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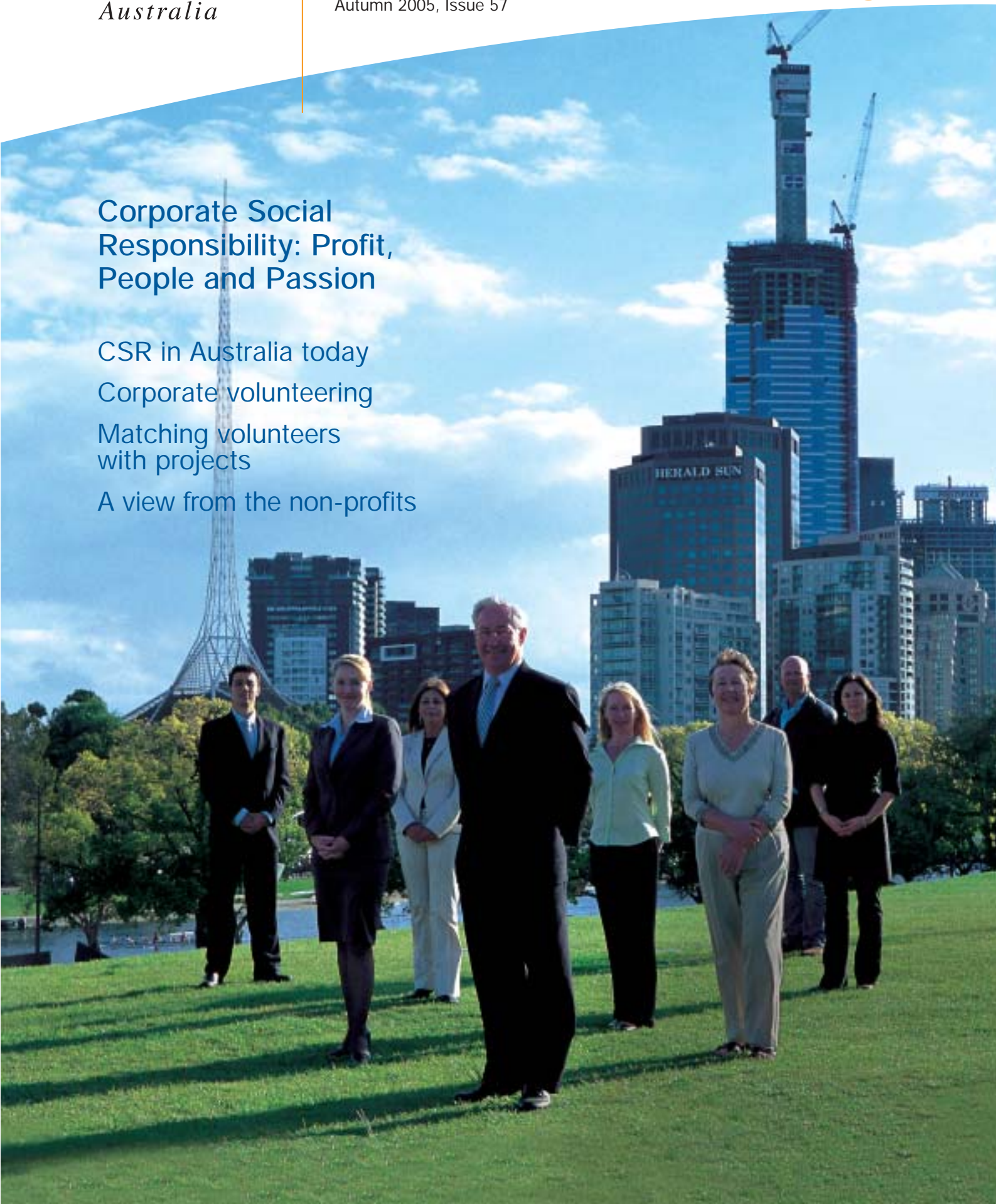
Corporate Social Responsibility: Profit, People and Passion

CSR in Australia today

Corporate volunteering

Matching volunteers
with projects

A view from the non-profits





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The Front Cover photograph shows: Des Blake, CEO for the Lord Mayor's Charitable Fund and others. From left to right: Grant Hooper – Philanthropy Australia Member Services, Kirsten Willcox – Mission Australia, Melina Smith – Lord Mayor's Charitable Fund, Veronica Pfalla – Interchange Northern Manager, David Glazebrook – Lighthouse Foundation General Manager, Anna Parfrey – Colliers International. See The Lord Mayor's Charitable Fund – building a culture of giving' on page 16. Photography by Charles Markel.

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Many would say that being a good corporate citizen actually contributes to more successful business.

From the President and National Director

From the President

Do companies have a responsibility to the communities they work in, beyond meeting their legal obligations, being efficient and being profitable? Many would argue that they do, and act accordingly. Many would say that being a good corporate citizen actually contributes to more successful business.

Corporate social responsibility (CSR), it is often pointed out, is very different from private philanthropy. Shareholders may well question the right of company directors to 'give away their money', however they would probably applaud considered decisions to invest in a community which in turn invests in their company and improves its long term performance. And modern day CSR is precisely about such investment.

Like any investment decision, good CSR requires thought, research, advice and consultation.

In this edition of Australian Philanthropy, we talked to some companies, large and not so large, about how they selected and committed to some very strategic projects and partnerships. We also talked to a couple of 'matchmakers', who helped bring profit-making and not-for-profit organisations together, as well as two of the larger charities who work with corporate volunteers. We look at different ways of making a difference, with business volunteering the prime focus.

It is true that CSR activities can sometimes be tokenistic, more about marketing than making a real difference.

However some of the examples on the following pages will help demonstrate the value of genuine and meaningful corporate commitment.

Lady Southey

From the National Director

Corporate Social Responsibility, or how modern corporations should relate to the communities in which they operate and make profit, is a contentious topic around the globe. There are many voices and many points of view. The Australian Shareholders' Association stands at one end of the spectrum, stating most recently during the tsunami tragedy that it is wrong, maybe even illegal, for corporations to give away shareholder's money. They would argue, as does investment guru Warren Buffett from Berkshire Hathaway, that corporations have only one stakeholder – the shareholder, and their key role is to maximise returns to shareholders.

At the other end of the spectrum stand prominent civil society organisations which advocate that all corporations introduce triple bottom line policies

Historically Australian businesses have had a very strong connection to the community, although they rarely declared themselves to be socially responsible. Reputable companies paid their staff reasonable wages. They employed young people in their first jobs, trained them and offered them secure employment, often for the duration of their working lives. They attended to their responsibilities as members of their communities as a matter of course.

Globalisation has dramatically changed these practices. Deregulation of wages and labour has meant that many companies must now focus on maximising profits, rather than investing in their often transient workforce, or playing a role in the community. Rather than having a natural community, many companies now just have markets and these often transcend regional and indeed national boundaries. We now live in a world in which, of the 100 largest economic entities, only 49 are nation states and 51 are global corporations. General Electric is wealthier than most European nations, while our own BHP Billiton is wealthier than Indonesia.

With this growth in power and resources, large corporations can make an enormous difference to the wellbeing of communities, for better or worse. The term 'corporate social responsibility' came into vogue as a way to encourage companies to consciously look at ways to re-engage with the communities they rely upon to sustain them. Research has helped, by showing that CSR is actually good for business.

In this issue of Australian Philanthropy, we highlight the energy and creativity of a few Australian companies in exploring this complex question of how the modern corporation fits into a rapidly changing community and world. Our aim is to showcase different models and help inspire others as they struggle to understand the new environment.

Elizabeth Cham

BHP Billitons' corporate social responsibility

By Nicole Crook, Community Programs Officer, BHP Billiton

BHP Billiton is the world's largest diversified resources company. We have 35,000 employees working in 100 operations in 20 countries.

Being active in local communities is just one plank of the company's CSR program. BHP Billiton is committed to spending one percent of pre-tax profits (on a three-year rolling average) on voluntary community programs through financial, in-kind support and human resources.

In 2000 we decided to look at options for an employee 'volunteer' program. To our surprise, our research indicated that many volunteer hours were already being donated by employees in their communities. Instead of providing an 8 or 16-hour block of 'work time' for employees to volunteer as some companies were doing, we decided to create a program to acknowledge the great contribution many of them were already making.

The BHP Billiton Matched Giving Program increases employees' personal community contributions by giving a matching dollar amount to the community organisation that employees support, either through volunteering, fundraising or cash donations. The program enables employees to influence how BHP Billiton makes donations and to help direct funds to areas of greatest community benefit.

Since the program commenced in 2002, over 300 non-profit organisations have benefited. More than 50,000 volunteer hours have been recorded in the first two years, and just over \$800,000 has been directed to not-for-profit community and charitable organisations by employees.

Through the volunteering efforts of Cheryl Lucas, an employee from QNI Nickel Refinery in North Queensland, a local school has benefited.

"I volunteered to cover about 800 books from the Belgian Gardens State School library. Most of the books were 15-20 years old and the plastic was yellow and cracking," said Cheryl. "The oldest book covered has been in use since 1964. The librarians have noticed since the books have been re-covered that there has been an increase in the usage and borrowing of the books," she said.

Through the Matched Giving Program, the School received \$1,000 on top of the 100 hours of time that Cheryl contributed. Junior sport coaching is a popular way for Australian employees to 'give back' to the community, however shift work can make it hard for some to make a regular commitment. PCYC in Queensland encourages BHP Billiton employees to form a coaching team of three – they take turns to coach the

employees Murray Wake and Terry Saunders. Murray and Terry spent over 250 hours lovingly restoring a heritage Hornsby oil engine from a former Central Highlands woolshed. As well as getting 100 hours each of their voluntary time, the Pioneer Village received \$2,000 through the Matched Giving Program.

The BHP Billiton Matched Giving Program currently operates in South

BHP Billiton is committed to spending one percent of pre-tax profits (on a three-year rolling average) on voluntary community programs through financial, in-kind support and human resources.

one team. The Matched Giving Program contributes funds to PCYC to match the coaching time the volunteers spend with the kids.

The Capella Pioneer Village (Queensland) has benefited twice over, thanks to the voluntary skills of Emerald locals and BHP Billiton Mitsubishi Alliance

Africa, Canada and the UK and was recently launched in corporate headquarters in Melbourne. The program will be rolled out globally over the coming years.

www.bhpbilliton.com/bb/sustainableDevelopment/community/supportGuidelines.jsp



Murray Wake and Terry Saunders with restored Hornsby oil engine.

The Body Shop: Every body's business

By Sally Edwards

Graeme Wise has headed up The Body Shop in Australia for 22 years, and has some strong views on corporate philanthropy.

Graeme Wise says that asking "What's in it for us?" is the wrong way to approach any opportunity. At best, he says "the profit imperative" is naive, simplistic and a sure way to miss the chance to make a real difference for all parties.

Company-sponsored voluntary work is not so unusual now but was virtually unheard of when The Body Shop began in Australia. Today they remain way out front when it comes to embedding the commitment in their corporate culture.

The Body Shop employs nearly 1,000 people in Australia and each one is entitled to the equivalent of two paid days of community work of their choice each year. Last year alone the company contributed over 7,200 hours of employee volunteer time with many employees contributing over and above this in their private time.

The range of projects Graeme mentions in a single breath is staggering: the team members from the Retail Support Centre who read local newspapers onto tape for the visually impaired; the warehouse team who plant trees; the administration staff who work with a social support program for people with eating disorders; the young man who runs the support crew for a bicycle tour for people with disabilities.

Graeme says that people really do want to contribute to their community through volunteering. "We just make it easy, and we help them see it as important and legitimate. We don't like the term 'work-life balance'. Work, home, community; it's all life."

Corporate philanthropy is often aimed directly at building external relationships, reputation enhancement and brand awareness. At The Body Shop, this would be seen as back-to-front. Their corporate philanthropy is not only low profile, but deliberately not focused on enhancing their reputation, keeping in the good books with stakeholders or getting the logo out and about. Far more important, says Graeme, is to simply look for ways "...where you can really help to create change and see where the path takes you."

The Body Shop started an Enterprise Development Workshop program for indigenous people from Australia and the South Pacific. They soon found themselves forming cross-sector partnerships with the Australian Federal Government and the United Nations. The program was so successful it has now taken on a life of its own as the First Australians Business venture.

Another example is their Retail Traineeship program for disadvantaged and homeless young people that linked with colleges of TAFE and the Brotherhood of St Lawrence. This program now provides opportunities for the children of refugees. Graeme says the results are already inspirational.

Where other sales-driven companies provide staff incentives such as cash, holidays or goods, The Body Shop struggled long and hard to find a manager's incentives program that matched the company values. Now, store managers are assessed on three equally rated performance criteria: profitability, stakeholder relationships

and community influence. The leading seven or eight managers each year are rewarded with the chance to participate in an annual trip to work with indigenous people somewhere in the South Pacific. They spend the time sharing business knowledge and skills with local people and inevitably come home enriched by the experience. "They feel so good about themselves; their life, their skill level and their ability to contribute. It helps all of us see ourselves differently."

"One of the most important things I have learnt over the past two decades is that corporate philanthropy does not need to involve a lot of money to be significant," says Graeme. "The welfare paradigm tends to offer little more than a 'band-aid' but real change is possible if you focus on creating economic generators. And this is what business does really well; starting, fine-tuning and running economic engines."

He is encouraged by the trend towards greater corporate awareness of, and responsibility for, their social impact but worries about what he calls 'profit imperative thinking'. He sees it as short-sighted and limiting, saying, "Profit is important but it is no reason to forget how you want the world to be."

"Sure, the company gains plenty of collateral benefit from our contributions outside the workplace: we feel good, we attract hard-working people who are nice to work with. We work together well and have a great workplace atmosphere, but most of all we bring our whole selves to work. At a time when work is playing a greater role in people's lives than ever before,

The Body Shop approach is to make sure that our work and our business are humanising forces."

Twenty-two years ago, Graeme Wise was negotiating to bring The Body Shop to Australia on behalf of a large national company. When the deal didn't come together, Wise took a deep breath, established a private company and took on the challenge himself. It meant not just importing products and procedures for the fast-paced world of retailing. It meant introducing a whole new business philosophy to the shopping malls of a nation. In Europe, The Body Shop was synonymous with the ethics and activism of its founder, Anita Roddick. The Body Shop simply would not be The Body Shop unless it behaved as if business can be a force for good. So, long before the phrase 'corporate social responsibility' starting appearing in annual reports, Wise had to find a way to create a corporate-culture-with-a-conscience in the generally laid-back and non-activist Australian business sector. That must have been a very deep breath indeed.

www.thebodyshop.com.au/infopage.cfm?topicID=12

The Body Shop contributed over 7,200 hours of employee volunteer time with many employees contributing over and above this in their private time.



Right: Leonie Kaghin reading the newspaper for The Body Shop's Reading for the Blind program (photographer Charles Markel).

Foster's jumps into relief action

By Robyn Vale

The Foster's Group created the Foster's Community program in November last year. The scale of its first project could not have been predicted.

Whilst Foster's Group has some history of giving, it has not, until now, been very coordinated in its approach. Scott Delzoppo's position of Community Relations Manager was created to develop a community program with a good 'fit' to the company.



A Foster's Group volunteer labels cans of VB to encourage public donations.

On Boxing Day, the tsunami rolled across the coasts of Asia. Foster's Group CEO Trevor OHoy and Carlton & United Beverages Managing Director John Murphy saw it as a priority to respond immediately. They asked newly appointed Community Relations Manager Scott Delzoppo to coordinate a company-wide response.

An immediate cash contribution was made to CARE Australia and the Red Cross. Four days later, Foster's Group employees across the world were advised by email or text message that the company was developing an ongoing response. A regular disaster relief update was sent in this way from then on.

A project team was established drawing on the operations, human resources and marketing departments. After additional cash donations to four aid agencies, the project team decided that their most effective contribution could be to encourage public donations.

A community service announcement was delivered via the packaging of the Group's most popular products. Every carton of Victoria Bitter beer; selected bottles of Wolf Blass wine; and every bottle of Torquay Water would encourage customers to contribute to tsunami relief through one of the aid agencies. Given that packaging is usually designed and produced months in advance, this was an ambitious plan.

Nevertheless, within one week of the first email to staff, the project team had coordinated the design, production and delivery of labels across Australia, from Altona in Melbourne to outback warehouses in the Northern Territory. The labels were applied over the following week by 500 volunteers from all levels of the company. Their labour was supported by contractors who work

in Foster's Group warehouses – forklift drivers, for example – who also donated their time and skills.

The Monday following the national volunteer labelling effort, more labels were applied in-store by visiting sales people with a helper each.

The Foster's team based in Dubai donated cartons of blankets, clothes, utensils, toys and other personal items, sent free of charge by a courier company. Part of the proceeds from each wine case sold by Foster's New Zealand was donated to the Red Cross. A European arm of Foster's in the Netherlands made a cash donation and coordinated other staff efforts.

The Foster's Group also supported the international cricket match: Australia versus The World. All the beer (and everything else sold on the day) was donated, maximising the cash raised by the event for World Vision.

Foster's Group made straight cash donations totalling \$1 million to five aid agencies.

Whilst Foster's Group has some history of giving, it has not, until now, been very coordinated in its approach. Scott Delzoppo's position of Community Relations Manager was created to develop a community program with a good 'fit' to the company.

The tsunami forced a quick response, and Scott had to hit the ground running. It is now clear that Foster's Group has the resources and the will at all levels of the company to deliver comprehensive programs. The challenge for the future will be to identify the right targets for their efforts.

www.fosters.com.au

Hewlett Packard: changing direction can make a real difference

By Sally Edwards

With a long history of philanthropy, Hewlett Packard took a step back to review their giving and find a way to make it really count. They have now embarked on a new approach to partnerships and are making sure they get it right from the beginning.

When Greg Healy took over as Director of Corporate and Enterprise Marketing at Hewlett Packard (HP), it was after a complicated merger process which left their philanthropy at risk of being disjointed and directionless. The time was clearly right for HP to reassess their philanthropy in Australia.

Healy and his team found a myriad of contributions, all driven by the 'feel-good' factor – the corporation's desire to say 'yes' to as many causes as possible. Realising that philanthropy should be only one part of a corporation's overall citizenship role, they came to two conclusions. Firstly, invest in just one or two significant, long-term partnerships. Secondly, think beyond dollars and find ways that HP's culture and competencies can add value.

Thus began an exhaustive process to find the right partners. First they formed an in-house Philanthropic Board with members of the Country Senior Leadership Team and four other up-and-coming staff. With HP's goals of fostering e-education and promoting global inclusion, it became clear that the Board should look for partnership projects in e-education. This values-based approach to philanthropy tapped into the way HP sees the world and its overall contribution: if our business is about making things possible through technology – so our philanthropy should be, too.

HP sought Philanthropy Australia's help in developing a brief for the selection process. Realising the value of independent and objective advice, they commissioned consultant Adam Blake to scope and review the possibilities. A short list of organisations was invited to make presentations to the Board. From this, two partnerships have begun; one built on the foundations of HP's 10-year relationship with the Starlight Foundation, and one entirely new partnership with the Inspire Foundation.

Since then, HP has been doing a lot of listening and talking with both Starlight and Inspire. Healy believes the best chance of the partnerships lasting and evolving, is to get that communication right to start with. "We want these partnerships to be 'best in class'," he says, "so we have a steering team for each partnership and spend a lot of time discussing the principles, procedures and the purpose. We carefully map it all out together."

The Inspire Foundation's Jack Heath, agrees, adding "You have to be really clear and open with each other – especially about the goal. This case was refreshing because HP did not approach partnering with us as a marketing exercise. From the outset, they were very committed to helping provide technology access to young people who otherwise would not have it."

The HP-Inspire partnership is still in its infancy, but the early signs auger well; 18 Bean Bag Centres are now up and running around the nation to provide technology access for disadvantaged young people. Establishing these centres has been much more than just providing 'any-old' hardware. HP and Inspire have worked closely to create a welcoming environment designed specifically for the young people themselves. HP Product Managers, for example, have customised packages that offer the best possible level of 'utility' for the young people at each centre.

Jack Heath says what excites him most about the partnership with HP is that "...both parties are approaching the partnership asking, "Where can we add value?". This is already having results with the Inspire Foundation benefiting from links with several of HP's business partners who are also happy to contribute. For example, HP has existing technology-development partnerships

"...at Hewlett Packard we can say 'no' with a good conscience because we are really clear about how best to say 'yes'. We're very proud of that."

with both the Sydney Opera House and Formula One racing car company Williams. HP helped both these organisations recently join forces to offer participants in Inspire's Youth Ambassadors program a chance to work with leading Formula One driver Mark Weber on developing life and leadership skills. "Working together on a philanthropic partnership is a great way to strengthen a commercial partnership," says Healy.

Greg Healy says, "There are so many good causes. Your natural instinct is to give to everyone but that's not the best way to contribute. Being reactive takes so much time and it can be very difficult to say 'no' if you are not clear about what you are doing or why. Now at Hewlett Packard we can say 'no' with a good conscience because we are really clear about how best to say 'yes'. We're very proud of that."

www.hp.com.au

Modern philanthropy, Macquarie-style

By Sally Edwards

The Macquarie Bank Foundation reflects the performance-focused culture of a high-achieving investment bank.

This helps contribute to a collective sense of pride in a generally individualistic environment. Recent research shows that 78-80 percent of staff are proud of Macquarie's role in the community – quite an achievement for a global investment bank.

The Foundation dates back to 1969 and its precursor, the Hill Samuel Charitable Trust. For over 30 years, it has donated a fixed percentage of the bank's annual staff profit pool to various charitable organisations. Over that time, the name has changed and, as the bank's profits have grown, the level of philanthropy has continually increased. In 2000, the Foundation embarked on a review to determine how best to connect with their unique organisational culture, and how to maximise community benefits from their efforts.

Foundation manager Julie White and her small team have been hard at work ever since, particularly on developing ways to encourage engagement with Macquarie's staff. Julie says that one of their challenges was to support employees in their voluntary work in a way that was sustainable given the rapid-fire, high-stakes world of investment banking. "The nature of the business we are in means that there are times when downing tools and going to do community service is just not an option."

Rather than a formal or prescriptive approach, the bank now has a range of initiatives in place specifically designed to work within the nature of their business and align with their culture of encouraging independence and rewarding initiative.

"Our management practice is what we call 'loose-tight'. It's a 'tough love' environment where rewards arrive according to your success," says Julie.

Macquarie Volunteering is one of these programs. It includes specially developed intranet resources to help staff be more aware of the opportunities and benefits of volunteering, promote communication between people inside Macquarie about being a volunteer and to link staff directly with organisations or projects which need their help.

Another new initiative is the Staff Participation Policy, to acknowledge and encourage employees who have demonstrated a serious commitment charitable work. Where an employee serves as an executive in a not-for-profit organisation, the organisation becomes eligible for a \$3,000 grant direct from the Foundation.

Leading the encouragement-and-reward approach, however, is Macquarie's new global Volunteer of the Year awards program. Staff in all Macquarie's offices (across 23 countries) are invited to nominate themselves or others. The incentive is cash prizes – not for the employees but rather for the organisations with which they volunteer. There are two winning grants of \$10,000 and several commendation grants of \$2,000. Among this year's winners are a disabled sailing program in Perth and a mentor program for marginalised young girls in London.

Julie says there are many benefits to this program, not least of all its capacity to discover the stories of what Macquarie employees are doing in their local communities and sharing those

worldwide. This helps contribute to a collective sense of pride in a generally individualistic environment. Recent research shows that 78-80 percent of staff are proud of Macquarie's role in the community – quite an achievement for a global investment bank.

Macquarie have also introduced a system to help staff contribute regularly to any cause of their choice, direct from their salary. Participation in this scheme grows steadily each year. Alongside this is the Foundation's Staff Donation Support Policy under which staff who donate or raise funds for a charitable organisation are eligible for a supporting donation from the Foundation "It's not strictly a donation matching policy," says Julie. "We are committed to following the initiative of our staff on this but we also want to make sure the funds are shared around so we have a \$50,000 cap per staff member or per organisation."

Overall, it is very much an approach that allows individual staff members and teams to take the lead in the direction of the bank's corporate philanthropy. It was put to the test with the bank's recent tsunami appeal. Macquarie kicked things off with an initial donation of \$100,000 to the Red Cross, with a

commitment to match staff donations thereafter. An impressive 1,800 members of staff have donated more than \$760,000 to over 30 relief organisations and the bank matched them every time. This means that, as a whole, Macquarie Bank has already donated over \$1.6 million to the tsunami appeal.

After more than 30 years, the traditional policy of distributing a fixed-percentage of the staff profit pool each year remains a central tenet of the Foundation. It is still led by the bank's longtime leader, Executive Chair David Clarke who is well known for his commitment to the principle that business should contribute to the communities in which it operates.

Strong growth in profits has meant much more funds coming through the Foundation. Its annual donation budget has increased manyfold in the last few years, to around \$3.5 million in 2004, so Julie White's three person team has a bigger job on its hands every year. "It's hard work to do well, but incredibly exciting. There are amazing people inside Macquarie already doing amazing things. We help them do even more."

www.macquarie.com.au/au/about_macquarie/macquarie_in_the_community.htm

The incentive is cash prizes – not for the employees but rather for the organisations with which they volunteer.

More than 170 Westpac staff have spent time in Cape York on secondment to work on business, finance and educational projects...



A group of volunteers sitting on steps wearing Westpac caps.

Westpac: creating a culture of community involvement

By Killara Ulm, Community Involvement, Westpac Banking Corporation

Giving employees the opportunity to support the community groups they feel passionate about has been key to creating a culture of community involvement at Westpac. Head of Community Involvement Samantha Brown says her team's role is all about making it as easy as possible for employees to get involved, and finding new ways to connect people throughout the bank with a diverse group of community organisations.

Westpac has a strong tradition of community involvement and a number of longstanding community partnerships. The bank's associations with Westpac Life Saver Rescue Helicopter Services in New South Wales and The Salvation Army, for example, span more than 30 years. Over the past decade, however, Westpac has experienced an evolution in its approach, moving from ad hoc funding to a strategic framework for community investment. It now focuses resources on three main areas: staff involvement, community partnerships and capacity-building.

Supporting staff choice

Westpac's staff involvement program centres around enabling their workforce to support the community groups of their choice. The bank's Matching Gifts program, for example, matches staff donations, dollar for dollar, to any tax-deductible charity in Australia. In March this year Westpac matched a record amount of \$1.25 million donated by staff to around 310 charities, which included a substantial contribution to tsunami appeals. This brings the total amount generated since the program began in 1999 to more than \$9.2 million for around 805 charities.

Westpac staff are also entitled to a day's paid Community Leave each year to do volunteer work for any not-for-profit organisation. Last year more than 3,600 days of Community Leave were recorded, a conservative figure says Brown, as many staff also donate their time and expertise through mentoring and pro bono projects.

Building financial independence in Cape York

Westpac's involvement with the Indigenous communities of Cape York is one way the bank is using its intellectual capital to create tangible social benefits. The bank recently committed to a second three-year term of support for Indigenous Enterprise Partnerships (IEP) at a board level, as well as on the ground through an extensive skills-transfer program.

"From what our people tell us, it is one of the most personally rewarding experiences we can provide them. Many go with the hope of giving something worthwhile and tangible to the communities they work with, but they come back having learnt so much more," Brown said.

Mutual rewards through mentoring

Westpac staff can also use their professional knowledge through the company's partnership with Young Achievement Australia (YAA), a business skills program for high school and tertiary students. Westpac provides fee-free banking to the companies set up by students through the program, as well as mentors and advisors to student groups.

Westpac employees get to help students learn how to run a business while developing their own leadership skills. The program runs for 24 weeks and involves weekly meetings with students to explore typical business scenarios, including marketing, finance, production, human resources and management.

Rolling the sleeves up

One of the most popular staff involvement programs at Westpac is Operation Backyard, an environmental funding program. Westpac has partnered with Landcare Australia to administer the program, which provides funding for materials on projects which solve

Staff from Westpac's Southport branch in Queensland, for example, have spent a couple of hours on Sunday mornings, every six weeks, over the past five years, to rejuvenate the local Glenmore Park.

Partnering for joint value

Westpac has partnerships with Mission Australia, the Juvenile Diabetes Research Foundation, the Australian Mathematics Trust, The Smith Family, Surf Life Saving in Queensland and Life Saving Victoria; all of which provide a wide range of opportunities for staff to support different causes.

"Working in partnership ensures that our approach to community involvement is grounded. Our approach is – how can we best use our resources, expertise and networks to add real value to our community partners, and in turn, have a positive impact on the community in general," says Brown.

Creating capacity

Capacity-building is the final plank in Westpac's Community Involvement strategy. This program provides community groups with specialised training and tools to improve their performance.

Other initiatives include access to Westpac's popular Beyond Survival small business course, and its free Guide for Community Treasurers.

Westpac's approach to community involvement and investment is reported each year, along with other corporate responsibility practices, in the bank's Stakeholder Impact Report. The external recognition Westpac has received indicates it is on the right track. Last year, it was ranked number one against Australia's top 100 companies in the Reputex Social Responsibility Ratings, and this year, for the third year in a row, was number one in the global banking sector of the Dow Jones Sustainability Index.

www.westpac.com.au

Westpac's involvement with the Indigenous communities of Cape York is one way the bank is using its intellectual capital to create tangible social benefits.

More than 170 Westpac staff have spent time in Cape York on secondment to work on business, finance and educational projects, such as the Family Income Management Scheme, which helps families better manage small incomes; and Business Facilitation, to help Indigenous business ventures get up and running.

environmental issues, such as preventing erosion or encouraging biodiversity. Since the program began in 1998, more than \$963,000 has been provided to more than 228 projects chosen by Westpac staff. Many teams have used the program as an opportunity to not only improve their local environment, but to get together on a regular basis.



Austway Vending: A sweet deal

By Carole Fabian

Many a working Australian has beaten the afternoon blues with a sugar hit from a lolly vending machine. With the help of Austway Vending, this guilty indulgence can actually help a number of good causes.

Austway Vending began life in Adelaide in 1996, selling snacks, drinks and confectionery vending machines. In recent years, it has expanded to every major Australian city, as well as Auckland. The company now employs 35 people, and has over 500 operators, 60 who are involved in the lolly machine network.

Austway Vending supplies dedicated lolly machines to raise money for the company's charity partners, the largest of which is the Australian Red Cross. Funds come from licence fees which owner/operators pay for the machines.

The lolly machines are a good example of cause-related marketing, helping operators promote their brand name and goodwill, as well as generating support for charity. Already the machines have generated a substantial \$80,000 for the company's not-for-profit partners.

Austway Vending demonstrates well how a small to medium business can make its mark by supporting community causes. As the company's Philanthropy Manager, Rikki Andrews explained, "Philanthropy is not an add-on, it's a core part of our business. We factor it into our day to day work."

"When we ask a business to host one of our machines, we are asking them to support the Red Cross or one of our other charity partners. It's good for our brand, and it's good for the partners," she said.

The growth of Austway Vending meant that the philanthropy side of things required a dedicated coordinator. Rikki Andrews, who had been working in the accounts section of the company already, volunteered to take on the role

Austway Vending demonstrates well how a small to medium business can make its mark by supporting community causes. "Philanthropy is not an add-on, it's a core part of our business. We factor it into our day to day work."

as something she had long been interested in.

As well as the Australian Red Cross, Austway's charity partners include Autism Victoria, Autism South Australia, Children's Leukaemia and Cancer Foundation in Western Australia, Surf Lifesaving in Western Australia and New South Wales, Uncle Bob's Club (associated with the Royal Children's Hospital) in Victoria, and Barnados New Zealand.

Owner/operators are welcome to have input into which charities benefit from the licence fees.

"As we get larger, we get some of the newer operators coming to us with suggestions, especially when they have a personal interest in a particular cause or charity," Rikki said.

The idea of vending machine fundraising came from the American market, where it has been entrenched for more than 15 years.

"In America, they're at the point where various charities actually advertise in the vending machine trade journals. Here, I still have to go to the charities and encourage them to let us contribute," Rikki said.

As well as promoting the idea to partners and potential charities, Austway continues to bring their network of operators on side.

"We encourage our people to be more active and find out about the charity partners and what they do, and we've had a couple of charity partners come to our seminars and talk about their work," said Rikki.

So next time you get the munchies at work, keep an eye out for an Austway Vending fundraising machine. As the company motto goes, "Every handful helps!"

http://austway.com/comm_over.asp

Left: Rikki Andrews, Philanthropy Manager of Austway Vending with three vending machines (photographer Charles Markel).

Telstra Foundation – a key part of Telstra's community engagement

By Fiona Moore, National Manager, Telstra Foundation

Companies are increasingly expected to perform additional functions in the community, including meeting obligations of good corporate citizenship and social responsibility.

There is strong evidence that companies which are seen as good corporate citizens perform better than those which ignore that role. A good corporate citizen is more likely to be an employer of choice, a company that people like, want to purchase from and to invest in.

Charles Forbrum said "Reputation is about what the company stands for and how it behaves." Corporate Social Responsibility (CSR) is not an 'add on' and will never make up for poor service or products. It is about long term sustainability, not a short term boost to competitiveness.

Genuine CSR deepens a company's engagement with the community, reflects and responds to community values, expectations and needs, and prevents insular thinking. Therefore, CSR can be a slow process and involves cultural change.

Telstra is a company which touches the lives of most Australians. Its stakeholders include shareholders, government, customers, employees, suppliers, the media, and the general public. It follows then, that Telstra's CSR activities are wide ranging and impact on communities across Australia.

Telstra has a history of community involvement and nation building. Today's CSR activities build on this tradition in a contemporary context. Telstra ranked seventh overall and third in 'community' in the 2004 Australian Corporate Social Responsibility Index.

Accountability and evaluation are integral to all stages of operation. While it's often hard to measure results, especially in areas where there are no quick fixes or easy solutions to problems, it is important to demonstrate the social return on financial investment.



Left to right: Telstra Foundation Chairman Herb Elliott AC MBE, Matt Pfahlert, Geraldine Doogue AO, Bill Scales AO, Fiona Moore (National Manager), Jackie Huggins AM, Fiona Stanley AC (since left the Board), Ross Baxter. Telstra CEO Dr Ziggy Switkowski was not present when the photo was taken. Professor Louise Baur has now joined the Board.



Chairman of the Telstra Foundation, Herb Elliott, with children involved in the 'Fresh Kids' childhood obesity program in Melbourne's western suburbs.

Some of Telstra's CSR programs include:

- Telstra Friends (Australia's largest corporate volunteer program)
- Community sponsorships (including Telstra ChildFlight, Lifeline, Victor Chang Research Institute, Royal Flying Doctor Service, Sydney Cancer Centre, Telstra Centre for Burns Reconstruction and Rehabilitation, on Trac @ Peter Mac youth cancer support, Surf Life Saving)
- Disaster and crisis relief – floods, fires, East Timor, Bali bombings
- Access for Everyone – low income support
- Disability products and programs
- Environment – sponsorships, 'green office', 'green fleet', recycling, energy savings
- Local rural sponsorships through Telstra CountryWide
- Sponsorships of both elite and community sport
- Industry development and leadership – business awards, Broadband Fund, Drivesafe

The Telstra Foundation is a key component of Telstra's wide platform of community engagement and CSR. The Foundation, launched in 2002, is independent of the commercial interests of the company.

The Foundation manages the Community Development Fund (which makes larger grants to projects run by community organisations), and the Telstra Kids Fund (which makes smaller grants to staff nominated, local community groups and activities involving Telstra families).

The Community Development Fund seeks to improve the health, wellbeing and life chances of Australian children and young people. Priority areas include early childhood development, childhood obesity, Aboriginal and Torres Strait Islander community development, and support for gifted and talented kids.

Telstra's Kids Fund aims to encourage active participation of young Australians in healthy activities and local community groups. It supports Telstra staff, their families and local communities, and supports the ethos of volunteering and community engagement of Telstra and Telstra people.

Accountability and evaluation are integral to all stages of operation. While it's often hard to measure results, especially in areas where there are no quick fixes or easy solutions to problems, it is important to demonstrate the social return on financial investment, and ensure that Telstra shareholders' funds are used well and to maximum impact.

Stakeholder research in 2004 showed that there is a very high level of satisfaction with the Telstra Foundation, both among Telstra staff and community groups it has come into contact with.

Telstra's CSR Report, Environmental Report and Customer Service Charter are available on Telstra's website: www.telstra.com

Telstra Foundation funding guidelines, online application forms and full listing of funded projects available at: www.telstrafoundation.com Telephone 1800 208 378

The Lord Mayor's Charitable Fund – building a culture of giving

By Carole Fabian

There are three things that bother Des Blake – tokenism in corporate giving; charities who think they are businesses; and businesses who think they are charities.

The CEO of Melbourne's Lord Mayor's Charitable Fund has observed all three, but more often he's impressed by the value of genuine corporate generosity.

The Lord Mayor's Charitable Fund works with both the corporate and charitable sectors in Melbourne, and nationally through United Way, to facilitate partnerships through workplace giving, employee volunteering and other programs.

"We sit neatly between the two and we speak the language of both," Mr Blake said. "They often don't understand each other, and that's where we can help.

Tokenism is a problem when companies want to 'do CSR' because its fashionable, or perceived as a short term boost to business. At its worst, according to Des Blake, it can lead to people and charities being treated as commodities.

"Occasionally we have a company ring us up and say 'we want a team building exercise – can you find us a charity?'" he said. In his view, this is going about things the wrong way round.

"For CSR to be truly effective, it has to be sustainable," he explained. "To be sustainable, it has to be personal, not merely another company 'operation'. A lot of our work, therefore is about creating the right culture – so that there is a natural fit between people engaging with the community, but doing it through their company."

According to Des Blake, staff motivation and whether it is matched by company values are the keys to successful corporate social responsibility.

Des Blake says that corporate giving is at least as old as the Lord Mayor's Charitable Fund itself. The LMCF was founded in 1923, and its earliest annual reports include long lists of local large and small businesses who gave to the community, including through workplace giving programs.

These days, the LMCF works with a range of companies, and helps to support some 200 charities, including many small organisations that don't have a high profile or many resources.

One of its programs is ExxonMobil's volunteering day, when 284 employees work with twenty different not-for-profit organisations. Some volunteers pack boxes of toys, others paint and repair residential houses for young people with disabilities. Des Blake is moved by the way the experience energised the volunteers through personal contact.

"You could get the same work done with a cheque, but that doesn't account for the intangible benefits of volunteering," he said.

"Being there at the frontline of what charities do can make a real difference. For some professionals, this might be the only contact they have with people of severe disadvantage or those whose lifework is their care. They experience it, they remember it, and they'll talk to others about it. That's the personal dimension that helps deliver sustainability."

On the other side of the coin, LMCF plays an important role in assisting charities and community groups to make the best use of corporate support, especially volunteers.

"Very few charities have the operational model to be able to take volunteers on their own," Mr Blake said.

A lot of work goes into establishing a successful and effective volunteering program. Identifying community needs, matching them with appropriate people and skills, properly briefing (and debriefing) volunteers, and attending to basic logistics such as ensuring the right tools and equipment are available, are all necessary to make the exercise genuinely beneficial for everybody.

And his other two bugbears? Des Blake thinks that the business and not-for-profit sectors have much to learn from each

"They experience it, they remember it, and they'll talk to others about it. That's the personal dimension that helps deliver sustainability."

other, but he worries when they think they're fundamentally the same kind of operation, and act accordingly.

"Business optimises through competition, and if they're successful they grow. Charities, on the other hand, should be collaborating, not competing. Their core purpose is to service a need society would rather not have, and if possible to eradicate that need. Their success measured by their disappearance. The operating paradigm that defines a successful business is almost completely opposite that of a successful charity."

"It's important that charities aim to become better organised, more efficient and well administered. But they shouldn't be trying to become more 'business-like'!"

"And businesses can learn the importance of values and passion from the not-for-profit sector. But they should ultimately be focussed on being successful at business. If they are motivated by enlightened self interest to contribute to and support their community, then that's as it should be".

The Lord Mayor's Charitable Fund is a member of United Way.

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www.lordmayorsfund.org.au

Keeping goodcompany

By Justin McMurray of goodcompany

goodcompany is a progressive not-for-profit group helping to inspire young professionals into pro bono work.



With such success in the 'young' professional market, it is no surprise that goodcompany recently helped launch a pilot of greatcompany, an initiative aimed at helping 'older' professionals get involved in the community.

While most charities focus on fundraising, goodcompany's founder realised many people prefer to help others by providing their professional services. With the aim of inspiring, educating and linking professionals with suitable charities, goodcompany was piloted in Melbourne in 1999. Its instant success highlighted the gap in the market.

"goodcompany has been embraced by charities and 25-40 year old professionals from day one," goodcompany founder Kate Kennedy said.

"Since formal operations began in 2001, we have registered more than 3,500 young professional members in Melbourne and Sydney assisting more than 330 not-for-profit groups. In that time we estimate we have facilitated more than \$4.5 million worth of pro bono services to the community." CEO Emma Vibert said the goodcompany model was expressly designed to suit the fast-paced lifestyle of young professionals.

"We're offering one-off professional projects as requested by our not-for-profit groups. Of course, if they prefer a longer time involvement with a charity, that's fantastic. But that's totally up to them."

goodcompany's innovative model relies on web, email and targeted events. For every \$1 spent on operations, goodcompany's model delivers an estimated \$8 in market value at the not-for-profit end.

With such success in the 'young' professional market, it is no surprise that goodcompany recently helped launch a pilot of greatcompany, an initiative aimed at helping 'older' professionals get involved in the community. Championed by Lynne Landy (spouse of Victorian Governor, John Landy) and launched at Government House on 9 March by the Victorian Deputy Premier John Thwaites, it is expected that greatcompany will quickly follow in the successful footsteps of goodcompany.

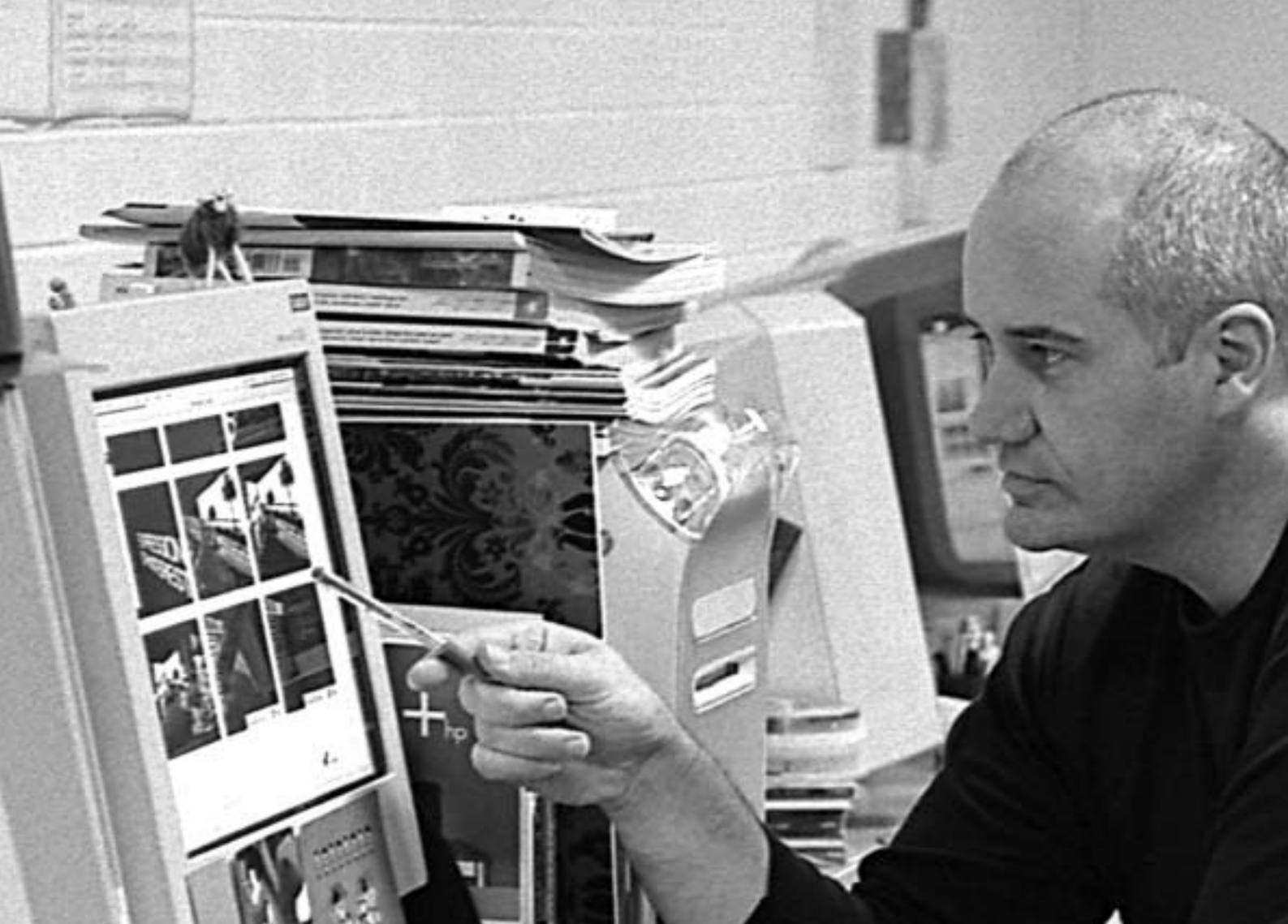
Ms Vibert said goodcompany was also continuing to innovate within its existing program. Plans are already underway to trial and roll-out an employee volunteering program in response to more corporations keen to realise the benefits of a strong focus on corporate social responsibility.

By applying its experience in connecting the corporate and social sectors, goodcompany hopes to provide an effective service for companies eager to help get their employees involved in the community.

"Companies are recognising skill-based volunteering is a powerful way to develop their people and also deliver a high-impact to the community," Ms Vibert said.

In the long term, goodcompany hopes its move into the corporate market will enable it to become financially self-sufficient, especially given volunteers and community groups are not charged to use goodcompany's services. In the short term, goodcompany is seeking partnerships and support to help develop the necessary infrastructure for these initiatives and its future growth.

For organisations interested in supporting goodcompany's work or for companies to register their interest in employee volunteering programs, contact Emma Vibert on (03) 9603 3533 or emma@goodcompany.com.au www.goodcompany.com.au



David Gorman and staff (photographer Charles Markel).

Two goodcompany success stories

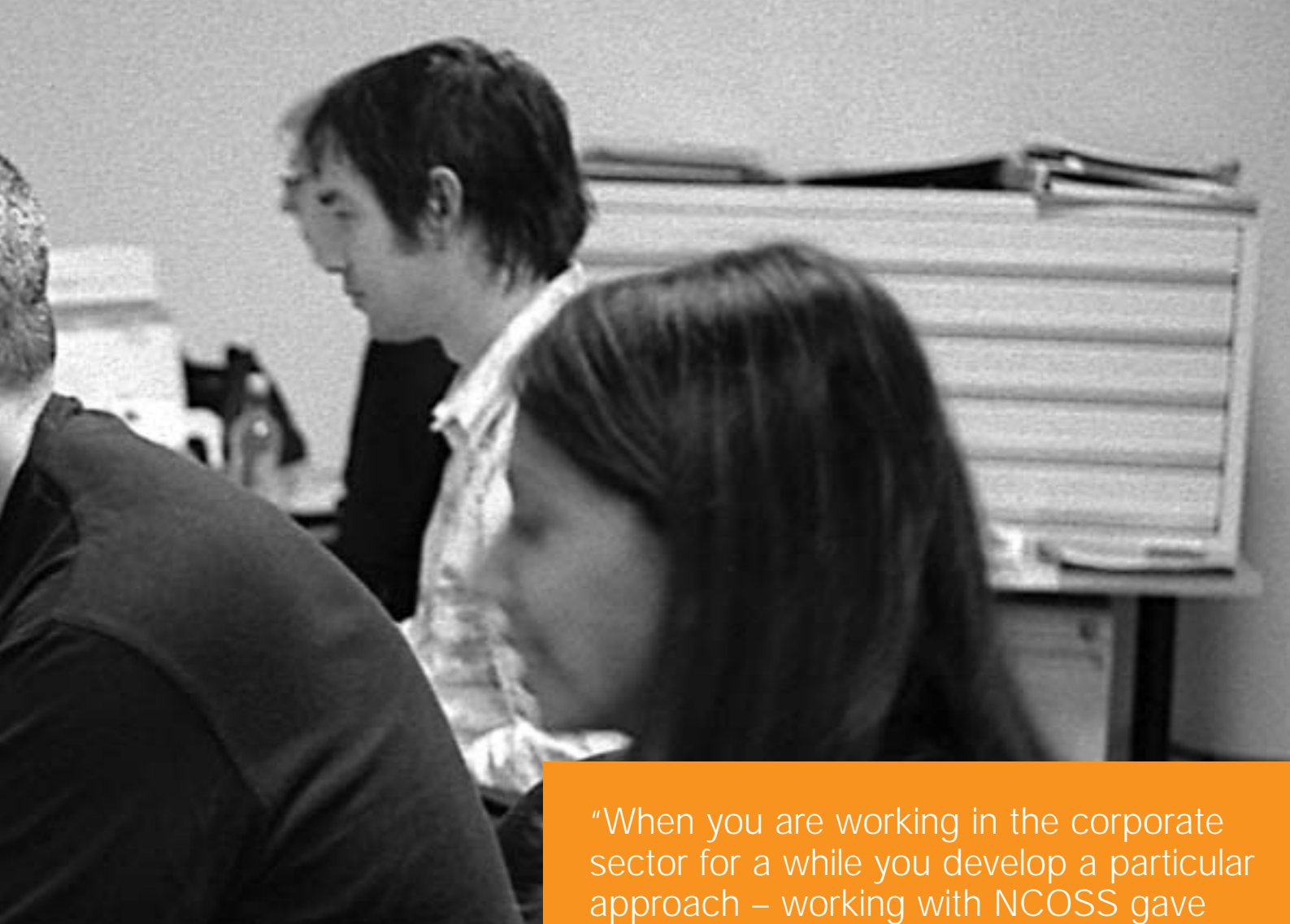
By Robyn Vale

The benefits of volunteering may seem fairly obvious, but it may surprise you to learn that there are professional advantages for volunteers as well.

Two very different professionals, matched by goodcompany to respective organisations, have found a chance to develop new skills in their working lives.

Matthew Nunan, a financial analyst with Lion Nathan, and David Gorman, owner and creative director of Digital Dogma, were matched by goodcompany with organisations in need of their skills.

Matthew had that nagging feeling familiar to many of us of 'wanting to make a contribution'. Matthew attended a goodcompany event and linked up with NCSS, the National Council for Social Services.



"When you are working in the corporate sector for a while you develop a particular approach – working with NCOSS gave me some fresh thinking on how to tackle problems."

NCOSS had an idea that by purchasing together, their members could develop cost saving efficiencies. Matthew assisted them to achieve this aim, by making suggestions, writing a paper and bouncing back ideas as the program was implemented.

Matthew believes he gained the experience of working in a more consultative style. "When you are working in the corporate sector for a while you develop a particular approach – working with NCOSS gave me some fresh thinking on how to tackle problems."

Matthew is keen to put his hand up again, as it was a "great learning experience," and he enjoyed it.

Digital Dogma is a St Kilda based company that delivers strategic marketing advice, graphic design and production. Directors David Gorman and Kate Forster have developed a business philosophy that 'It's good to give back'.

As Digital Dogma shares a building with the Sacred Heart Mission, it was a natural place to start. Through Sacred Heart, they met goodcompany, about four years ago. Since then, they've worked with the Prahran Mission, Good Shepherd and most recently, the Mental Illness Fellowship.

This, said David, has been the biggest and most successful project they've been involved in. With a small budget provided by the Mental Illness Fellowship to cover outsourced production costs, and the strategic development and creative skills donated by Digital Dogma, a national campaign to demystify mental illness was researched, conceived, produced and finally launched late last year. It consisted of a television commercial and radio spots customised for each state, and a series of poster and press ads. David and Kate secured the services of Eric Bana to do the voice overs.

"Being able to bring our networks to the benefit of the organisation we're working for is very satisfying," said David.

And what did David, Kate and their company – with a staff of seven plus freelancers – get out of it?

"The main thing is that we really believed in it and we really enjoyed it... a sense of community comes out of it," said David.

"We've been able to instill in our staff the idea of giving back... The team gets to be a lot more creative on these sorts of projects than we can on projects for the corporate sector... We get to try out all the cool stuff the corporates won't let us!"

www.goodcompany.com.au

A view from the not-for-profits: bringing companies and communities together

By Geoffrey Winn

Volunteerism is a characteristic feature of Australian community life and a linchpin of our civil society. Increasingly, companies are enabling employees to volunteer their time and skills in the non-profit sector.

Simon Wright, Corporate Partnerships Manager for The Smith Family, prefers the terms 'community engagement' or 'community investment' to 'corporate social responsibility'.

"It better reflects the sense of intimacy that's created in the relationship between the volunteers and the community."

Anna Taperell, National Volunteering Manager of Mission Australia's Corporate and Community Partnerships Department, agrees. "It emphasises the human element of volunteering that builds social cohesion, prevents community isolation, and creates links and understanding within our society."

For the non-profits, the benefits of corporate volunteerism are obvious, from added resources and social capital to technical and management skills.

"We value our corporate volunteers, tapping into professional skills, networks, and drawing on the resources of the wider community for the benefit of people in need," says Taperell.

Though less apparent, the benefits for the companies are nevertheless compelling. They report higher staff retention rates built upon greater employee commitment and pride in their companies, and the enhanced brand image that attracts customers who reckon social responsibility into their buying decisions. Taperell cites statistics to suggest that corporate volunteerism impacts on profitability, worker satisfaction and company morale.

Volunteers at The Smith Family report gains in skills that are marketable in the workplace. "Especially in the mentor programs," Wright says, "the volunteer's

"It's important to educate companies that while a non-profit is always extremely grateful at the prospect of hands-on assistance, the fact is that it may take months of planning, expenditure and organisation to facilitate such a large scale effort."



motivation and sense of excitement really shines through." He has no doubts that good corporate citizenship benefits shareholders in the long term, and research conducted by one of The Smith Family's long-term corporate sponsors, AMP, bears this out.

For some volunteers, it is a way to improve their interaction with customers and gain a more worldly view. For others it provides a personal and human insight into some of the social problems they previously may have only read about.

Companies can expect to draw on the considerable expertise of the non-profits. "We understand that ongoing relationship management aids retention and longer term commitment of volunteers," says Anna Taperell. "We work hard to ensure volunteers are appropriately inducted and briefed about the organisation and its activities, as well as OHS and insurance issues."

So what experiences can companies expect for their volunteers in the non-profit sector? In Mission Australia's Team Challenge program employees are confronted with a challenge and work together to resolve it. In one instance, 50 Vodafone employees, supported by funding from the Vodafone Australian Foundation, helped set up the Drummoyne Lodge youth service to house eight young women in crisis. Anna Tapperell praises their efforts.

"Vodafone staff worked together against the clock, sourcing all furniture, materials and equipment needed to refurbish the property."

Longer term engagements are available through the Adopt A Service program, where employees work with Mission Australia to fundraise and use their professional skills to support a service in the longer term.

"For example, last year a group of employees from AGL 'adopted' Radio House, one of our youth accommodation services, for homeless and disadvantaged young people," says Taperell. On another project Westpac donated over 400 employee hours on two pro bono projects, involving reviews of Mission Australia's website and the efficiency of its donor database.

The Smith Family's Simon Wright believes many a company's investment in volunteer programs enhances their relationships with their local communities. BHP Billiton and Colgate Palmolive partner with The Smith Family in a number of locations around the country, with a focus on Learning for Life that creates sustainable benefits for the communities in which staff live and work.

The Smith Family and the AMP Foundation have launched a \$2 million agreement that will increase the number of children on the Learning for Life education support program by 10 percent, bringing the total number of students receiving assistance to more than 24,000. Utilising its business expertise, Microsoft established the highly regarded Computer Club where Learning for Life students are taught to use computer equipment, the Internet and multimedia software.

Companies should not, however, expect to launch into a program without adequate preparation. Some company managers are surprised when non-profits reject their offer of volunteer assistance.

"At times we've received phone calls from various companies who want to involve one hundred volunteers or so at one of our services with something like two weeks lead time," recalls Anna Taperell. "It's important to educate companies that while a non-profit is always extremely grateful at the prospect of hands-on assistance, the fact is that it may take months of planning, expenditure and organisation to facilitate such a large scale effort."

Simon Wright looks for a coherent strategy. "Volunteering is great, but it has to be part of a corporate community investment program otherwise it's likely to be poorly directed." Like Taperell, he emphasises the need for a multi-dimensional partnership of equals. "Many of the programs rely on an ongoing commitment on the part of the company, and training and infrastructure support from us. It has to be mutually beneficial if it's going to work."

Straightforward generosity motivates most companies that contribute expertise and personnel to partner with non-profit organisations, but the return in satisfied

employees and customers makes it a sound financial strategy as well. In the age of globalization, where many companies appear disconnected from the values of their communities, good corporate citizenship continues to make good business sense.

Contacts and links

Mission Australia

www.missionaustralia.com.au
Mission Australia aims to empower disadvantaged and isolated individuals, families and communities by giving them the support they need to get back on track, and lead more fulfilling lives. Contact Anna Taperell at the Corporate and Community Partnerships Unit to discuss corporate volunteer programs: Telephone (02) 9219 2000

Smith Family

www.smithfamily.com.au
The Smith Family is an independent, non-religious, non-political not-for-profit organisation that has been helping disadvantaged Australians since 1922. It seeks to use practical and effective programs to help families avoid a cycle of poverty. Contact Simon Wright Corporate Partnerships Manager: Telephone (02) 9085 7222

The Prime Minister's Community Business Partnership

www.partnership.zip.com.au
The Partnership's role is advocacy, facilitation and recognition of corporate social responsibility and partnerships between business and community organisations in Australia.

Common Good

www.thechamber.com.au/ns_main.asp
The Common Good is a program that was launched by the Chamber of Commerce (NSW) in 2000. This program has been developed to assist the Australian business community pursue social and environmentally responsible practises, while building long-term competitive advantage.



Masoneller presented to Westmead Children's Hospital.

Member Profile – masoniCare

By Robyn Vale

Mention 'the Masons' to outsiders and they'll often think of secrets and rituals. The Freemasons' commitment to the broader community is not so well known.

masoniCare is the charitable arm of the United Grand Lodge of New South Wales and the Australian Capital Territory. 'Brotherly love and relief' are the cornerstones of Freemasonry, according to masoniCare's Administration and Marketing Coordinator, Sean Harnett, Masonic charity was well-established long before masoniCare was established in 2001.

masoniCare's vision is 'to promote and uphold the Masonic Principle of Charity and heighten public awareness of Freemasonry's commitment to the community'.

Since 2001, masoniCare has donated around \$370,000 in regional grants to local organisations, including the Children's Hospital at Westmead, UnitingCare Burnside and Inspire Foundation's ReachOUT! website; and over \$25,000 to outstanding young people in NSW and ACT.

Through their partnership program, masoniCare has invested over \$225,000 in Surf Life Saving NSW, and a further \$53,000 since 2004 in its new InterACTION grants program.

The financial base for masoniCare's work comes from the proceeds of the sale of a Masonic school site at Baulkham Hills, in Sydney. The interest from this lump sum is supplemented by a pledge program to solicit donations from members, a biannual raffle, and a \$4 contribution per member in their annual fees (there are 18,000 Freemasons in NSW/ACT).

masoniCare is run by a volunteer board with one full-time paid employee. The United Grand Lodge of NSW and the ACT is split into 13 regions. Across those regions are 390 lodges, divided into 60 districts.

Projects

masoniCare provides two \$5,000 grants per year to projects or organisations nominated by the Masonic community within each of the 13 regions. The current focus for these grants is 'helping young minds in need'.

By the same process, one \$2,000 grant per region is awarded each year to a young person of outstanding achievement in community involvement and leadership.

masoniCare has a partnerships with Surf Life Saving NSW. They have sponsored an annual Lifesavers Relay; an annual Youth Leadership Camp attended by around 30 teenagers; and Awards of Excellence to reward surf life savers across NSW.

Another partnership has resulted in a lecture series, Stop the 4 o'clock knock, which aims to help older teenagers and their parents understand the causes and consequences of car crashes.

The Disaster Relief and Benevolent Funds are held separately, and managed by masoniCare on behalf of the Grand Lodge. They provide relief to victims of disaster; and to Freemasons and their families in times of distress.

The InterACTION grants program, established in 2004, requires the active

involvement of local members. Funding is allocated up to a dollar for dollar match (which may be capped) where local members have raised funds for a community project. Beneficiaries of the program include: the Lupus Association; Rotary Lodge, for people receiving treatment from Macquarie Base Hospital; a palliative care unit at a local hospital; and a schizophrenia 'clubhouse'.

Sean Harnett believes that masoniCare is "just starting to go places". The InterACTION grants program, in particular; has increased member ownership of and support for masoniCare's work. It may be that as the range of projects expands over the coming years, the old image of the Freemasons as mysterious and secretive, will be well and truly exploded.

www.ugl.nsw.freemasonry.org.au

'Brotherly love and relief' are the cornerstones of Freemasonry according to Sean Harnett of masoniCare.



District 113 presents a cheque to Life Saver Rescue.

Community Foundations Symposium – Berlin

By Catherine Brown, Consultant to Philanthropy Australia and FRRR

Five Australians attended the Community Foundation Symposium hosted by WINGS in Berlin in December 2004. We came back knowing that we were part of a global movement of 1,100 community foundations in 42 countries. Five years ago, Australia was very much the newish kid on the block – now we're regarded as a growing part of the movement, with 26 (and growing) community foundations of our own.

Sustainability was a recurring theme. A range of innovative methods to generate income were described – including community markets and even a communal fishing pond!

Our model of community foundations was reflected in many other places, from rural US to Eastern Europe.

Several key messages came out of the symposium. The first was that community foundations should be community service organisations first, not donor service vehicles. A community foundation should be a collective voice for a shared vision. They should focus on general donations so they can respond to changing community needs through the availability of general and not donor preference funds.

Keynote speaker, Dr Emmertt Carson PhD argued that a donor focus was in conflict with collectively raising resources to address problems. Examples given of fund raising from broader community donations included two coffee farming communities in Kenya who raised 5.5 million shillings each to establish the endowment fund for their foundations. Contributions from local business people and small donations had also been significant in Eastern and Western Europe.

Sustainability was a recurring theme. A range of innovative methods to generate income were described – including community markets and even a communal fishing pond! New research presented at the symposium showed that overall, neither levels of income or wealth were determinants of successful growth of community foundations or their assets. More important were education and stability of the local population, as well as higher geographic intensity. This means that income and wealth patterns, or the age of the population, should not determine the location of new community foundations.

Community building was another important role for community foundations. In Europe, especially Germany and Eastern Europe, they actually provide direct community services. Others pilot projects, initiate research, convene meetings, and add value to small community organisations.

It is inspiring to be part of the international community foundation movement at this time.

The Myer Foundation generously funded Catherine's participation in the Community Foundations – Symposium on a global movement. A full report is available on www.philanthropy.org.au/community/index.html



Greg Heys, project officer, completed an outstanding Feasibility Study which explained the unique history of the region, particularly the social impact of massive industrial operations.



Left to right: Bert Eastoe, Dennis Ginnivan, Charles Parkinson, Prue Smith and David Bartram.

Community philanthropy grows in New South Wales

From Catherine Brown

The Community Foundation for the Albury Wodonga region will be launched in May 2005. Through a special grant from the Department of Family and Community Services, Philanthropy Australia has been supporting the development of this new member of the New South Wales community foundation network.

Key meetings were held with the Community Chest, and advice was provided by members of the Helen La Nauze Fund. Albury City Council has played a vital role as the host organisation. Through Lesley Atkinson and Maralee Vogel, Council provided support and office space for Glenys Atkins, the local project officer.

The Steering Committee included very experienced and well connected people from the arts, business, academia, the media, community and professional backgrounds. An important partnership is being developed with Hume Building Society. The Board, led by Chairman, Time Razer and local advisers (especially local solicitor David Bartram) are to be congratulated.

Meanwhile in Newcastle, Mission Australia has demonstrated a wonderful capacity to incubate a community led project. Greg Heys, project officer, completed an outstanding Feasibility Study which explained the unique history of the region, particularly the social impact of massive industrial operations. The area has some very critical needs, including the mental health of older single men (some longer term unemployed) and environmental issues.

The Hunter Valley Community Foundation, led by chairman Arch Humphries is about to incorporate and establish a Public Fund.



Left to right: Greg Heys, Michael Resenfeld and Anne Long at the Hunter Valley Community Foundation Workshop.



Author Janet Paisley at the Union Station homestead (photograph from *The Warrnambool Standard*; photographer Glen Watson).

Legacy of farming sisters lives on

By Eric Williams

The story of two successful farming women and their philanthropy was recently celebrated in Victoria's western district.

'The Jones Girls' Bounty', a history of the Gwen and Edna Jones Foundation by Janet Paisley, was launched by Lady Southey in the garden of The Union Station homestead in Warrnambool in front of 150 guests.

Mrs Paisley, the cousin of the two Misses Jones, spent two years researching the history of the property (now owned by Mr Colin McKenna), the lives of Gwen and Edna Jones, and the foundation they established for the benefit of the local district.

On 6 February 1935, when Australia was reeling from the Great Depression, an auction notice appeared in *The Warrnambool Standard*:

"Executors sale, this day, of choice western district grazing property called 'Union' comprising 5,060 acres high class woolgrowing and fattening land, substantial homestead..."

The property was knocked down to a virtually unknown farmer, Robert Jones, for the sum of £35,673.

Jones split the property in half and registered it in the names of his two daughters, thus bypassing future death duty.

When Robert died in 1944, full managerial control of the property fell to the two young women (their mother having passed away many years earlier.)

Gwen and Edna Jones ran a prosperous farm and automated dairy.

The Jones sisters never married, and having no close relatives, they established a small philanthropic trust in 1974 to eventually take over their substantial assets.

Gwen and Edna personally selected the five Foundation directors and made

their desires and aspirations for the trust known. Edna passed away in 1995, Gwen in 2000 at the age of 91. 'Union' was auctioned in late 2001, yielding \$7.95 million. The total corpus of the Foundation was approximately \$10 million.

Since then, distributions of around \$1.25 million have been made. Beneficiaries have included King's College, Lyndoch and the Warrnambool City Council. The Foundation's assets have risen to nearly \$12 million.

The Jones sisters could never have imagined the impact their bounty is having in South West Victoria in such a short period of time. As the old farm hands would say, "they were the salt of the earth."

The Jones Girls' Bounty is available for \$40 from Collins Bookshop, 99 Liebig Street, Warrnambool. Telephone (03) 5562 4272

Vale Margaret Lawrence

Philanthropist and esteemed supporter of the visual arts, Margaret Lawrence, passed away earlier this year, aged 90.

A longstanding donor to various community organisations, she established the Margaret Lawrence Bequest in 2001.

A highly motivated and independent woman, Margaret graduated from Melbourne University with a Master of Arts in the 1930s, worked in New York as a journalist, and travelled the world for three decades extending her knowledge of and passion for culture, history and art.

Margaret's major personal interest in her latter years was as a collector of ceramics. She donated her extensive private collection, spanning eight decades of Australian work, to the Victorian College of the Arts. She recently provided a scholarship to a Masters student at the VCA, and support to the College itself.

Margaret's benefactions have also assisted many organisations which work with those most disadvantaged in our community. The Margaret Lawrence Bequest will stand in perpetuity to benefit many in the community over the next century and beyond.



Margaret Lawrence.

Margaret's personal interest in her latter years was as a collector of ceramics. She donated her collection to the VCA.

Philanthropy New Zealand 2004 Conference

Inspired, Effective Philanthropy: Tools, Debates and Strategies – 2-3 November 2004

Vanessa Meachen

Inspiration, understanding and strength through collaboration were predominant themes of the Philanthropy New Zealand 2004 Conference. A smoothly running program with plenty of variety, and a warm and friendly atmosphere with plenty of goodwill, made this conference a pleasure to attend.

Keynote speaker, Fiona Ellis of the UK's Northern Rock Foundation, provided a snapshot of the challenges faced by her foundation and the strategies used to overcome those challenges with a program of informed, effective philanthropy. Fiona also delivered an interactive workshop session on fairness and effectiveness.

Australia was well represented both in attendees and in presenters, with Genevieve Timmons, Trudy Wyse, Dorothy Scott and Elizabeth Cham all playing a part. For the Australian delegates, the chief surprise of the conference lay in learning about

New Zealand's community trusts – many of which administer substantial corpuses for small populations – and about the ways they are using their funding in very innovative and unusual ways. John Prendergast of the Community Trust of Southland spoke about his Trust's efforts in using both its investment capital and its annual grants budget to effect change in the Southland region, including the innovative Zero Fees scheme at the Southern Institute of Technology.

Particular attention was paid to Pat Snedden and his address on 'Rangatiratanga and generosity: making

the connections', described by one attendee as reaching Martin Luther King-like levels of inspiration!

Themes of dignity, mutual respect and pride were of especial importance throughout the conference, as the Australian contingent both shared their own experience and learned from our neighbours across the Tasman. The welcoming spirit was strong and its effects will linger long after the conference is over.

www.philanthropy.org.nz

Alan Broadbent speaks

Charles Brass

Alan Broadbent is the voluntary chair of the Boston based not-for-profit consultancy The Philanthropic Initiative (TPI).

Although on a private visit to Australia and New Zealand, Alan agreed to give a public presentation in Melbourne during February. Alan strongly believed that it was a citizenship duty of all companies to be involved in social responsibility, on the proviso that this enhanced the company's connection to its customers and strengthened their employee loyalty.

In engaging with social responsibility, corporations (and in fact all foundations) should adopt the Hippocratic Oath standard that 'at very least do no harm' and he gave some examples where he believed harm had been done. This required at the least an effort to 'notice what happens as a result of what you do.'

Alan indicated that his personal involvement in philanthropy was underpinned by his awareness of three growing instabilities in the world: the gap between the rich and the poor, environmental degradation and mass migration of people. He proposed that a key role for philanthropy was helping to find a way through the chaos which characterises these instabilities, and in that way truly making a difference. He did note, however, that his real skill was not in making good grantmaking decisions, but listening carefully to the various communities with which he came into contact.

The session was hosted by Michael Liffman on behalf of the Asia Pacific Centre for Philanthropy and Social Investment.

www.tpi.org



Jane Kenny, Philanthropy Australia and Coty Cortese, The Mary Potter Trust Foundation.

Family foundations come together

By Jane Kenny

Another successful seminar for family foundations was hosted by the Centre for Philanthropy and Non Profit Studies (CPNS) at Queensland University of Technology in March.

Key themes included: getting it right from the beginning, the value of collaboration, going outside the family and immediate circle for advice and expertise; the importance of honesty, accountability and transparency; and recognising that giving is highly skilled work. A wide range of eminent speakers gave some practical tips as well as useful philosophical frameworks for the smaller foundation.

John Emerson AM, a partner at Freehills, was presented with an award (the keys to the QUT library!) to honour his enormous contribution and outstanding services to the work of CPNS.

It was an excellent day, thanks to Professor Myles McGregor-Lowndes and his team, and thanks to the Prime Minister's Community Business Partnership for funding the seminar.

<http://cpns.bus.qut.edu.au>

John Emerson was presented with an award to honour his enormous contribution.



Dates for the Diary

International Funders for Indigenous Peoples Annual Conference

When: May, 2005
Where: New York City, USA
Further Information:
www.firstpeoples.org/ifip.html

Moving Mountains: Community Foundation Network Conference 2005

When: 18-20 May 2005
Where: Edinburgh, Scotland
Further Information: www.communityfoundationnetworkconference.com/

European Foundation Centre

Foundations for Europe: Making the Union Work for All Citizens

When: 4-6 June 2005
Where: Budapest, Hungary
Further Information: www.efc.be/aga/

Diversity and Aged Care Conference

When: 9 June 2005
Where: Flemington Racecourse, Victoria
Further Information: Ljubica Petrov, Manager, PICAC – Victoria
Telephone (03) 9398 2354 or email picac@benetas.com.au

Leverage and Leadership: Accountability in Action

Council on Foundations 2005 Corporate Grantmakers Summit

When: 8-10 June 2005
Where: San Francisco, CA
Further Information: <http://int2.cof.org/conferences/corp2005/>

Adelaide Festival of Ideas

When: July 2005
Where: Adelaide
Further Information: www.neilwardpublicity.com.au (visit the Media page)

International Conference on Engaging Communities

Joint Initiative of the United Nations and the Queensland Government

When: 14-17 August 2005
Where: Brisbane, Queensland
Further Information: OzAccom Conference Services
Telephone (07) 3854 1611
info@engagingcommunities2005.org
www.engagingcommunities2005.org

Conference on Social Capital

When: 21-22 September 2005
Where: Hotel Dolmen, Buggiba, Malta
Further Information: email secretary@socialcapital-foundation.org
www.socialcapital-foundation.org

Conference on Economy and Community

When: 23-24 September 2005
Where: Hotel Dolmen, Buggiba, Malta
Further Information: email secretary@socialcapital-foundation.org
www.socialcapital-foundation.org

The Second International Philanthropy Conference

A wealth of experience building philanthropy, corporate citizenship, and community capacity
When: 9-12 October 2005
Where: Melbourne, Australia
Further Information: <http://paweb/whatson/conference/index.html>

Diversity in Health 2005

When: 17-19 October 2005
Where: Hilton on the Park, Melbourne
Further Information: Diversity in Health 2005 Secretariat
Telephone (03) 9457 7130 or email info@amf.net.au
www.amf.net.au/event_nat_healthDiversity.shtml

Philanthropy Australia International Conference

From 9-12 October 2005 (save this date) the Australian philanthropic community will assemble at the Sofitel Hotel in Melbourne for 'A Wealth of Experience', Philanthropy Australia's second international conference. The Sunday audience will be the grantseeker public who will be able to meet and hear from over 20 prominent philanthropists, and from Monday to Wednesday philanthropists and their trustees, St Andrew's War Memorial Hospital staff and advisers will enjoy a program featuring over 20 international and 70 Australian presenters, exploring issues ranging from the future of philanthropy to current best practice. The conference dinner, which will feature the announcement of the 2005 Equity Trustees non-profit CEO Awards, will be held on Tuesday evening.

The conference program and registration form will be posted on our website in May – www.philanthropy.org.au/whatson/conference/index.html

Members of Philanthropy Australia

New Members

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

Full Members

Annamila Pty Ltd
Bass Coast Community Foundation
Boeing Australia Holdings
Foster's Group
Gonski Foundation
Maple-Brown Family Charitable Trust
Promina Foundation
The Robert Salzer Foundation
Western Australian Community Foundation

Affiliate Members

Merrill Lynch Private Wealth Services
Murdoch University
New Philanthropy
Philanthropy Squared

Associate Members

Greening Australia Vic
National Aids Fundraising
The Salvation Army
St Andrew's
Surf Life Saving Foundation
YWCA NSW

Philanthropy Australia would like to acknowledge the support of:

Freehills
Brian Sherman

Leading Members



THE ATLANTIC
PHILANTHROPIES

COLONIAL FOUNDATION



THE JACK
BROCKHOFF
FOUNDATION



The
WILLIAM BUCKLAND
FOUNDATION
WBF

Life Members

Ben Bodna AM
Patricia Feilman AM
Dame Elisabeth Murdoch AC CBE
Jill Reichstein OAM
The Stegley Foundation
Meriel Wilmot

Full Members

The A. L. Lane Foundation
AMP Foundation
Alcohol Education & Rehabilitation Foundation
The Alfred Felton Bequest
Alfred Thomas Belford Charitable Trust
A. Angelatos
The Andrews Foundation
ANZ Executors & Trustee Company
ANZ Staff Foundation
Australia Post
Australia Business Arts Foundation
Australia Council for the Arts
The Australian Elizabethan Theatre Trust
AXA Australia
The Ballarat Foundation
D. & S. Bardas
BB Hutchings Bequest
Besen Family Foundation
BHP Billiton Community Trust
Bill & Jean Henson Trust
The Body Shop
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
Equity Trustees Limited
The Ern Hartley Foundation
Ernest Lonsdale Brown Trust
Ethel Herman Charitable Trust
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
M & M Freake
Freehills
The GM & EJ Jones Foundation
Gandel Charitable Trust
Geelong Community Foundation
Geoffrey Gardiner Dairy Foundation
George Alexander Foundation
Goldman Sachs JBWere Foundation
GrainCorp Foundation
Save the Children Australia
The Grosvenor Settlement
The Gualtieri Vaccari Foundation
H V McKay Charitable Trust

G. Handbury OAM
 Harold Mitchell Foundation
 The Helen Lempriere Bequest
 Helen Macpherson Smith Trust
 Hewlett Packard Australia
 The Hugh Williamson Foundation
 Hunter Hall
 The Ian Potter Foundation
 Ilhan Foundation
 The Invergowrie Foundation
 International IOOF Foundation
 J C Pascoe Memorial Charitable Trust
 The Jack Brockhoff Foundation
 James Simpson Love Trust
 JLF Group of Companies
 John William Fleming Trust
 The Keir Foundation
 Kingston Sedgefield (Australia)
 Charitable Trust
 LEW Carty Charitable Fund
 Law & Justice Foundation of NSW
 Lawrence George & Jean Elsie Brown
 Charitable Trust Fund
 Ledger Charitable Trust
 The Lion Fund
 Lord Mayor's Charitable Fund
 Lotterywest
 Macquarie Bank Foundation
 Mallesons Stephen Jacques
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 Margaret Lawrence Bequest
 masoniCare
 Matana Foundation for Young People
 mecu
 Melbourne Community Foundation
 Melbourne Newsboys Club Foundation
 Mercy Foundation
 The Miller Foundation
 The Moore Family Philanthropy
 Foundation
 The Mullum Trust
 The Myer Foundation
 Myer Community Fund
 National Australia Trustees
 National Foods
 National Foundation for Australian
 Women
 Nelson Meers Foundation
 Norman H Johns Trust
 The Norman Wettenhall Foundation
 NRMA Foundation
 Patrick Brennan Trust
 Paul Edward Dehnert Trust
 The Percy Baxter Charitable Trust
 The Perpetual Foundation
 Perpetual Trustees Australia
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 Petre Foundation
 Pfizer Australia
 Philip Morris
 Pierce Armstrong Foundation
 Poola Foundation
 PricewaterhouseCoopers Foundation
 Queensland Community Foundation
 RACV Foundation
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 Monash Institute of Reproduction and
 Development
 Monash University
 National Heart Foundation of Australia

NIDA
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 Royal Blind Society
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 The Smith Family
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 St George Foundation
 St Vincent's Health
 The State Library of NSW
 The State Library of Victoria Foundation
 Sydney Opera House
 Tabcorp Holdings
 Tamar Region Natural Resource
 Management Strategy Reference Group
 – Public Committee of Management
 United Way Australia
 The University of Melbourne – Alumni
 Office
 The University of Newcastle
 University of South Australia Foundation
 University of Tasmania Foundation
 The University of Western Australia
 VicHealth
 Wise Community Investment
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