planning and working to build the vision into the future of both his family's estate and their family traditions with a Prescribed Private Fund.

His experience with AWC has convinced Martin of the importance of philanthropy – environmental or otherwise. He acknowledges that philanthropy is not democratic – it is one person or one group taking action they think is important. But, while he sees the role of democratic governments as crucial, he argues that "we can't just rely on government – they are limited in what they can do, how quickly, how effectively and at what cost." He believes concepts like AWC have to emerge from private citizens. "Individuals should work with government as much as possible, but they must be prepared to do things themselves."

Martin is keen to see new approaches tried. Rather than see these as competition to AWC, his view is definitely "The more the merrier. Some ideas may not work in the long run but others might and we can all benefit from the lessons of both." His advice to others with a desire to contribute is to look for where the niche that makes a difference might be but to also look for where their passion lies. The AWC journey has taught him that, to really make a difference, takes enough passion to move through the setbacks, ask the tough questions and motivate a long term commitment. With the achievements of AWC so far, he should know.





Leading By Example

Wesfarmers' Michael Chaney is the golden boy of both charities and shareholders alike. Soon-to-be chair of the National Australia Bank, Chaney says it's no coincidence that over the past decade Wesfarmers has been both one of WA's most generous corporate philanthropists and one of its best performing companies.

Having led local company Wesfarmers to unprecedented business success, delivering shareholders with both outstanding dividends and share value Michael Chaney is probably WA's most respected business leader. Now playing an increasing role on the national stage (with seats on the boards of BHP Billiton and, soon, the National Australia Bank), Chaney is an outspoken advocate of corporate philanthropy.

"The view is sometimes expressed that public companies should not "give away shareholders' money" through philanthropy. That is based on a fairly common misconception; namely that the directors' primary duty is to the shareholders. In fact it is well established by statute and common law that directors owe their primary duty to the company itself. If the directors believe that by engaging publicly in philanthropic activities the company will further its interests (for example, by enhancing its reputation and the public's support of it) they have every right to follow that path."

All this from a company whose mission statement does not say anything other than its purpose is 'to provide a satisfactory return to shareholders'. Chaney has spoken and written frequently on this

point, most recently in *The Age*, in July 2004, where he concluded that "if it's adding to shareholder value and its enriching the community, there can be no convincing argument against business philanthropy".

Separate businesses within Wesfarmers Ltd, such as Wesfarmers Federated Insurance and the Bunnings chain of hardware stores, have their own philanthropy programs over and above the program of the parent company itself. As a corporation, Wesfarmers has a very clear philanthropy program and has now taken the step of allocating a predetermined amount of pre-tax profit – which currently works out to upwards of \$2.6 million per annum. Chaney says this takes out the initial questions about whether to give and how much – leaving just the, much harder, question of "To whom?". For Wesfarmers the answer has been to be flexible but to look for a statewide application, generally in one of six categories: rural (eg farming scholarships), arts organisations (eg the Perth Festival, the WA Ballet and the Blackwood River Chamber Festival), indigenous advancement (eg Clontarf Football Academy), medical (eg the Speech and Hearing Centre and the Institute for Child Health

Whether giving as part of a corporate philanthropy program or as a private citizen, Michael Chaney says the giver is rewarded as much as the recipient.

"I think the satisfaction of knowing you are helping someone is significant. Of course self satisfaction should never be the reason you give – but it's a very good side effect that often gets forgotten."



you can so that others are encouraged to contribute and so that its not always the same people shouldering a disproportionate amount of the burden.

Like many Australians involved in philanthropy, Chaney cites the American example as leading the way. He is worried about trends in the level of civic participation and also about fatigue among frequent givers who are constantly being approached for large donations. He would like to see things broadened to include more people and to giving more time as well as more money. He holds out much hope for programs such as ongoing salary deductions which may individually involve small contributions but which collectively can be very significant and can involve so many more people in philanthropy.

Chaney himself credits his parents with bringing up seven children while maintaining a very strong sense of civic responsibility. He cites well-known businessman Kerry Stokes, also originally from WA, as a standout example of a modern philanthropist. But he says his real heroes in this respect are his father, brothers and sisters, for their tireless efforts and contributions of time in public services and on behalf of people less fortunate than themselves.

Chaney started his personal involvement with philanthropy with a fundraising project on behalf of Perth independent school, John XXIII College. He soon also became involved in capital fundraising projects for the Art Gallery of Western Australia and to establish Scitech Discovery Centre. Since then he has been involved in 8 or 9 major capital fund raising campaigns and personally contributed to many others. He says it actually gets harder as you go along, to keep going back asking people to give to another cause but that if you believe the cause is important and that you can make a difference then there is nothing to do except just step up to the task. He understands why some private philanthropists remain anonymous and occasionally does so himself, but overall feels that its better to be open if

Now more of a major national business figure than ever before (he will soon retire as CEO of Wesfarmers and become chair of the National Australia Bank board), Chaney says that, like Australia on the world stage, WA has always 'punched above its weight' – in politics, business and other ways. His view is that WA has had to be a bit exceptional in its 'get on with it' approach to philanthropy. "It sounds terribly parochial," he says, "but it is true. Even the humble community quiz night fund raiser has always been more of a feature in WA society than the rest of the nation." If he continues to advocate for active, thoughtful corporate philanthropy at a national level, the rest of the Australian philanthropic community will no doubt forgive a little parochial moment now and again.

Research), education (eg universities and Scitech Discovery Centre) and community groups (eg the Royal Flying Doctors Service, Duke of Edinburgh Award program and the Australian War Memorial). They have won several awards for their contributions, particularly for their commitment to the arts.

Wesfarmers has for many years now been the darling of WA's booming business community, beloved of shareholders for its consistently high returns and soaring share value. Chaney and other Wesfarmers leaders, such as Richard Goyder, Trevor Eastwood and the late Harry Perkins, see a clear link between this result and the fact that are a leader in local philanthropy. "It's hard to prove," Chaney admits. "Short term returns might be higher if we did not engage in philanthropy but we believe that long term they would actually be lower."

Giving gets in your blood

Founder of Western Australia's remarkable Telethon and longtime philanthropy advocate Sir James Cruthers has lead a fascinating life at the forefront of philanthropy in the West.

“Once you get the bug, you're stuck with it” smiles Sir James Cruthers as he reflects on a long life at the frontline of philanthropy in Western Australia. “The giving gets in your blood. Giving and assisting – contributing however you can, and not just money.” After being involved in giving and fundraising since 1948, it is little wonder that there is hardly an aspect of WA philanthropy that the softly-spoken Sir James doesn't know about.

How he ended up in philanthropy is a story worth telling. As in many families of meagre means in the early 20th century, the young James Cruthers left school at 14. He got a job with the *Daily News* newspaper but World War II soon intervened. Despite being underage, James joined the Air Force and had a successful career as a pilot (although he had been too young to drive at home). After the war, he returned to the *Daily News* as a clerk and decided he wanted to be a journalist. The editor at the time was the charismatic and opinionated James Edward Macartney who himself had been made editor of the *Daily News* at only 23, after being expelled from the University of Western Australia for controversial writing. Macartney refused to try him out as a journalist unless he had achieved his Leaving English certificate by the end of the year – only three months away. By Christmas, James had not only passed English, but also Economics and History. This must have impressed Macartney, who later hired James for The West Australian newspaper. This relationship would later prove fateful not only the young Sir James, but in fact for the whole state. But more of that later.

Opinions are shaped as much by our experiences as by anything else. Sir James has a very strong opinion that the media can and should play a much larger role in modern philanthropy. It's an opinion based on his experiences with the WA media throughout his professional career (he went on to be Chairman of The Sunday Times). “The media used to be very community-focused,” he says. “Not only in terms of giving publicity to good causes, but actually getting involved in fundraising – in generating grass-roots giving. Corporate philanthropy is good in WA but if you want more people to give, you need to involve the media.” He remembers his first direct involvement in philanthropy and fundraising was the First Annual Red Cross March Appeal in 1948. By this stage he was a journalist at the *Daily News* and he was assigned to cover the appeal. Before long he found himself very involved, looking for ways to help raise more money. He was hooked. In 1949 he played a key role when *The West Australian* newspaper, embarked on a fundraising drive to buy WA a new linear accelerator machine to treat cancer patients. As well as providing publicity about the project and making a financial contribution itself, The West published a daily list of donations.

This was so effective that £20 million was raised within a month. For Sir James, this project is still a powerful symbol both of the culture within Western Australia and also of the power of the media and how it can be used to bring a community together. After that experience, he pioneered many media fundraising programs. One particular memory he is fond of is a campaign to raise funds for a new Playhouse theatre for Perth. The Weekend Mail newspaper ran a “Find the Football” competition where a picture from the local football competition was published with the ball removed. Readers were invited to enter a competition by marking in where the ball had been – but the price of entry was sixpence. “Hardly anyone remembers that the Playhouse Theatre (in Pier St in Perth's CBD) was built with sixpences,” he says.

“...if you want more people to give,
you have to involve the media.”

Sir James Cruthers

Back to the fateful relationship with Macartney. While in charge of WA Newspapers, Macartney decided to apply for the state's first ever television licence. He gave the job of leading the new station to James with a clear direction that it was to be a community-focused television station. In 1968, with the station well established, James led the team of visionary people who started Telethon – Western Australia's first television appeal. Some of their inspiration undoubtedly came from the success of other media fundraising efforts, but Sir James says there was a grander vision, too. “The idea was for there to be just a couple of days each year where the whole community came together to think about and support those of us who were less fortunate.”

Telethon has always placed a big emphasis on children – not just on fundraising for those who were sick or who had disabilities, but also on involving children in the fundraising process itself. “Kids have always loved Telethon,” says Sir James. “This was always one of the aims; to show kids a culture of giving to and helping others. Encouraging them to be good citizens.” The response was overwhelming and Telethon was soon a familiar and beloved tradition, achieving the world's best per capita donation rates for any fundraising event. Community projects ‘to raise funds for Telethon’ started cropping up and themselves became traditions. Today, Western Australia's Telethon is still going strong and has so far raised more than \$65 million for many WA charities, including the world-leading Telethon Institute for Child Health Research. The day when James Cruthers impressed James Macartney was a good day for WA indeed.



Sir James Cruthers and 2004 Telethon Child, Tayla Divitini, getting to know each other shortly before this year's Telethon. The 24-hour appeal run by TVW Channel 7 raised more than \$2.8 million this year - the best result ever.

A New Way To Child Health

Australian of the Year for 2003, Professor Fiona Stanley, has led a life more influenced by philanthropy than most of us. In fact she is the first to say that her life's work, the Telethon Institute for Child Health Research, simply would not exist without either small or large-scale philanthropy. Now, the institute she helped establish is breaking new ground with a new approach to thinking about child and community health. This approach is having a remarkable national and international impact.

Good science is all about asking the right questions, and according to Professor Fiona Stanley, the future we have tomorrow will depend on the questions we ask today. For her, this is as much an issue for how we practice good philanthropy as it is a challenge for government and the community as a whole to ask brave questions about how we prevent social problems developing in the first place.

Fiona is Director of the Telethon Institute for Child Health Research in Perth. She is also one of the nation's best known scientists and most respected leaders, especially after she spent 2003 as Australian of the Year. She helped found 'the Institute' more than 12 years ago, with a vision for a world-class research program focusing on the complex network of factors determining child health. From the beginning, the Institute's own success has been underwritten by its ability to attract philanthropic support of all kinds and sizes. Fiona and many of her fellow founders were scientists already being supported by grants from Perth's extraordinarily successful television appeals, particularly Telethon, hosted each year by Channel 7. Realising they had to have more than a dream to sell, they set up the Institute in a building leased for \$1 a year and invited potential funders to visit and find out about their grand vision in the making.

Fiona says that once people understand the driving idea behind the Institute, they are very supportive. "WA is a very warm and generous community," she says, citing many things she thinks have made the state that way. "The isolation is part of it – the community has had to learn to take care of its own. And WA's size means things are familiar and relevant. When we set up the Institute many of the people involved already had 20 years of relationships with organisations like Telethon – and the public knew us. That's enormously important. Pride is also a factor – people here like to think that we can still have world-class things in WA. There may not be 'old money' the way there is in other states but there is still a sense of the pioneering spirit, a can-do vibrancy and creativity in everything from our research to our arts and literature and our business ventures. And finally, we are also a prosperous state which has done well financially and people are

aware of what a great place this is to live."

As for philanthropy and fund-raising, Fiona is both profoundly grateful for the opportunities it has created for her and her colleagues and outspoken about future directions. "Without philanthropy we would not have got off the ground," she says simply. "And we would have gone down the gurgler on many occasions since. We have now been able to go to government and prove the economic value of what we are doing and argue for government support proportional to our success at getting research grants. But it is still very vulnerable to political changes and we would never have been in a position to get it at all without people supporting us philanthropically to start with. This should not have been the case. There should be government funding for research infrastructure. My goal now is to ensure that the Institute has a foundation – and funds that can support it over the long term."

Two other 'p' words Fiona feels strongly about are pathways and prevention – and she'd like to see philanthropic efforts concentrate more on both. She is very concerned about trends in child health, saying that "some of the data we are seeing would scare the pants off people." And, citing research that clearly links growing social inequality to worsening health outcomes on everything from birth weight and asthma to educational performance and teenage depression, "We have never had such wealth – or such disparity in wealth". In this context, she is especially concerned that society's approach tends to be to try to 'fix' a problem at the end with a simplistic 'solution'. It is always easy to say we should focus more on prevention than cure. Fiona's argument is more sophisticated than that. Whether the issue is child health or not, she is a passionate advocate for society moving away from looking for simple fixes to instead asking brave questions. Questions about how complex a problem situation is or what are the drivers in creating that situation and how the pathways work – either negatively or positively. She argues that governments should be the frontline for this but she is hopeful that philanthropy can play a role, too, as our community finds out how to reinforce helpful pathways and avoid destructive ones.



For Fiona herself, "I just feel really privileged to have had the kind of opportunities I've had. I really understand now I'm never really going to be a great scientist but what I can do is create an environment where other people can do good science. A place where our top researchers like Steve Zubrick, Carol Bower and our asthma team, with Pat Holt, Peter Sly, Wayne Thomas and all their research crew, can become world leaders. Now that wouldn't have happened to the extent that it has without the Institute. I haven't done all of the detailed science, I've just created an environment where other people could blossom and do their work. So that's where I feel I get some positive feedback about having done these things.

Giving in the West Achieves a Long Reach

WA has plenty to be proud of. The Telethon Institute for Child Health Research is starting to deliver significant benefits for the whole of Australia and even have an impact on thinking about child health in the rest of the world. Not a bad outcome for a dream that was made possible by WA philanthropy including gifts from public appeals such as the remarkable local Telethon through to ongoing support from Lotterywest and significant donations from corporations such as Wesfarmers and private benefactors such as the Perron Trust.

What Makes it Unique?

What makes this institute unique is this clear focus on multidisciplinary research as an important path to understanding the factors that create negative health outcomes for children and families, and therefore for society as a whole. It's an approach that asks questions in three main themes:

- Causal pathways and how genetic factors interact with environmental factors
- The burden of disease and ill-health in populations and how it can best be measured.
- The science of prevention.

These three question themes are then used to drive and link the work in each of the major research programs including their work on asthma, birth defects, indigenous health, infectious diseases and cancer.

It's a concept and an approach that Fiona is completely passionate about. This stands her in good stead when she has to undertake fundraising (generally 30% of her very long working week) – something she is particularly effective at. The "Fiona-factor" is a compelling talent for communicating the vision of the Institute – she simply puts it down to having "the gift of the gab".

Philanthropy Puts the Pieces Together

Fiona remembers that a number of years ago they actually invited some of Australia's leading scientists to Perth to subject the Institute to a rather confronting exercise in self-evaluation. "We asked them to review our credentials and our work and tell us if we were mad trying to set up something of this quality and ambition here in Perth," she says. "They put us all under the microscope and said to us "Go for it"." So they did – with gusto. These days most of the actual research itself is generally funded by winning research grants and contracts – at which the Institute now does remarkably well including an impressive number of international successes. Now their most urgent ongoing funding need is to supply the infrastructure that research grants don't cover. And for an organisation as focused on being multidisciplinary as this one, infrastructure couldn't be more crucial. "This is what our heroes support," she says. "They are the philanthropists, community, corporate or private, who come to us and say "What do you need? How Can We Help?" We tell them we can find ways to pay for the science but we need help to keep the lights on, we need help to pay the bills and we need resources to help us put the pieces of knowledge together so we can actually solve problems in child health for the future."

A Capital Approach

What do you do with a very big idea? You share it, that's what. WA's Association for the Blind are in the final stages of their outstandingly successful capital fund raising campaign for state-of-the-art new facilities near the CBD. It gained the support of many of WA's movers and shakers. All the donors cite it as one of the best projects they've been involved in – so why did it work so well...?

In Western Australia there are currently around 25 000 people in Western Australia living with blindness. The Association for the Blind's current facilities and resources are already overstretched and unable to cope with demand. But even more worrying is the trend which indicates that over the next 12 years the number of blind Western Australians will balloon by 57% to 39 000 people. It's a daunting prospect but one which has galvanised many members of WA's small philanthropic community. It brought them together in a remarkable capital fund raising campaign so that the Association can build \$14.2 million state-of-the-art new facilities to cope with the future needs of people who are blind. Construction starts after Christmas 2004 and the people involved couldn't be prouder to have been involved.

The Association's CEO Dr Margaret Crowley had never been involved in a capital fundraising campaign before and she says she learnt a great deal from the process. Two of the most effective secrets to their success, she says, was firstly the clarity and value of their 'big vision' for the Association and secondly the calibre of people who led the campaign.

The grand plan was always ambitious – this was not just a project to expand a few of their facilities to try to keep up with demand. "We see ourselves as a public benefit organisation," says Margaret. "But we feel a strong obligation to be very strategic about how we provide those benefits. Our culture is very much to questions things constantly, especially how we are delivering services." Many leaders of community service organisations would agree with Margaret



"Most critical is to have a real and urgent need and a real passion to do it - a real sense that you can do it. The other key is to get people to help you. They need to feel confident that you can pull it off."

Margaret Crowley, CEO
Association for the Blind

when she says that "As an organisation, the more successful we are, the broker we get." So the concept she and her team took on their fundraising journey was nothing less than to build a world-class centre of excellence for supporting people who are blind or vision impaired. A facility that would include scope for recreation, Braille skills development, rehabilitation, counselling, technology education, sensory development, medical support, social services and ongoing research – all for clients of any age. "We are doing this not because we need new buildings," says Margaret. "But because we need to offer our services to our clients in a different way – for better quality-of-life outcomes for our clients."

The campaign leadership group evolved quite organically over the early phase of fundraising. The very private philanthropist Stan Perron AM was very supportive from the outset. He became



campaign President and invited John Poynton to take on the high-profile role of campaign Chair. Many other well-respected WA business and community leaders also took on roles, including the Hon. Chief Justice David Malcolm, AC CitWA, as campaign Patron. John credits much of the project's success at attracting a strong group to lead the fundraising to Stan's support as well as to the calibre of Margaret herself – and her ability to communicate the vision and engage directly with people. He says "The campaign really gathered momentum as it went along and the group dynamic worked very well with both men and women playing lead roles."

Another key aspect of their success was deciding up front to be politically bipartisan. "Dr Geoff Gallop (WA's current Labour Premier) has been a wonderful supporter and encouraged us to seek support from all sectors of the community.

Before long, federal Liberal MP, the Hon. Julie Bishop was involved and WA's State Liberal Party President, Danielle Blain, was Chair of the Major Gifts Committee. Crowley says Blain "has been fantastic." The bipartisan approach worked so well that in Blain's office there is even a framed photograph of Gallop congratulating her on her success in the role of Chair of the Major Gifts Committee.

The campaign is still underway but it has raised enough funds to embark on construction. The project was given a major boost from a Lotterywest grant of \$6 million to the Association in May 2004. The grant is the single largest donation in Lotterywest's 71-year history. Among the other major gifts, the Government of Western Australia has committed a further \$2 million (for the Library and Resource centre), Dr Haruhisa Handa has donated \$1.5 million (for a sports academy and recreation centre), the Stan Perron Charitable Trust has committed \$500,000, as has Wesfarmers (for a new community education theatre) and Woodside (for the Guide Dog Discovery Centre). There have also been many smaller donations which have contributed substantially to turning this particular dream into reality. Margaret says "I think people are enormously generous. We have found that people really want to be part of their community. That's something I have had to learn: people care about each other and are prepared to contribute and to help – it's important to stop and take time to ask them.

Perth Businessman, John Poynton, is chair of the Association for the Blind's Capital Fundraising campaign. Driven by a strong sense of good fortune at living in Western Australia, he has been involved in philanthropy for 15 years. For John, philanthropy is "a wonderful leveller, a constructive way of dealing with the status surrounding money and of moving towards a more secure and empathetic society." He may feel strongly about the importance of philanthropy and hold hopes that the next generation of businesspeople will be there to pass things on to, but he says it is "Important not to be sanctimonious about it."

John is also passionate in his belief that people should always be upfront about their fundraising efforts and not try to hide them within veiled invitations to events like cocktail parties. Although WA does perform well on many philanthropic efforts, John feels it is still limited by the small size of the WA economy, and the lack of 'old money' compared to other states. He would like to see philanthropy broadened to include more people in WA "rather than the same small group being asked to give over and over again" and hopes more debate and discussion can help achieve this.

Dr Haruhisa Handa (seated centre above) is fast becoming a legendary figure in WA. This Japanese-based multi-talented businessman, (he is also an accomplished artist and author), has forged strong connections to WA as a second home. A committed philanthropist, Dr Handa has in recent years been a particularly generous supporter of many WA arts and charitable organisations. He has donated \$1.5million to the Association for the Blind to enable it to build a new sports and recreation centre as part of the new complex.



The happy team behind the Association for the Blind's fundraising success.

"We get so busy with the doing, we don't promote the outcomes enough...and don't take time to celebrate like we should. Midland Brick realised this and has started to help us celebrate and promote the successful outcomes of the partnership."

Hills Community Support Group CEO, Helen Dullard, pictured with Midland Brick General Manager, Peter Hogan.



Helping Hands

If anyone had told the Helen Dullard of twenty years ago that she was going to start a community support project on a budget of just \$250 and build it into a thriving, award-winning organisation with a budget of \$6 million and staff of 330, she would have thought they didn't know her at all.

That just wasn't what I was about or where I thought I was going," Helen remembers. But she's also a great believer in fate and timing and today is now CEO of Hills Community Support Group (HCSG) based in the hills Shire of Mundaring, about 40 minutes east of Perth. The journey to be one of the state's most respected not-for-profit CEOs still takes the softly-spoken Helen by surprise. She has, quite literally, made it her job to care about people in need and that has led to an extraordinary career. It has also resulted in a broad based organisation making a difference to thousands of lives and now operating as a model of its kind, recently winning awards and accolades for business partnering.

Hills Community Support Group began on a wet, cold night in 1983 when more than ninety people gathered together at a community centre in the outer Perth suburb of Swan View to discuss the support services needed by people in the area. They decided to form a support

group to help provide volunteers. Armed with donations from the local shire council (a phone, a desk and \$250 in funds) and group members (office supplies), they were soon up and running, with Helen as Office Coordinator. Early support came from the Department of Community Services (\$3,000) and Lotterywest (funds for a bus and wheelchair), as well as both the local Rotary and Lions clubs. By 1986 HCSG was coordinating the efforts of more than 160 community support volunteers together doing more than 3,000 voluntary jobs a year with barely enough funding to reimburse their petrol money. But the vision was in place and their networks and credibility were growing. Invitations and opportunities to expand into other community support services started to come HCSG's way – they have never looked back.

Now HCSG has seven funding programs providing a diverse range of services for people coping with disadvantage, disabilities, frailty, age and mental health problems. Programs such as the Gesundheit program

which offers in-home aged care; Milperra, the renovated former school which HCSG now runs as a respite and supported care facility; The Open Options programs for aged people with a disability, the Get Away Club for active seniors or the Post School Options program for young people with a disability. HCSG now has 13 Manager positions and 36 vehicles in its fleet. From Office Coordinator all those years ago, Helen now spends her time juggling the responsibilities of policies, procedures, risk management, staff training and organisational development.

"Most of our peers receive funding from just one source. Our funding cuts across three levels of government with seven sources of funding. There is hardly a government agency we don't receive funding from, and it is recurrent funding " says Helen. "But philanthropy is crucial. We managed to raise more than \$600,000 over budget last year – that takes a lot of work to achieve but it makes a huge difference. It pays for things that may seem like bits and bobs but really are important." Applauding corporations which donate a certain percentage of funds each year, Helen has been actively lobbying State Government to build a social dividend percentage into their tendering processes to encourage businesses to find ways to engage with community needs.

Power Partnering

The partnership between Hills Community Support Group and Midland Brick has become well recognised as an outstanding example of community-business partnering. They were finalists in the Department of Community Development's Community industry awards, winner in the Disability Services Commission's "Making a Difference" awards, winner of the local Chamber of Commerce's Youth Employment award, winner and state winner/national finalist in the Prime Minister's 2002 Community Business Partnerships Awards. Here's Helen Dullard's perspective on the partnership and how it started.

"I think just giving money is valueless," says Helen Dullard. "It's an easy way out - to contribute with no responsibilities or engagement - no knowledge. It's too easy. I think we have to move on – any partnerships now are about everybody winning – everybody getting touched." That approach was forefront in her mind when she approached large local construction manufacturer, Midland Brick (part of the Boral group), a few years ago.

"It struck me as a good match, they are based in our area, the youth component of our programs is strong, and joblessness is a key issue around here. I had been put in touch with the General Manager but warned that he was very blunt and that I would need to have my act together. When we finally did meet, he had four other people in the room and had clearly taken it seriously. He said "this is a good item for us" and that gave me courage. So I went in with a list of things that I thought were the rules of the game: most important to me was that we both had to win out of it or there was no point in going ahead. I also said, "I see a partnership as about walking down a path together." I admitted I didn't have any idea how to do it. "All I can say is we work in the area of frail aged, disabilities and youth – that's the smorgasbord you could choose from if you did walk the path. You could choose one or do all three."

"If this partnership is going to be real I don't want to be relegated to the receptionist. I'm a CEO and I want to be talking to an equivalent decision maker. We're quite a unique not for profit organisation, we have a big footprint in this area just like you do. I know that many of your staff live in the area and touch the same surfaces of the community that we do." I also knew we had youth and unemployment. I knew they had a severe shortage in the trades – people weren't going into the trades, brickworks – they were battling. I knew that he was new into the company – he was full on – lots of staff had left.


When the General Manager and two other people from Midland Brick came to visit us in our office - a transportable building in Mundaring - I remember feeling sick and thinking "What have I done? What can we possibly talk to him about?" I couldn't think how it would work. But I also believe in fate and timing. We were just beginning to draw plans for a respite centre. He saw these in our office and that was it. He was soon saying "We could provide the bricks at cost and Boral has roofing materials you could have". He was off and away. We talked about Work for the Dole and other programs and everyone got excited. They had two neglected houses and offered to give us access to them. That was five years ago. Now they have also given us a five-year tenancy for a school they just bought. They also bought a special kiln and helped us set up a joint venture fundraising project making decorative bricks.

We put young people at risk on site with Midland Brick and it's our job to support them. We get them there with a breakfast, we help them learn how to manage their anger, sustain a job, and be respectful. We have to teach them when you start/knock off and how things work. Things like how to understand and interpret rules, even things like phone use. Knowing how to handle yourself when jokes get made or when people are having a go at you. When people are not being nosy but genuinely care about you. Learning to tell the difference. All that stuff which these kids haven't learnt but need if they are to have a chance at long term employment. Then the community gets the bonus.

I take my hat off to the new General Manager. It can be hard to understand the young people we are working with – how they have fallen through the gaps in our community and how they are facing serious social barriers. Many of them cannot read. The General Manager thoroughly supports our aims but it is the Midland Brick employees who are the backbone of the partnership. It is them who make it happen – they are the manifestation of the partnership. Together we are working with these young people – proving that given a second chance, they have a lot of personal strengths to build on."

"I see a partnership as about walking down a path together...we work in the area of frail aged, disabilities and youth – that's the smorgasbord you could choose from if you did walk the path..."

Helen Dullard, CEO, Hills Community Support Group.

A photograph of two women walking along a wooden walkway at King's Park in Perth. The woman on the left is wearing a dark jacket and a blue scarf, and the woman on the right is wearing a bright pink jacket. They are both smiling and looking towards the camera. The walkway is made of wooden planks and has a metal railing. In the background, there are lush green trees and a view of the city and water.

What a View!

Lotterywest's Director of Grants and Community Development, Jacquie Thomson (left), and Chief Executive Officer, Jan Stewart (right) taking a walk along the Lotterywest Federation Walkway at Perth's spectacular King's Park.

How the West has Won

Western Australia's state lottery, Lotterywest, is unique in Australia. Evolving from its beginnings as a way to raise funds for WA's destitute during in the Depression, Lotterywest operates as a highly successful commercial enterprise, run within the public sector and is also the state's largest philanthropic organisation, returning over \$150 million last year to a wide range of beneficiaries.

Several times each week, millions of Australians hope their numbers will come up in one of the national weekly lottery draws. Lotteries are big business around the world, including in Australia. But in Western Australia, the profits don't go into government consolidated revenue or to a large private corporation – they go straight back to the community via a unique organisation known as Lotterywest.

Lotterywest is the trading name of the Lotteries Commission of Western Australia. A State Government entity enshrined in legislation dating back to 1932, Lotterywest operates under all the same rules as any other public sector agency – except that it is also an entirely self-funding business - now with a half-billion dollar annual turnover. Lotterywest has always operated very much as a commercial business and it has also always had a very clear purpose – to generate funds for the benefit of the Western Australian community.

With WA accounting for 18% of the nation's lottery sales and the highest per capita sales nationally (with only 10% of the population) Lotterywest is clearly doing something right. Chief Executive Officer Jan Stewart credits her staff of nearly 160 people for much of the performance, along with Lotterywest's retailer network. "We have over 500 retailers throughout WA representing our business and our success is very much a partnership with each of them," she says, "It's a very diverse group, almost all are small businesses operating in their local community. We work hard at communicating well with them and ensuring positive business arrangements. For example, we pay one of the highest rates of commission in the nation and continually work with our consultative panel of retailers in developing our business strategies. This is very much a reflection of how Lotterywest thrives – working with all stakeholders in everyone's interests.

Director of Grants and Community Development, Jacquie Thomson, says that members of the lottery industry and community sector from other states or countries have often told her how lucky Western Australia is to have their lottery system set up this way. “We know it is unique,” she says. “The Lotterywest model is such an important asset and opportunity for Western Australia. That inspires all of us to constantly do better – so that we are making the most of what is an enormous privilege.”

The inspiration certainly seems to be working. More than 80% of the adult population of Western Australia play one of Lotterywest’s games each year, winning \$282 million in prizes in 2003/4. On the granting side, Lotterywest has achieved the quite extraordinary customer satisfaction rating of 97% from all grants applicants. Combine this with the fact that since 1992 alone, in excess of a staggering \$518 million has been distributed through the Lotterywest grants programme to more than 10,000 community organisations and another \$1.569 billion has gone to the State’s Health Services and to Arts and Sports groups. You would have to work hard indeed to find any member of the West Australian community whose life has not been touched by Lotterywest.

There are many advantages to the Lotterywest model but perhaps the two benefits that receive the least attention are the most important. The first is Lotterywest’s capacity to be directly and immediately responsive to the community. This is profoundly empowering for building social capital and encouraging people to participate actively in how they would like Western Australia to be. Whether it’s a \$1,000 contribution towards equipment for a learning centre, a \$5,000 contribution towards a bushland regeneration project or writing a community history, through to grants of \$1,000,000 or more for major new community facilities, community members with big ideas for worthwhile projects always have a great place to start.

But money is not all Lotterywest has to offer. Which brings us to the second unsung benefit of the Lotterywest model - what Jacquie Thomson calls “our connectedness”. By virtue of being simultaneously a business, a public sector agency and the state’s largest source of discretionary grants to the community, Lotterywest’s unique network of relationships with businesses of all sizes, state and local government agencies and throughout the community sector puts it in a unique position. It’s difficult to find another organisation as connected throughout the life of the state as Lotterywest. A key role for Lotterywest’s future development lies in working to turn this to maximum advantage for Western Australia by finding ways to offer this connectedness to others so they can better fulfil their hopes for their communities.

“...it would be difficult indeed to find any member of the West Australian community whose life has not been touched by Lotterywest.”

Jacquie Thomson

A Matter of Principles

Most philanthropic organisations have funding principles that guide what they do. Here are Lotterywest’s:

Being Responsive

Lotterywest’s role is to respond to the community. This means responding to submissions. For most grant applications, submissions can be made at any time throughout the year but, for particularly popular grant areas, Lotterywest holds annual grant rounds.

Being Developmental

Rather than just acting as “gatekeeper”, the community grants team within Lotterywest takes a developmental approach, working with applicants even before the submission is prepared to help make each project as effective as possible - even if the original proposal is not considered ‘fundable’. Rather than a mechanistic way of doing things, Lotterywest actively encourages their grant coordinators to invest as much of their time as possible on this more developmental approach. This often involves working collaboratively with applicants to help form partnerships with other groups and funding sources to make the best use of available resources and maximise the benefit to the community.

Balancing Needs

In keeping faith with its beginnings, Lotterywest’s first priority is always to meet the needs of organisations working to support socially and economically disadvantaged people. But, coming a close second as a priority, there is also the need to celebrate and enhance the overall quality-of-life in Western Australia. The granting policy aims to balance these.

Being Flexible

It’s a quandary familiar to many granting organisations: sometimes a proposal comes along that does not sit specifically within a pre-determined grant area or meets current guidelines but still offers considerable community benefit. What to do? Rather than be overly rigid and risk a valuable opportunity for the community being lost, Lotterywest’s procedures have been designed to be flexible when a situation arises. There are often times when overall budget variations are put to the Board if community need justifies doing so.

Complementing, Not Owning

As part of its overall strategy of strengthening the community sector in Western Australia, Lotterywest is rarely a sole funder of any project. It aims to work with organisations to help them ensure they have accessed all appropriate funding sources and linked with all appropriate stakeholders to give their proposal the best chance of success. This also means ensuring that every project is truly owned by its community.

Decisions, Decisions

As anyone involved in philanthropy knows only too well, deciding how to allocate a finite pool of resources is a perennial challenge. For Lotterywest, many of the fundamentals underlying their approach to decision-making came from the late 1980s and the beginnings of its relationship with Philanthropy Australia. Now CEO, Jan Stewart was then appointed to lead the grants division and she soon embarked on a remarkable learning curve which included heading East where Philanthropy Australia put her in touch with the nation's leading thinkers and practitioners in philanthropy. More than a decade on, Jan still credits those experiences as major influences on the direction taken by Lotterywest. "It's still an organic process and granting policy should always be seen as a 'work in progress,'" she says, adding that the current Director of Grants and Community Development, Jacquie Thomson, and her team have "taken that direction to the next level. Each year they find ways to improve things, shaping as they go."

Jacquie says the granting framework has five main focus areas, each designed to be broad and inclusive:

- 1. Extending Capacity in Not For Profit Organisations**
Includes conferences, scholarships and organisational development.
- 2. Strengthening Community Service Delivery**
Includes service organisations working with particular target groups, especially those people disadvantaged in some way.
- 3. Enhancing Community Development Initiatives**
Includes social research, community projects and community enterprise.
- 4. Valuing our State's Heritage**
Includes conservation and interpretation of cultural and natural heritage.
- 5. Advancing Participation in Community Life**
Includes community facilities, events and celebrations, special State-wide initiatives as well as cultural and recreational programs.

A Legacy of Hard Times

Lotterywest began controversially when WA was struggling through the Depression years and there was little money around to pay for desperately-needed hospitals and poverty relief. Lotteries were illegal at the time and so, when it was proposed that a state lottery be created as a way of raising emergency funds, there was much debate about the moral and social implications. For some, the concept offered a way to control illegal gambling while others were worried about government condoning and even encouraging what they saw as immoral practices. It took 3 years for the proposal to become a bill and make it through parliament – and then only by a narrow margin. Little did they know the enormous impact that particular vote would have. The state lottery for Western Australia eventually began operation in 1933. Within a few years its success was clear. By 1936 the lottery was able to distribute £60,000 – a princely sum for the time.

By 1954, the Lotteries Commission had distributed around £4,000,000 throughout WA and was considered 'part of the permanent life of the State'. In parliament it was said that the contribution made by the Commission to various charitable organisations had reached proportions 'where it would be calamitous if there were not such a source of funds'. Despite this, the Lotteries Commission for many years still had to seek annual parliamentary approval just to keep operating. This was eventually solved when the Lotteries Commission was established as a permanent Statutory Authority by an Act of Parliament on 31 August 1954.

The Act has been amended several times since then. The latest, in 1998, determined that allocation of funds should be calculated using a percentage of "net subscriptions" (which simply means total sales, minus retailer commission and prizes). 40% of net subscriptions are automatically allocated to the State's Health Services, 5% each to the Department of Sport and Recreation and Culture and the Arts, up to 5% to the film industry and the Perth International Arts Festival and at least 12.5% in direct grants to the community. In fact, by keeping operating costs at around only 7%, Lotterywest is consistently able to provide much more than the required level of direct grants.

The Act also states that only not for profit organisations and local Government agencies are eligible for community funding grants for purposes described in the Act as "benevolent and charitable" – a phrase which can be interpreted very broadly. Advice on how best to allocate those grants is developed on behalf of the Board by Lotterywest staff. Grants are then recommended by the Board to the Minister for Racing and Gaming, who has the right of veto but not of direction.

The Magic Numbers

Here are some highlights from 2003/2004:

- \$505 million worth of tickets sold
- Players won \$282 million in prizes
- Retailers made approximately \$38 million in commissions
- Over \$152 million was given in beneficiary returns:
 - State Health Services - \$76.2 million
 - Department of Art and Culture - \$9.5 million distributed to more than 25 different art organisations
 - Department of Sport and Recreation - \$9.5 million distributed to more than 120 different sporting groups including the WA Institute of Sport
 - \$57.2 million was given in direct grants to 1509 different community organisations, including \$4 million to the Perth International Arts Festival and \$4 million to Screenwest for the WA film industry.





Make it Personal

Ask WA's philanthropists who their heroes are and nearly everyone includes Stan Perron. This enormously successful self-made businessman is a walking definition of the word 'unassuming', inspiring great loyalty in all who work for or with him. He aims for personal donations of around \$1 million a year yet still would never call himself a philanthropist.

Stan Perron is one of Western Australia's leading businessmen and philanthropists and has made an indelible mark on the state's progress. But few know his name and even fewer would recognise him in a crowd. Today, his strong property and mining empire, highly successful Toyota dealership (one of only three in the world not owned by Toyota itself) and his extensive, long-standing philanthropic work mean that Perron has everything required to lead a very high-profile life indeed. But nothing could be further from his mind. Instead, he simply gets on with things, quietly avoiding attention or fuss.

He describes his business empire with its remarkably loyal staff as "pretty well running itself". Perron has enormous trust in his small team of direct employees which includes around 30 people who have been with him more than 20 years and some who have been with him more than 30. His faith in them is so great that Perron spends long periods away on holiday without calling, only goes in to the office 3 days a week when in town and has never felt the need for a mobile phone or email.

Perron admits to always having had a tendency towards giving to charity and a particular soft spot for children in need. Not one to bother with powerbroking or 'networking', he has been a member of the same Rotary Club, in the working class Perth area of Belmont, since he helped found it in 1960. At 82, he still goes to the weekly lunch meetings, enjoying "just a sandwich with each other". He also still does his turn on the roster at the weekly Sunday Swap Meets which involves joining fellow Rotarians in the car park of the local shopping centre (which he happens to own) at the crack of dawn to collect the entry fees from stallholders.

More than a quarter of a century ago he set up the Stan Perron Charitable Trust as part of the estate planning for his company and family. The trust runs very much along Perron's personal tendencies towards respecting financial basics, keeping things simple and "keeping something back for the future". With three voluntary directors and all professional services provided on an honorary basis, the trust invests funds in property and equities to provide the capital base for future grants. It also distributes grants from its own income twice a year, focusing on helping seriously ill children and people with disabilities as well as supporting research and health promotion around cancer and heart disease. The trust is designed to continue giving long after Perron himself is no longer at the helm. "I've planned for this to keep on going forever."

There is no promotion of the trust or its donations and no grand plan other than to keep giving. Perron says simply "It's just a personal thing". He also does not consider the \$1 million he gives personally each year as a big deal and would never presume to call himself a philanthropist. From Perron's point of view, it is easy for him to give money as he is fortunate enough to have it. He is quick to point out that others are even more generous, including people like his wife Jean who dedicate much of their lives to volunteer work. Although not big on giving advice, he would like to see more people giving back to their community in general. In particular, he would dearly love to see more young people becoming involved with service clubs like Rotary. "It's hard to get young members these days but the fellowship you get is wonderful and they give so much to the community – it is very important," he says.

There are many people working from all sides of philanthropy in Australia who will smile in agreement with Perron when he says "I'd much rather give money than have to ask for it."

Woodside's World

If they lead, we will follow. Energy company Woodside's thinking on corporate philanthropy rates employee involvement as a huge priority. And they've been getting a huge response...

Walk through Woodside's brand-new building at the west end of Perth's CBD with Sandra Jamieson and you can discover a lot about people. "He works with the Asthma Foundation ... she helps out at Lighthouse ... those two over there both work with the Royal Flying Doctor's Service." Sandra is Woodside's Corporate Citizenship Advisor and it's actually part of her role to know a lot about what her colleagues do after work and at weekends. These days, many large companies are coming to view opportunities for employee involvement as a key part of their approach to corporate citizenship but Woodside has taken this more seriously than most.

Their commitment to employee involvement began under previous CEO, John Akehurst and has been in place for several years now. The emphasis on employee involvement is driven as much by a view of the company as fully integrated in the communities in which it operates as by a desire to ensure that working for Woodside is both a point of pride, and a source of satisfaction.

No mere tokenism, engagement with employees is actually seen as a driving force behind the decisions of how much money is given to what cause. Sandra points out that Woodside uses a broad list of target areas and criteria when allocating corporate donations (more than \$3 million last year) but the interest from staff to get involved, and scope for them to do so meaningfully, is seen as crucial.

Employees are encouraged to come to the company with ideas of causes to support. "We want to do more than just give money," says Sandra. "We want to contribute and have it be a positive experience for everyone involved. You never know what is going to emerge when you approach things that way. When we were developing our funding agreement with the Royal Flying Doctors Service we asked, "As well as the money, what else could we do to help you? What can we do that would really be useful?" That really seemed to take them by surprise at first but now we have employees helping in several ways, including our technical staff helping them with airstrip surveys."

Far from being a distraction and a drain on productivity, Woodside has found the staff response extremely positive. It contributes to morale directly but just as importantly it contributes to the corporate culture indirectly – employees engage with each other differently and communicate outside of silos. It sets Woodside apart as an employer of choice but more profoundly it helps build the social capital of the company itself. For example, working in the energy industry means that Woodside has many ex-patriate employees and overall, many employees do a fair bit of travelling. Sandra points out that this gives

an extra level of value to the employee engagement approach. "It really helps ex-pats connect with their new community quickly and helps people who are away a lot feel less out of place when they are home." Woodside even has employee volunteer initiatives under way overseas, including their employees in East Timor and Libya.

There are many little signs indicating how much Woodside staff have engagement with the concept of corporate citizenship. In front of Sandra's desk is a big box of tiny shampoo bottles and other hotel giveaways. As employees travel they bring these back for the young people at the Passages youth drop-in centre. The staff decided a few years ago not to send corporate Christmas cards but to use electronic message instead and ask that the money saved (more than \$10,000) be donated to Foodbank to help provide Christmas fare for disadvantaged people. That was on top of the special Christmas salary deductions done annually (\$12,000 last year).

Woodside has now been nominated, shortlisted and awarded many accolades for their approach. Some particularly recent highlights include:

A specially-commissioned Certificate of Appreciation in WA's 2004 Disability Services Awards for the contribution by a large number of company employees to various disabilities support groups during the year.

Winning the hotly contested Outstanding Long-term Partnership Award with the Western Australian Youth Orchestra in WA's Arts Sponsorship Awards. Woodside has worked with WAYO since 1991.

Twice being shortlisted for the Australian Business Arts Foundation Bytecraft Innovation Award. They won in 2001 for their work with the BlackSwan Theatre Company and in 2002 were highly commended for their partnership with the Awesome Children's Festival. It is no coincidence that the judges comments described the partnership as being innovative, creative and unusual, noting that Woodside's involvement actually "leads to cultural change within the business."

But there is no time for patting themselves on the back. Woodside's 2200 employees worldwide have a highly successful company to run - and build. And when they are not doing that, there is all manner of other jobs to be done...There are the regular staff sleep-outs and fundraisers, backyard blitzes and kids camps to be organised. Then there is the new program with Volunteering WA that will offer Woodside staff the opportunity to take part in more than 100 community projects over the next 12 months. It sounds like Sandra is going to be very busy, indeed.

Partnerships in Practice

Youth Focus CEO, Jenny Allen, with Woodside's Allan Palmer. Several members of Woodside's staff, including a former CEO, have played key hands-on roles in Youth Focus' recent success.



From Rescue To Relationships



Jenny Allen couldn't have been handed the reins at a tougher time. Only a few months into her new job as CEO of the suicide prevention charity Youth Focus, the state Government changed and funding was cut across the board. Overnight, Youth Focus lost \$150,000 of income – representing more than half their annual budget. At the time, they had 70 young people in their suicide prevention program and Allen was left thinking "What am I going to do? I can't just say 'Sorry, Goodbye' ". The way forward lay in a newly invigorated approach to corporate philanthropy and now, just 3 years later, Youth Focus is stronger than ever.

Very determined and highly skilled with years spent overseas and 3 grown children, Allen soon realised that to survive, Youth Focus would have to do much better at working with the philanthropic sector. After several people referred her to the energy company, Woodside, because of their newly emerging focus on youth issues, she began the journey away from impending disaster by knocking on their door. The connection worked well from the outset – a great example of how important it is for organisations to be well matched. The match is far more than just matching a youth-focused charity with a corporate that has chosen youth issues as their 'cause'. Both Woodside and Youth Focus were looking to build resilient long term relationships that could evolve into other forms of engagement – such as with employees and external stakeholders. The connection was so strong that, in addition to their ongoing funding projects, former CEO of Woodside and committed advocate of corporate citizenship, John Akehurst, remains on the Youth Focus board and current Woodside staff continue to play other key roles in Youth Focus in many ways. It has also developed into a network of other relationships, both

informal and formal, with other Woodside partners such as the Institute for Child Health Research and the Ministerial Council on Suicide Prevention.

Youth Focus is a community-based organization providing support for young people showing early signs associated with suicide and deliberate self-harm. It has gone from a budget of \$265,000 and 4 staff when Allen took over 4 years ago to a budget of \$1.5 million, with \$650,000 in kind donations and 15 staff. Corporate philanthropy now accounts for more than 90% of operating revenue each year – government funding is 7%.

Their latest fundraising ball had the 'A' list of Perth movers and shakers in attendance with other ball committees wanting to know just what they are doing to attract such a impressive turn out.

Allen is a big believer in focusing your efforts – either as a community-organisation or a philanthropist. "You make much more of a difference if you focus, rather than scatter your resources around." As CEO, Allen herself spends about 65% of her time on fundraising. But she also says that in her experience, small businesses are often proportionately more generous than big business. She cites more than \$80,000 worth of recently donated work to the new Youth Focus buildings as an example of how much support is out there if you form good relationships, saying "...to survive in the not-for-profit sector you have to have a strong network."

For Allen, the real credit goes to her team. "I could raise all the money in the world, but without the team you don't survive. Teenagers are not easy to deal with and burn out is very real in this sector. Yes, I do work hard on fundraising but the team works even harder on delivering the services."

The Fogarty's Find Their Path

Like many thoughtful philanthropists, the Fogartys look for projects with 'ripple potential'...

Annie Fogarty has run the full gamut of emotions along the path to establishing her family's philanthropic project, The Fogarty Foundation. From being overwhelmed by the range and extent of problems needing help to amazed at the wonderful efforts being made to solve them, from inspiration to sadness, frustration to pride. This journey began when she and her husband, businessman Brett Fogarty, starting thinking about how fortunate their own children were. Driven by a community-minded family ethic, they decided to get serious about 'giving back'. Starting from scratch, Annie learnt as much as she could about what was needed, where and by whom. "I was blown away by both the scale of some of the social problems but also by the creativity and commitment of people working to improve things," she remembers. "I was also struck by how generous the community sector is. Everyone gave so freely of their time and expertise and were so quick to put me in touch with others. There is no real network for philanthropy in WA yet but the people out there are so willing to help each other – it is a huge untapped resource."

"Everyone gave so freely of their time and expertise ... it is a huge untapped resource."

The Fogartys realised they had a particular passion for empowering people through knowledge and ideas so they decided that their foundation would focus on "Encouraging endeavours in excellence through education, the community and in life." Among their early initiatives, the Fogarty Foundation starting providing scholarships in education at the University of Western Australia and funding programs for Clontarf Football Academy which reaches young Indigenous men through sport and then provides education in regular curricula, employment preparation and life skills. The foundation also has ongoing relationships with The Smith Family and Mission Australia and supports a Youth Studies program with regional organisation Avon Youth Services. But perhaps the Foundation's two most ambitious projects to date have been the Youth Leadership program developed with the Local Drug Action Groups (LDAGs) network and the Education with Learning Difficulties program developed with Edith Cowan University.

The Youth Leadership Program was the Fogarty Foundation's first big project. A social worker friend had put Annie in touch with the

Local Drug Action Group network. The eighty or so 'L-DAGs', as they are known, are a grass-roots phenomena, each developed under their own steam rather than being created by a government entity. It soon became clear that there was a lack of effective efforts in preventing drug and alcohol problems among young people. An initial program concept to involve sports people as role models soon evolved into a model to empower young people to make a lasting difference in their own communities. The Youth Leadership program now regularly funds a two day, leadership training workshop for young people from all over the state, many from regional communities.

As with all Fogarty Foundation projects, there is an expectation of mutual obligation so participants share their newly expanded skills with their own community by undertaking to organise an event for other young people. As Annie says, "This provides a triple benefit – and can create a true ripple effect." One recent example of the program's effectiveness emerged at the wheatbelt town of Beverley where, just a month after their latest program, three new projects were developing: a new bike track, conversion of a disused fire station to a youth centre and establishment of a community cinema.

This concept is always being improved. One new development is that trainers now visit participants in their communities and help them develop a support network from the beginning. Negotiations are also now underway with training providers so that participants can access 'Recognition of Prior Learning' and gain accredited skills. This may help in further education or employment but is also important recognition of their role as a volunteer.

As part of their focus on education, the Fogarty Foundation currently has programs with two universities. One is a significant undergraduate scholarship and educational excellence program, established with the University of Western Australia. The Foundation has also funded Edith Cowan University (ECU) to establish both the Graduate Certificate of Learning Difficulties and a special-purpose professional development facility. Inspired by ECU Professor Bill Loudon's vision that every primary school should have at least one member of staff trained to work with children who have learning difficulties, the Foundation provides scholarships for around 27 students per semester to undertake the course. The professional development facility is already invaluable in helping educators learn and then put into practice one-on-one teaching techniques in literacy and numeracy.

These initiatives are still in their early days but if they fulfil even half of their potential, Western Australia will continue to benefit long after Annie and Brett's children have grown up – and probably long after their great-grandchildren have grown up.

An Entrepreneur's Approach

Forget the Eighties. "Entrepreneur is just a French word for someone who can start something." So says Kalgoorlie-born Western Australian businessman, Phil Crabb. A self-described entrepreneur, "through and through", Crabb argues that society badly needs more of them to get involved in philanthropy.

Phil Crabb has always been involved in fundraising of some form or another, mostly for sports clubs and charities but for much of the last decade he has taken on a particularly committed role in raising funds for cancer support. He is especially committed to the need for better support services for cancer patients and their families, believing that this is where the "hope factor" can come in. His most notable projects have included the development of Crawford Lodge a regional supported accommodation facility for cancer patients and Balya, a retreat for patients and their families at Gidgegannup in bushland along Perth's northern edge.

Described by others in WA as the most hands-on, hard working philanthropist you are ever likely to come across, Phil believes that, much like business ventures, to make a difference for a cause you need to work at it. "You really need to focus if you want your contribution to be effective," he says. "My advice is stick to one project and really knock it on the head before you take on another one." It's an approach that requires much more than dollars. "Real philanthropy lies in giving your time, whether you have money or not."



"Real philanthropy lies in giving your time, whether you have money or not."

Generally preferring to stay low profile and have the attention on the cause itself, he is outspoken on the need to involve more people in philanthropy of all kinds. "It's important for everyone in the general public, wealthy or not, to understand the contribution that philanthropy is making to everyday life."

So why is entrepreneurship so important? Phil says an entrepreneurial flair can make a big difference to a project's success. A good example is when, as well as helping with fundraising for Crawford House, he was also able to broker a deal with former Premier of Western Australia, Richard Court, that, if they got the Crawford House facility built, the government would subsidise the cost of each night's accommodation. He has also been able to use his business contacts to get the mining sector involved. "And entrepreneurs are used to knock backs. We just let them wash off," he adds wryly. "We know that you have to put up with a lot of failures to get the successes."

So where did the urge to help come from? Phil credits it much to his mother who he remembers as always helping other people in need. He was also influenced deeply by the poverty he saw in the aftermath of World War II, promising himself that if he was ever wealthy enough to do so, he would do what he could to help. "My mother taught me to remember that there is always someone worse off than you. I have never forgotten that."

So what's next? Phil has promised his wife he will take a bit of a break. But after that, he is keen to keep supporting the Balya centre to fulfill its potential. His interest in finding ways to help with the psychological effect of serious illness on families is stronger than ever. He has also been thinking about the need to raise funds for war memorials and other forms of recognition for returned soldiers. For Phil Crabb, this would be about reminding young people that "There were people that cared then. And there are people that care now."



Hanging Out

Young people now have somewhere safe, supportive and welcoming to hang out in the inner city, thanks to the highly successful Headquarters youth facility.



Good Service

From the most remote country towns to the centre of big cities, service organisations like the Lions Club, Apex, the Soroptomists and Rotary are making contributions that are more sophisticated, ambitious and strategic than ever before. Here's just two recent Perth Rotary projects.

It All Started With a Few Skateboarders...

Often the best way to start a project is to set a direction but not a destination. The Headquarters project shows what can happen when grass-roots philanthropists see a problem but then start asking brave questions rather than jumping to answers. It's also a remarkable tale of the value in taking a stewardship, not ownership, approach.

In 1996, Heirisson Rotary Club members Liz Pattison and Les Cooper realised there was a chronic need for an inner city skate facility where young skateboarders could be welcome and not face continual complaints and fines. But their early conversations hardly hinted at the amazing Headquarters Youth Facility they would lead to. The two friends soon had active support for a skate park project from everyone in their 55-member club and they started talking to other people about what was needed. They were joined by community member, Ian Matthews, who was assisting skateboarders at that time.

Both Liz and Les have strong business backgrounds and tend to think in terms of strategies and systems, so, rather than just assuming they had the answers, they started asking questions – particularly of young people themselves. And that made all the difference. The Rotary members soon learnt much more about what was needed to help young people feel welcome in the inner city and the skate park idea soon become just one part of a much bigger plan – to build a diversified inner city youth facility.

It always seemed like a big task but they had no idea of just how big, complex and demanding it would become. Ahead of them were four years of hard, often heart-breakingly frustrating, work that involved everything from detailed socio-demographic research to fighting insurance battles to extended negotiations over heritage requirements and of course the constant worry about funding. It took two years just to secure a site and until 2001 before construction could finally begin. By this stage the members of Heirisson had put in more than \$25 000 in cash and, together with other supporters, over \$1m in pro bono work. Liz admits there were many stages where the obstacles seemed so overwhelming that giving

up seemed not only tempting but downright sensible. "But we had told the young people involved that we could do it, and committed to them that we would do it. Admitting defeat to each other was one thing but we couldn't bring ourselves to admit defeat to them. That kept us going back to the drawing board."

With consistent support from Lotterywest, the Department of Sport and Recreation and the Town of Vincent, and assistance from a wide range of sponsors, the \$3 million Headquarters facility finally opened its doors in Leederville at the beginning of 2002. As well as the long awaited and very popular skate park, it has, from the outset, offered the music, art, IT and environmental programs that the young people involved had asked for. There are now also extensive and leading-edge work experience initiatives and highly successful cooperative programs with the Department of Education and Training.

Among philanthropy's most difficult challenges are issues of ownership, and eventually, of moving on. From the outset, Heirisson Rotary Club saw Headquarters as a project they were guiding, not owning. Even from the earliest meetings the vision was for an outcome owned by others – especially by young people themselves. This, almost parental, approach to philanthropy – it involved making tough decisions along the way, showing leadership at times, being in things for the long haul (no matter what happened) but always allowing the project to find its own way forward, being ready to provide whatever support was needed.

Now, Heirisson Rotary, together with the HQ Board, is letting this particular baby leave home. They have spent much time and effort trying to provide for the best possible future for Headquarters, knowing that this would mean letting go of what they have created and loved. The Headquarters project is now set to come under the wing of the YMCA and the 'parents', proud as punch about its achievements so far, couldn't be happier about its prospects for the future. Sometimes people have an exit strategy for each philanthropy project. The Headquarters project reminds us that perhaps what is needed most is an evolution strategy.

It Started With David's Dad..

Many community-minded people credit their parents as a major influence. For David Reed it was his father. Whether it was gifts to the Little Sisters of the Poor or his years spent in Rotary, the elder Mr Reed's ongoing generosity made a big impact on his son. David has followed his example and devoted much time and energy to Rotary, playing a lead role in some of Perth's most remarkable success for the club. He describes it simply. "Rotary gives you opportunities to do things."

One of those 'things' is the Passages project, of which he is chair. At an ideas-sharing meeting of Rotary club presidents in Sydney in 1996, David was inspired by the success of Father Chris Riley's Youth Off the Street project which started offering accommodation and evolved to providing other support services including drug rehabilitation and educational help. Back home, he started working with both the Drug Awareness committee of the Catholic Archdiocese to explore what could be done in Perth – and of course the tricky question of how. The model they went forward with had St Vincent de Paul as the operating body with Rotary as the financing body. St Lazarus and the St John of God Foundation were founding sponsors. They opened their first house in 1999 which proved so effective that the program has since moved a few doors along to bigger premises. They now have 5 full-time staff (all social workers) seeing up to 40 young people a day. "The idea behind it is to help them find a passage to a better life. Drug rehabilitation, accommodation, access to psychological or psychiatric support. Whatever they need, we try to help them get to it. We have had no government support – it has all been done by philanthropy. We raised \$1.6 million from the business and mining communities.

He ... worries that today's up-and-coming business and professional leaders don't seem to realise how privileged they are ...

David's contributions are mentioned often by many in WA's philanthropy circles but he is just as quick to credit others. "Another big factor for us has been the generous support of [well-known Perth businessman and philanthropist] Jack Bendat. "Jack understands and respects the Rotary approach," says David. "We have the Norman Brearley Fund. Jack donates to that because he trusts us to use the money properly and well – whether it's on Passages or not. He also understands what it takes to make it work. For example, when I talked to him about how our accommodation should be furnished, he was very clear about what he wanted to be supporting. He said to me, "I want a house just as though you live in it. I want the furniture to be exactly what you'd live with, we have to have it pretty upmarket, so that the kids actually respect what we are providing for them." Before this we had old lounges – they cut the upholstery and painted on the walls. Now I think they appreciate what we're doing much more."

Philanthropy can be circular, especially in a city as small as Perth. The St John of God Foundation was part of the Passages project and that's

how David found himself playing a lead role in their Lighthouse project. "Lighthouse is about helping kids who are displaced for some reasons: because the parents have died or can't cope, or there's been a split up. Most of them have troubles in some way, they're not perfect, but they're not street kids. We try to keep them at school or if they're in an apprenticeship we try to support them to further that. They live five or six in a house with adult support and certain rules like doing the dishes and helping out with chores. The Rotary Club of Matilda Bay raises funds for us each year for this and Jack has been very generous again. His own father is 102 and still helping street kids in LA so troubled kids hit a part of Jack's heart. We have support from Homeswest (the State Government's housing service) who provide us with the actual house."

After nearly four decades in stockbroking David has seen and heard enough for some clear concerns. He would like to see more of WA's wealthiest people realise more about the social challenges out there and the kind of money required to address them. "A small number of people are very generous and always asked, but then others who are seriously wealthy only give \$100." He believes all companies can benefit from being good corporate citizens within their communities and that more companies should learn from the examples set by Wesfarmers or Woodside. Conversely he would also like to see the community itself get involved more in solving its problems, whether through an organisation like Rotary or some other way. "The question is how do we get them in?" he wonders. He also worries that today's up-and-coming business and professional leaders don't seem to realise how privileged they are and are not showing as much in the way of civic generosity as his own generation. But he sees the best way to deal with each of these challenges is to just get out there and do it. Prove it can work. "Hopefully blokes like me will live another twenty years or so and persuade them," he says with a smile.



David Reed (right) at Passages with the centre's Manager, Rod Mapstone. Between 1999 and 2003, this Northbridge facility saw 4,749 individual clients who made 17,188 visits to the centre using services 27,699 times. Passages also made 4517 referrals.



Among the Rio Tinto Future Fund's partnerships is an innovative relationship with WA's peak organisation for contemporary craft and design, FORM. These exquisite seed pods are from the *Genus Australia* exhibition, just one of the recent projects facilitated by this partnership.

Rio Tinto and Partners

Rio Tinto is a major global corporation with a fresh take on philanthropy. The WA Future Fund is the company's largest example of their partnerships-focused cross-sector approach that prioritises social investment over logo placement.

Many of the world's resource companies have undergone major shifts in thinking about corporate citizenship over the last decade or so. For Rio Tinto this has involved taking a very considered and comprehensive approach based less on brochures or advertising and more on investing in genuine external relationships. Rio is very much a global company but it has a very significant base in Western Australia through its ownership of businesses such as Hamersley Iron and Argyle Diamonds. The parent company's global emphasis on partnerships led to the establishment in 2001 of the Rio Tinto WA Future Fund. With a \$2 million budget per annum, this is one of Rio's largest such funds in the world.

Their approach was quite unique at the time – driven by a desire to move beyond the traditional (and typically passive), donor-recipient model to one based on a relationship and genuine exchange of benefits other than the usual sponsorship offerings. The idea was to “..create a vehicle that would be regarded as a credible contributor to the future success of Western Australia... (and) a platform that would allow the company to engage more meaningfully with its stakeholders.” And where a resource company's view of its stakeholders can tend towards the narrow, Rio Tinto has consistently been broadening its definition, backed by a \$2 million per annum commitment. All this is in addition to the corporate philanthropy and sponsorship initiatives of the individual businesses within Rio Tinto.

Three years along, fund manager Tania Hudson says the Future Fund has come a long way. Not just expecting partners to communicate openly with them, the fund has developed ways to communicate

better themselves, not just including newsletters, annual reports and a website but also regular workshops with all partners. These workshops have proved very successful for all involved – generating new insights into how partnerships can not just stay relevant but actually grow more valuable for all involved. They are also important networking and professional development sessions for partners themselves. At the most recent workshop, for example, discussions focused on:

- Measuring and communicating success
- Planning for program sustainability after a partnership agreement expired
- How Rio Tinto could be more flexible in its definition of partnership to allow for greater evolution during a project
- The strengths and weaknesses of formal partnership agreements
- The pros and cons of increased professionalism within cross-sector partnerships
- The perennial challenge of how to do more with limited resources.

Building and maintaining a good relationship is never easy and business-community ones are no exception. Tania, whose own background is in media and corporate affairs, says everyone fancies her job but the reality is a lot less glamorous than it seems. Choosing which relationships to commit to is no easy task and requires a significant investment of time for both prospective partners. It can also be quite confronting as all partners need to get past the old-fashioned assumptions about power lying with whoever has

the money. Rio Tinto's approach involves a detailed partnership agreement that comprehensively considers the specific objectives, deliverables, timelines and budgets of the partnership and outlines how each partner will add value to the other.

Looking forward, Hudson says the Rio Tinto Future Fund will be sticking to the general principles that have been working well so far and building in more direct relevance to the company's businesses. They will also be further developing their current work partnering with academia to evaluate the effectiveness of the fund as a whole. Her advice to other organisations thinking about taking a partnerships approach to philanthropy is to think very carefully about what you want to achieve. Partnerships are not the soft option that many people think they are – in fact this is a much more difficult approach to do well than passive philanthropy. But the benefits can be much greater for all partners if you get the relationship right and make the commitments 'hard core' on both sides.

Partnerships in Practice

Since inception in 2001, The Rio Tinto Future Fund has established a remarkably wide range of partnerships. Here are a few highlights:

Kids' Science State

Building on their existing relationship with Scitech Discovery Centre, the Fund is now enabling a new program aimed at reaching and inspiring teachers, parents and children with science and technology. This program includes focussing on a larger number of small communities than ever before achieved in Western Australia.

The Smith Family

This partnership is multifaceted including the Learning for Life program with its innovative new Grandparents initiative. This program began in the Girrawheen area but has now been expanded to Kwinana, and, in the process, now includes Rio Tinto subsidiary business Hismelt in the partnership.

Rio Tinto Child Health Partnership

An exciting initiative arising out of Western Australia but also including the Northern Territory and Queensland. The project partners include Rio Tinto entities Comalco, Argyle Diamonds, Rio Tinto Iron Ore, ERA and the Rio Tinto Aboriginal Foundation and the Future Fund, the Alcohol Education and Rehabilitation Foundation and the Telethon Institute for Child Health Research. There are three core projects in this ambitious \$5 million program: Project 1 is about modelling aboriginal child health data, Project 2 involves programs to reduce exposure to smoking and alcohol during pregnancy and Project 3 focuses on increasing community capacity to shape and deliver child health initiatives.

Conservation Volunteers Australia

A four year partnership to create the Future Volunteers program in the NorthWest of Western Australia

Department of Sport and Recreation

The Rio Tinto Volunteer Management Scheme is a four-year partnership based on a successful program piloted in regional WA. It aims to address issues around recruiting, training and managing volunteers, particularly in the recreation sector.

Designing Futures

A four-year integrated industry development program for the craft and design sectors in Western Australia. Partnered with Form (previously known as Craftwest) this project has included work on raising international exposure, local skill development and creation of supporting strategies as well as new industry leadership program.

Rory's Other Cases

“He hates fundraising but does it anyway.” Jan Yerkovich says. Rory Argyle's sense of civic duty is so strong that he has led ten of her fundraising committees already and she considers him one of the most effective committee chairs she has worked with.

After more than thirty years in the legal world as a leading Perth lawyer and partner in a major firm, Rory Argyle works as a consultant and business leader. But throughout both careers, he has always divided his time between his professional roles and his civic ones.

Among his contributions to the community are a long list of capital fundraising projects, many of them with Jan Yerkovich behind the scenes 'marshalling the forces'. He belongs to the school of thought that the professional fundraising approach epitomised by Jan is particularly effective. “I think it's a good model. You have to introduce the discipline into it – that's what she does. She doesn't raise the money but directs the people involved. She provides the structure - and if necessary, the needle to get things going.”

One campaign he chaired and which stands out in Rory's memory was for the Leeuwin Ocean Adventure Foundation. “The Leeuwin” is a majestic tall ship used to offer unique self-development experiences in terms of leadership, team skills, community spirit and environmental awareness to young people. The concept was based on similar ventures in New Zealand and the UK. Fundraising to get this 55 metre, 3 masted work of craftsmanship ocean bound was particularly challenging. Rory remembers “It is one thing to raise money for a good national cause like Red Cross where everyone understands what that's all about. It's another thing for an unusual project like this when you have to explain the purpose and how it's going to work. You need to convince all the sceptics who thought that even if we built it we wouldn't be able to sustain it.” So how did they do it? By going step by step, building more strength at each stage. “We started by just asking individuals to give us \$250 of seed funding. We got a thousand supporters. That let us print the brochures and hire someone. Then we went to corporates and government for construction funding. We also obtained a major grant from the Australian Bicentennial Authority. We were then able to sell a big sponsorship to Barrack House and Denis Horgan, in conjunction with the 1987 America's Cup defence off Fremantle. Once we communicated how innovative the program was, and the value it would offer young people, we found major companies were happy to support us. Companies like Wesfarmers, Mt Newman Mining and Hamersley Iron. But in the end we were \$400,000 short and the builder would not release the ship from the yard without payment so I worked out a program of how to get it – and I've used this approach for other causes since then. We didn't want to fiddle around asking for nickels and dimes and we could demonstrate an 'urgent critical need' so we said, “This is what we must have by 'x' day. We've split it into 40 shares of \$10,000 each. We have forty bunks on the ship. Everyone gets their name on one and also inscribed on an honour board which will be maintained on the ship. Are you in for \$10,000?” That generated a rolling effect of peer influence. We got the last money in 3 weeks.”



to move into large gifts (capital fundraising). Jan remembers that West Australians were generous but the community didn't have a strong history of giving like in other states. In many ways, this lack of philanthropic history actually turned out to be an advantage, by forcing the fledgling fundraising industry to get more sophisticated more quickly. Many of Jan's projects have been launch campaigns, getting an organisation or project off from scratch.

When asked about the secret to effective capital fundraising, Jan says there are three "First the cause, second the project and third the people involved." She warns never to underestimate the importance of the honorary fundraising team – those well-connected business and community leaders who will spearhead your campaign. "These people are connection-rich but very time-poor, that's where we come in. As consultants we make it easy for them. We do the strategy, video, brochure, database, everything. We have a working agenda to make it easier for the Chairman and it is our job to really drive things forward."

Life in philanthropy is a rare privilege. It is not for the faint-hearted as a career, but for Jan, the pursuit of social capital has become a driving force in her life. Professional fundraisers work with some of the most passionate, sophisticated, creative and dedicated people in the community – either as donors or recipients – and it's FMC's job to bring them together in a way that the community will benefit from. Matching dollars to dreams. "It's very inspiring," says Jan. "Especially when dedicated philanthropists like Michael Chaney, the late Harry Perkins, Jack Bendat and the McCusker family get involved. On one of our projects Bill Wyllie not only gave money – he also helped the organisation achieve new financial independence by restructuring their real estate assets. It made a huge difference."

"Fundraising Management Consultants raise money in every state and, as far as I am concerned, WA leads the way in terms of the big gifts. Five million, three million and one million dollar gifts are frequent in WA. There are more people with more capacity in the other states but they only give to a few things, while most WA philanthropists give to everybody who asks. I always say there's only 20% of the community that gives anyway so we haven't got a very big marketplace. Of that 20%, 2% of people give to everything and the other 18% have to be convinced." The competition is tough; universities, schools, medical research and charitable organisations all require philanthropic support."

Jan feels there are several factors that have made WA such a generous state. "The first reason is that the community has always felt a bit isolated here and that this meant it needed to provide facilities for itself. Another reason is that corporate giving has been strong in WA for many years. But Perth's size matters, too – it feels as if everyone knows each other. This means the networks operate well – it also means Western Australians feel a sense of pride, connection, ownership, responsibility and duty."

"Over the last 20 years in WA, the campaigns we have been part of have raised \$400 million. That's a lot of money for a little state." Jan Yerkovich

The Art (and Science) of Fundraising in WA

Falling into fund-raising by accident 25 years ago, Jan Yerkovich's approach may not suit everyone, but it has been enormously successful in the West, and now makes an impact across the nation.

"Ten times more generous. There have been more large gifts made in Western Australia than anywhere else in the nation." Jan Yerkovich of Fundraising Management Consultants Pty Ltd (FMC) does not mince words when you ask how WA rates philanthropically in Australia.

The outgoing and ever-energetic Jan is an institution in the West's fundraising community and she is one of Australia's foremost leaders in this ever-challenging industry. This career began as voluntary work on behalf of the Australian Neurological Foundation while staying at home to raise her children. At the time, Jan remembers "I was interested in public education – especially about strokes because my mother had a stroke. Before I knew it I was working 5 days a week. I never intended to do fundraising but everyone needed money and I started from there." After she moved to work for the Multiple Sclerosis Society, Jan came to realise fundraising needed to be seen as both an art and a science. She was inspired by a fundraising conference

A Practical and Passionate Philanthropist

Janet Holmes à Court is passionate about supporting her causes both financially and practically and just as passionate about her views of what roles philanthropy should and shouldn't be expected to undertake. She also describes herself as "pretty awful" at fund raising...

For Perth born-and-raised Janet Holmes à Court, chair of the large and diversified company, Heytesbury, philanthropy is just another way to be a participant in life, rather than just a spectator. She believes strongly that it is important to be guided by where your contribution will be most useful, and that this, inevitably will be where your own passion and interests lie. It's a philosophy that has led this former science teacher to devote significant chunks of both her time and her finances to the arts.

She chairs the boards of the WA Symphony Orchestra, the Black Swan Theatre Company and the Australian Children's Television Foundation. She has served on committees and boards for many other art-related organisations and charities.

The Western Australian Symphony Orchestra (WASO) and Black Swan Theatre Company have both been successful at developing a strong base of corporate support. WASO, in particular, has been successful in this respect, more so than their counterparts in other states. But Janet is the first person to lay the credit for this wholly at the feet of the staff and board committee members involved. In fact she considers herself "pretty awful" at fund raising.

Some of this may come from her very community-minded mother who, while generous of time and money despite modest means herself, taught the young Janet to be careful about making judgements, much less statements, about who gives what, how much or where. "I remember when collecting donations with my parents that it was all too easy to make observations about how much people gave compared to how well-dressed they were," she recalls. "My mother would warn me not to judge others by what they wore or by whether they seemed to give. She reminded me that I did not know whether they gave elsewhere or not." These days, this approach makes Janet aware that it is so easy for people to have a very mistaken perception of how much she and others give. This is part of why she doesn't like to have to use relationships to "tap someone else on the shoulder" and ask for a contribution. "I am always conscious that I don't know

any more about their giving than they know about mine," she says.

She is generally optimistic about the future of philanthropy in Western Australia and remembers that she and her late husband Robert were struck by the community's generosity when their company owned local television station TVW 7. "The local Telethon was already raising money at the rate of about \$3 per head, which to the best of my knowledge is still a world record," she recalls. "It's quite extraordinary." Her view is that, as long as the not-for-profit sector can continue to be relevant and tap into that generosity, community-driven philanthropy in Western Australia will continue to flourish.

This optimism is sobered by her views that a lack of vision is being shown by both State and Federal Governments. Like many people active in philanthropy, she would dearly like to see government play a stronger facilitative role with initiatives such as greater tax incentives to attract more people into giving, and those already giving to give more. But she is particularly passionate and outspoken about her concerns over the government response when an organisation has been successful at fund raising. "They use that as an excuse to withdraw more and more public funding until organisations like WASO cannot even turn the lights on without philanthropy. This renders fund-raising success very much a double-edged sword. Too much reliance on philanthropy and sponsorship leaves an organisation very fragile and vulnerable to outside forces. You only need one big sponsor to pull out and you can be in dire straits. The dependency it creates is not good for any of the parties involved – short or long term. For example, it can make corporate or private donors wary of entering new partnerships where base-level funding is not in place. We are now turning the tables whenever we can and involving our corporate partners in putting pressure back on government to provide proper levels of base funding so we don't have to worry about opening the doors." It's a concern that would ring true to many in Australia's philanthropic community.

A Man With a Plan

– The Foodbank Story

Talking with Doug Paling, CEO of WA's outstanding Foodbank organisation, is like leaving the video remote on fast forward playing your favourite show. It soon becomes clear why Foodbank has been so well supported by WA's corporate and private philanthropists.

Foodbank WA is a not-for-profit, non-denominational organization providing food to over 450 registered charitable and welfare agencies. Since 1994, Doug and his team have distributed more than ten million kilograms of food for many thousands of disadvantaged people. With only 6 full-time staff, 8 part-time staff (all with disabilities) and a dedicated crew of volunteers, this has been no mean feat.

Doug unabashedly says that WA is by far the most successful and mature branch of the Foodbank Australia network. "There is a big difference here to the rest of Australia. Our isolation has enforced our innovation," he says. He believes their success is due to their approach of applying corporate discipline with a compassionate heart. It was his own background in catering and business that led Doug to approach the challenge very much as a strategic business, using thinking learnt from the corporate sector – not only to help Foodbank work with businesses, but even more importantly in continually learning how Foodbank can be most effective. "Foodbank has challenged the perception of what a community agency is and how it works," he says.

It is probably not just isolation – but the sheer size of the task that has forced their innovation. The cost – and logistics – of running a charitable food distribution agency throughout a state the size of Western Australia, with the climatic variations and population density of the state is enough to make even the most ambitious head spin. Although Foodbank WA does receive support and assistance from various state and local government agencies, this alone can never come close to making the task feasible. From the outset, it was a necessity that Foodbank excel both at attracting philanthropic support and developing genuine partnerships. Necessity in this case has certainly been the mother of invention as these are now among Foodbank's greatest strengths. Their honour board includes over 500 organisations that Foodbank WA has developed partnerships with – and it represents all sectors of society.

For Doug the key factor in developing relationships is to have a great concept with a compelling business case. "I've always found that you just give the story. You don't invade people's personal space. You just create a situation where you're two or three steps away from each other and make the invitation for them to step forward. I find usually they do."



Foodbank's relationship with Burswood Resort started in 1999 when the Burswood kitchens began making an extra quantities of each batch of soup. This meant more than 25 litres of

fresh nutritious soup was going to charitable organisations each day (more than 140,000 serves since 1999). The relationship has since evolved to include a \$50,000 donation to the new Foodbank metropolitan warehouse.

Those relationships have grown so strong that the latest of Foodbank's regional offices was opened recently in Bunbury with everything, from the land, to the buildings, to the equipment, being donated. This makes it clear that Foodbank's role is now as much about facilitating other people's contributions as it is about distributing the food itself. For Doug this is a very important aspect of the Foodbank concept – its potential to bring business, the food industry, government and the community together in finding solutions to the problems of hunger and poor nutrition – wherever in the world they are found.



The Family that Gives Together...

Three members of Perth's philanthropic Wyllie family, Bill (left), Melissa (rear) and Rhonda (right). As well as giving funds, the Wyllies like to find other ways to help.

Giving, Wyllie-Style

Award-winning WA philanthropist Bill Wyllie AM likes to really get involved with the projects he supports, offering as much value with his business skills as he can with his chequebook.

Nearly four decades of community involvement have given Bill Wyllie a lot of stories to smile about. And it's been nothing if not an interesting journey. As well as extraordinary financial generosity, Wyllie has lent his considerable business acumen and influence to a much wider range of issues than most philanthropists. He has been active at the forefront for a wide range of community groups, causes and charities and played a leadership role on issues including air pollution and vocational training. For 28 years most of these efforts were in Hong Kong where he was living and leading a dynamic career in corporate rescues. Now he lives in Western Australia where he and his wife Rhonda, not only run the highly diversified family business, the Wyllie Group, but are also active and highly involved supporters of many charitable causes. Daughter, Melissa Wyllie, now a director of the company and involved in the day to day running of the family business, continues the philanthropic legacy by assisting her parents in the administration of their substantial annual donations budget.

The organisation they have been associated with the most is the Salvation Army, continuing a strong connection with the charity which dates back to Bill's Perth childhood when the Army helped him and his family through difficult times. Some years ago in Hong Kong, he financed and built a multi-level primary school which housed 1,500 students over 6 floors. Two notable projects with the Army here in WA have been the provision of \$1,500,000 for the purchase of 5 acres of land and a new building for the Crossroads West youth support program, and the new Warrinacare and treatment facility for Alzheimer's and other forms of dementia. Among the Wyllies' other major donations

to approved charitable organisations in recent years have been \$500 000 to the Lions Eye Institute Research Facility Building Appeal, \$300 000 towards the development of new facilities for the Speech and Hearing Association, \$350 000 for the new headquarters of the Arthritis Foundation and \$250 000 to assist in establishing a chair of Urology at the University of Western Australia. It's an impressive list for any philanthropist but for the Wyllies, it's only half the story.

Bill's long track record of active community involvement is an incredible resource to draw on when helping an organisation find a way to fulfil its aims. Bill describes the Wyllie approach simply as finding ways to make the dollars go further. "We believe in maximising and optimising value," he says. The Salvation Army's Crossroads facility is a perfect example. "Their existing facility was very run down. We found an alternative site, bought the land and helped develop the facilities." For the Speech and Hearing Association, they had agreed to donate funds but in working with the organisations, found that he could add an enormous amount of extra value by helping them restructure their existing real estate assets. On their behalf he also negotiated a deal with Telethon to match the Wyllies' own annual donations of \$75,000 – an arrangement which has now been increased to \$100,000 and extended for several more years.

It's little wonder that the Wyllies have received plenty of recognition for their contributions, most recently the inaugural annual United Way Award for Outstanding Philanthropy. Western Australia is very glad to have them home.

News and Views

ANZ TRUSTEES TO MERGE WITH EQUITY TRUSTEES

ANZ's trustee business is merging with Equity Trustees to create Australia's third largest trustee company and the country's leading manager of charitable foundations.

The key points in the agreement are:

- ANZ will become the major shareholder in Equity Trustees with a 37.5% share of the expanded issued capital, and will receive \$3 million in cash
- The merged entity will be Australia's largest manager of charitable funds with over \$800 million in assets
- ANZ's traditional role in the charitable trust sector will be maintained in the merged company through the formation of a new ANZ Philanthropy Board to oversee grants by the charitable trusts connected with Equity Trustees
- ANZ will have the right to nominate two members of the Equity Trustees Board.

"We are pleased to have reached agreement with Equity on the terms of a strategic partnership," said Peter Hawkins, ANZ Group Managing Director Strategic Development.

"The partnership will allow us to participate in their growth and success and also to continue our involvement in the important philanthropic work done by our clients' charitable trusts," he said.

Managing Director of ANZ Trustees, Mr David Ward said "Together the businesses will be stronger and enjoy the benefit of greater economies of scale than each of the current stand-alone businesses. This will be a good outcome for the clients of both companies."

Completion of the merger is expected early in 2005 subject to the outcomes of due diligence, regulatory and government approvals and approval by Equity Trustees' shareholder.

INSPIRE CELEBRATES

The Inspire Foundation celebrated its two millionth visitor to the Reach Out! Website with a Reception at Sydney's Government House in late September.

The Inspire Foundation, which is dedicated to delivering services to young people experiencing tough times, is probably best known for its internet service, but has also instituted the Beanbag Program and the ActNow! Volunteering initiative.

The Sydney reception was hosted by Inspire's Patron in Chief, the Governor of NSW, Her Excellency Professor Marie Bashir AC and her husband Sir Nicholas Shehadie.

Another Inspire Foundation patron, Cathy Freeman, congratulated the founder and Executive Director of Inspire, Jack Heath, for his vision and thanked the foundation's staff for their commitment and hard work.

A highlight of the celebration was the video that was created for Inspire by two volunteers who were introduced to the Foundation by goodcompany. This is a service that matches professionals who wish to volunteer their services with not for profit organizations seeking assistance.

The Inspire Foundation can be found at www.inspire.org.au and goodcompany at www.goodcompany.com.au. The Reach Out! website is at www.reachout.com.au



'STAND LIKE STONE' MOVES LIKE WILDFIRE!

The Stand Like Stone Foundation (a new community foundation established for the benefit of the Limestone Coast community in South Australia) was officially launched throughout October.

Executive Director, Jan McIntyre explained that an entire 'Philanthropy Month' had been declared, so that the wide range of communities served by the foundation could participate in the launch.

The month commenced with a media breakfast in Mount Gambier, followed by receptions in Robe, Lucindale, Millicent, Mount Gambier, Kingston, Port MacDonnell, Keith, Bordertown and Naracoorte.

Each launch was conducted by local community leaders, and addressed by the Stand Like Stone Foundation Chairman of Director, Sue Charlton.

The foundation was recently successful in obtaining DGR and ITEC status.

"On behalf of the Board, I would like to extend our thanks to Catherine Brown and Alice MacDougall who have been very supportive and kept the lingo in layman's terms," Ms McIntyre said.

"Special thanks to the South East Area Consultative Committee without whom we would not exist, FRRR for establishment funding, and Philanthropy Australia (especially Andrew Lawson) for their great support.

"We can start the real work now!" she said.

For those who missed the explanation in Edition 54 of Australian Philanthropy, the foundation's delightful name comes from a poem by Adam Lindsay Gordon:

"Life is mostly froth and bubble
Two things stand like stone
Kindness in another's trouble
Courage in your own."



LODDON MURRAY COMMUNITY LEADERSHIP PROGRAM

Philanthropy Australia members were well represented at the Melbourne visit of the 2004 Loddon Murray Community Leadership Program in August.

The group of 28 program participants from the length of the Loddon Murray region attended a panel discussion and presentation with Martin Carlson (Trustee, Williamson Foundation), Genevieve Timmons (philanthropic consultant) and Sue Roff (Executive Officer, RACV Foundation).

The session was titled "The Winning Formula - Does It Exist?" in the context of grant seeking and leadership.

PHILANTHROPY RESEARCH PROJECT

The Prime Minister's Community Business Partnership has commissioned major research on Australian philanthropy and the fundraising and development capacity of the not-for-profit sector.

This research project will expand upon the Australian Bureau of Statistics' (ABS) Survey of Individual Giving completed in 1997 and the ABS Business Generosity Survey commissioned in 2000-2001.

The research will provide information about the culture of philanthropy and levels of individual, family and corporate giving in Australia, as well as help measure the effectiveness of tax incentives introduced to encourage philanthropy. It will also look at the current and potential capacity of community organisations to raise funds and build their resources.

It will examine all forms of giving for community benefit, ranging from donations to sponsorships and partnerships.

The research will be conducted by the Philanthropy Research Development Collaboration - a consortium comprising the Australian Council of Social Service (ACOSS) as the lead partner, Queensland University of Technology's Centre of Philanthropy and Nonprofit Studies, the University of

Technology Sydney's Centre for Australian Community Organisations and Management, Roy Morgan Research, McNair Ingenuity Research Pty Ltd, and the Australian Fundraising Institute.

Through a combination of research methods (literature review, qualitative, and quantitative), a comprehensive picture of giving in Australia should emerge. Researchers will conduct 30 focus groups and 24 in-depth interviews across Australia to find out about people's attitudes to and motivations for giving. Expert panels will be involved to comment upon and elaborate on the main themes that emerge from these discussions. Surveys will then be conducted with individual households and businesses, as well as with a wide range of fundraisers and charities. A final report from the research project is expected to be available by mid 2005.

RECENT EVENTS

Investing for foundations - July

John McLeod from Goldman Sachs JBWere Philanthropic Services and Hugh Hodges from ANZ Trustees spoke to Philanthropy Australia members on the topic of 'investing for foundations'. Hugh's presentation was focussed on the practice and process of investing for foundations and the various risks involved. John took a broader view and spoke about issues like 'mission related investing' and ethical investment. Further information is available on www.noyes.org/mrinvest.html. Australian Philanthropy hopes to provide more information on these challenging ideas to those unable to attend the forums. Stay posted early next year!

QUT Australian Family Foundations Forum - August

David Gonski AO, Chairman of Investec Wentworth Pty and Ltd and President/Chairman of the Australia Council for the Arts addressed this forum in Sydney. He spoke about his experience with establishing a Prescribed Private Fund.

Jane Kenny, Membership Services Officer Philanthropy Australia, has written a comprehensive summary of this intensive day of information and discussion, which included presentations from Prof Helmut Anheier, Dr Diana Leat, Sally White of the Vincent Fairfax Family Foundation, and Layne Beachley of the Aim For The Stars Foundation, to name just a few.

Indigenous health: issues, solutions and making a difference - September

Damian Griffiths of People with Disabilities presented a paper to the Indigenous Affinity Group in Sydney. He explained the background to the establishment of the Aboriginal Disability Network, which was set up under the auspices of People With Disabilities, and gave some case studies of people it has worked with.

Aboriginal Disability the Australian Experience is a paper written by Lester Bostock, who is a Bundjalang man and the President of the Aboriginal Disability Network. He presented a paper at the Disability International Conference in Canada in September, in which he tells of his experience growing up black, poor and with a disability.

Measuring Social Capital in Australia - October

Elisabeth Davis from the Australia Bureau of Statistics gave a presentation to Philanthropy Australia members in Canberra on the work that is being done to measure social capital in Australia. She outlined how social capital is defined, what the ABS social capital framework looks like, what type of data is being collected and how the information might assist with policy development and evaluation.

Papers and transcripts from most of the above events are available to Philanthropy Australia members to download from the 'Events' section of the website www.philanthropy.org.au

Resource Centre

Briefing

There are many great new resources in the library this quarter; here is a selection of new books. Philanthropy Australia members are welcome to browse or borrow these resources.

Publications

- *The All-time Australian 200 Rich List: from Samuel Terry 'the Convict Rothschild' to Kerry Packer*
William D. Rubinstein, in association with BRW
Allen & Unwin, 2004

This fascinating social history includes accounts of many notable Australian philanthropists, both past and present.

- *William Lionel Buckland*
David T. Merrett
Commissioned by the Trustees of the
William Buckland Foundation, 2004

A biography of the original benefactor of one of Australia's largest private foundations, seeking to show how he made his fortune and what motivated him to make his generous bequest.

- *Australian Indigenous Guide to Philanthropy: a Guide to Accessing Philanthropic Trusts and Foundations for Indigenous Organisations and Communities*
Russell Smith
Victorian Aboriginal Community Controlled Health Organisation, 2004

Developed with assistance and funding from several philanthropic foundations, this publication will be distributed to indigenous organisations to raise awareness of the potential of philanthropic support and strengthen the capacity and grant-writing skills of indigenous organisations.

- *The Development of Community Foundations in Australia: Recreating the American Dream*
Diana Leat
QUT Centre of Philanthropy and Nonprofit Studies, 2004

Dr Leat's book is a fascinating study of the development of Australian community foundations, how the social, legislative and economic differences between Australia and the US have led to different rates and styles of development, and which models are more suited to the Australian climate.

- *An Examination of Tax-Deductible Donations Made by Individual Australian Taxpayers in 2001-02 (Working Paper No. CPNS 27)*
Myles McGregor-Lowndes and Stephen Marsden
QUT Centre of Philanthropy and Nonprofit Studies, 2004

- *Why Rich People Give*
Teresa Lloyd
Philanthropy UK, ACF, 2004

This book is the result of the first major research into the attitudes and wealthy people in the UK to money - how they create it, keep it and spend it. It provides an in-depth analysis of the motivations of the rich to support the charitable sector - or not - by giving money, time and expertise.

- *Rambam's Ladder: A Meditation on Generosity and Why it is Necessary to Give*
Julie Salamon
Workman Publishing, 2003

Nearly a thousand years ago Maimonides, the philosopher and physician known to his followers as Rambam, pondered issues of righteousness and obligation. Out of it came his timeless Ladder of Charity. With Rambam as her guide, the author explores the contemporary world of giving.

- *Richard Pratt: Business Secrets of the Billionaire Behind Australia's Richest Private Company*
James Kirby
Wiley, 2004

A biography of one of Australia's most prominent philanthropists.



Home and Abroad

Australian Events

Social Capital: Past, Present and Future Symposium

When: 7 December 2004
Where: Charles Sturt University, Wagga Wagga
Further Information: Rachael Williams, Locked Bag 678, Wagga 2678
Phone: 02 6933 4328
Email: rawilliams@csu.edu.au

Education and Social Action Conference

When: 6-8 December 2004
Where: Sydney, NSW
Further Information: Centre for Popular Education
University of Technology, Sydney
PO Box 123, Broadway, NSW
Phone: 02 9514 3843
Fax: 02 9514 3030
Email: cpe@uts.edu.au
Website: <http://www.cpe.uts.edu.au/forums/2004conference.html>

International Association for Public Participation National Conference

When: 6-8 March 2005
Where: Sydney
Further Information: Cheryl Robins, IAP2 Conference Secretariat,
ID Meetings and Events
Phone: 02 9965 4327
Fax: 02 9906 1955
Email: IAP2@idaustralia.com
Website: <http://www.iap2.org.au/whatson.htm>

National Child Health Conference

When: 28-29 April 2005
Where: Parramatta, NSW
Further Information: Sharyn Low, Matrix On Board
Phone: 02 4572 3079
Fax: 02 4572 3972
Email: sharyn@mob.com.au
Website: <http://www.mob.com.au/awch2005/>

Conferences: International

Community Foundations: Symposium on a Global Movement

When: 2-4 December 2004
Where: Berlin, Germany
Further information: c/oWorldwide Initiatives for Grantmaker Support (WINGS)
European Foundation Centre
51 Rue de la Concorde,
B-1050 Brussels, Belgium
Phone: +32 2 512 8938
Email: info@cfsymposium.org
Website: www.cfsymposium.org

Council on Foundations Family Foundations Conference 2005: Principled Giving for Family Foundations

When: 23-25 January, 2005
Where: Miami, Florida, USA
Further Information: Council on Foundations
1828 L Street, NW · Washington, DC 20036
Phone: +1 202 466 6512
Fax: +1 202 785 3926
Email: confinfo@cof.org
Website: <http://www.cof.org/>

Council on Foundations 56th Annual Conference: Building Strong and Ethical Foundations

When: 10-12 April, 2005
Where: San Diego, USA
Further Information: Council on Foundations
1828 L Street, NW · Washington, DC 20036
Phone: +1 202 466 6512
Fax: +1 202 785 3926
Email: confinfo@cof.org
Website: <http://www.cof.org/>

European Foundation Centre 16th Annual General Assembly and Conference

Foundations for Europe: Making the Union Work for All Citizens.
When: 4-6 June 2005
Where: Budapest, Hungary
Further Information: European Foundation Centre
51, rue de la Concorde
1050 Brussels, Belgium
Phone: +32 2 512 8938
Fax: +32 2 512 3265
Email: efc@efc.be
Website: <http://www.efc.be/aga/>



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The Mullum Trust
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The Stegley Foundation
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The Alfred Felton Bequest
Alfred Thomas Belford Charitable Trust
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The Australian Elizabethan Theatre Trust
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Bokhara Foundation
Brencorp Foundation
Burdeim Foundation
CAF Australia
The Caledonia Foundation
Calvert-Jones Foundation
Capital Region Community Foundation
Carleton Family Charitable Trust
The CASS Foundation
The Charles Bateman Charitable Trust
Clayton Utz
Colonial Foundation
Commonwealth Bank Foundation
Community Enterprise Foundation

The Dafydd Lewis Trust
The Danks Trust
Diana Elizabeth Browne Trust
Dymocks Literacy Foundation
Education Foundation
E B Myer Charitable Fund
Edward Corbould Charitable Distributions
Enid Irwin Charitable Trust
The Ern Hartley Foundation
Ernest Lonsdale Brown Trust
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The Feilman Foundation
The Flora & Frank Leith Charitable Trust
The Fogarty Foundation
Foundation for Rural & Regional Renewal
The Foundation for Young Australians
The F.R. Neville Smith Foundation
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The Gandel Charitable Trust
Geelong Community Foundation
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The Greater Melbourne Foundation of LordMayor's Charitable Trust
The Grosvenor Settlement
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The Miller Foundation
The Myer Foundation
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