



PHILANTHROPY  
*Australia*

# AUSTRALIAN Philanthropy

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Globalising Philanthropy:  
Australians Giving Overseas





# Globalising Philanthropy: Australians Giving Overseas

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# From the President

*Lady Southey, President*

Some Australian philanthropists have adopted the perspective that our role is to act as a catalyst for social change. In that context, it makes sense to think of ourselves not just as Australian citizens (as individuals, organisations or corporations) but also as global citizens. In a world that is growing ever smaller through improved communications and a more global economy, our commitment to improving the society we live and work in requires an acknowledgement that justice does not begin and end at the Australian coastline.

The extent to which the Tsunami in December 2004 changed our philanthropic practice as a sector and as a nation is still emerging. We know that overall, Australians were very generous in their response during the immediate weeks following the catastrophe. The consensus to date

is that this generosity has continued through, rather than replaced, donations to Australian not-for-profit organisations. One clear lesson that did arise, specifically for many charitable organisations, was the need to put in place policies and procedures that would enable them to respond promptly and appropriately to emergencies. Leading on from this is the question 'do we have a role beyond the emergency response?'

It is hard not to be overwhelmed by the needs of a whole world, when there is still so much that can be done at home. In some ways, responding to a crisis is the easiest part. So how do we make a difference on a longer term, more sustainable basis? Timing, mutual knowledge, and genuine partnership, are all important.

The principles of strategic philanthropy apply to international funding as much as local grantmaking. If we can help neighbouring communities develop their own skills, technology and resources, we are investing in greater self-sufficiency. We can't prevent natural disasters – nobody can hold back the tide, literally – but the catastrophic effects of war,

disease and poverty can be contained through timely investment in economic and social infrastructure. It is within this framework that Australian foundations and corporations may wish to consider whether or not they see themselves having a role.

For some charitable trusts and foundations, the Tsunami has encouraged a broader view of their giving commitments, to include at least an examination of the possibilities of giving off-shore. For others, an international aspect to their giving already existed well before December 2004. There are, of course, several obstacles to international giving, including significant legal ones, and of course the limits imposed by trust deeds which must be respected.

This edition of *Australian Philanthropy* looks at the various ways some Australian foundations and corporations have found to contribute to projects and communities beyond our shores, and some of the issues they have faced. I hope it stimulates debate about the role Australian philanthropy can play in a global context.

## Farewell to Elizabeth Cham

Philanthropy Australia members and friends in the sector gathered on two separate occasions in February 2006 to farewell Elizabeth Cham after 10 years as National Director of Philanthropy Australia.

Lady Southey hosted a small dinner for close friends and colleagues to farewell Elizabeth on 8 February, at which speakers, including Maud Clark (Somebody's Daughter Theatre), Sir Gus Nossal (Patron of Philanthropy Australia) and Robert Fitzgerald (outgoing chair of the National Roundtable of Nonprofit Organisations) expressed appreciation of Elizabeth's work and personal qualities.

This was followed by a function for members on Friday 10 February at the Ian Potter Centre at Federation Square. Louise Gourlay (board member, The William Buckland Foundation) and Tom Healy (board member, The Ian Potter

Foundation) spoke about Elizabeth's contribution to tax reform and visionary philanthropy, while Philanthropy Australia staff member Vanessa Meachen delivered a moving tribute to Elizabeth's inspirational leadership of her staff. Lady Southey, Philanthropy Australia's President and President of The Myer Foundation, spoke about Elizabeth's work in the sector and announced the two new and exciting roles which Elizabeth is stepping into; one as chair of the National Roundtable of Nonprofit Organisations, an organisation she was instrumental in establishing, and one research role with the Faculty of Arts at the University of Melbourne.

We wish Elizabeth every success in both roles, and know that we have not yet seen the last of her work in the sector.



*Vanessa Meachen speaking at Elizabeth's farewell, at the Ian Potter Centre.*



"I am acutely aware that we now need to look beyond our own shores, to be aware of and contribute to the global community. Philanthropy Australia will be further developing relations with our sister organisations overseas."

## From my Perspective

*Gina Anderson, CEO of Philanthropy Australia*

As we drove down the mountain side to Patong Beach on the island of Phuket to attend the Asia Pacific Philanthropy Consortium (APPC) Conference in November 2005, I was struck by the beauty of the place – the idyllic tropical paradise.

Despite having seen the footage on television and being able to see the devastation still evident, I found it virtually impossible to imagine a tsunami had occurred in this tranquil spot.

The indiscriminate nature of the waves and their devastating destruction is made even more senseless by the fact that some buildings and structures were left standing, while the building next door was demolished. The devastation is immense and quite stark. Whole suburbs, whole villages quickly wiped out. Livelihoods and businesses completely destroyed by power of the waves.

And yet, the Thai people are working hard to rebuild. There was an air of activity and industry. Building construction everywhere, shops trading, the resort returning to normal. Aid organisations working with local people to rebuild their businesses and their crafts, providing them with accommodation, schooling and the like. The Thai Government has obviously moved quickly to put money and effort into the rebuilding process. It's now time for the tourists to return.

The APPC Conference entitled 'Philanthropy in Disasters: Tsunami and After' gave me an excellent introduction to philanthropy in a global context together with the opportunity to meet my counterparts in the Asia-Pacific region.

The extraordinary level of donations worldwide was clearly one of the themes of the conference. Tracking, monitoring, accountability and communication issues that result from managing and using the large amount of money donated to assist those most affected all emerged as major issues. It also became clear that there needs to be more effective collaboration not only between different stakeholders but also between NFPs working on the ground. Greater cultural sensitivity and use of local knowledge need to be employed by all participants.

The role and impact of the media in highlighting to the world the devastation of the catastrophe and the plight of those left in its wake is becoming increasingly important as is the role of the internet in spreading information and collecting donations.

For Philanthropy Australia there are many lessons to be learned, particularly in relation to the role of coordinating information and directing donors in the aftermath of a disaster. The National Volunteer and Philanthropy Centre in Singapore had clearly taken a proactive role in the aftermath of the Tsunami and provided their suggestions and learning to the conference.

There was also a reminder that the lessons learnt from the Tsunami should be used in all disaster planning programs, not just for tsunamis and earthquakes. In that regard it was highlighted that the NFP sector had much to learn from the corporate sector in disaster planning. One particularly interesting model was put forward by Peace Winds Japan. They have formed the 'Japan Platform', a mechanism by which members of various sectors of society (government, private corporations and NGOs) cooperate in extending humanitarian aid.

Many thanks to The Myer Foundation and the APPC for facilitating my attendance at this conference.

As I write this at my desk, back to the business of promoting giving and representing those that give to the community, I am acutely aware that we now need to look beyond our own shores, to be aware of and contribute to the global community. Philanthropy Australia will be further developing relations with our sister organisations overseas, and ensuring our members are fully briefed as to philanthropy in an international context. In particular I anticipate our relationship with WINGS will be strengthened by their move of head office from Brussels to the Philippines to co-locate with the Asia-Pacific Philanthropic Consortium from 2007-2011.

# Accountability in international philanthropy – guidelines from Europe and the United States

In 2005 the European Foundation Centre (EFC) and the Council on Foundations (CoF) created a joint working group to develop a set of principles of accountability specifically related to philanthropy that crosses national borders.

International philanthropy has much in common with its domestic counterpart, but it can also present distinct challenges because of multiple legal systems, differing accounting standards, magnification of cultural differences, geographic distance, and the interplay of international politics and power dynamics.

The draft principles of accountability for international philanthropy, and the practical suggestions that are attached to some of them, represent a first attempt to articulate some of the themes and good practices that have emerged from the consultations and working group discussions to date. The working group welcomes all constructive comments and suggestions to this draft, which is merely a starting point for further discussion and elaboration.

This is a summary only, and readers are encouraged to download the full guidelines from the link below.

## **Draft principles of accountability in international philanthropy**

1. Do no harm.
2. Develop a realistic strategy and focus for your international philanthropy.  
  
Recognise that you can't do everything and need to make choices.  
  
Consider ways of providing non-financial resources through mentoring, convening, linking, technical assistance and other forms of support.
3. Don't act in isolation.  
  
Seek appropriate international partnerships and collaborations.
4. Respect, engage and support your international partners and beneficiaries.

Understand the local context (political, economic, social, cultural) in which your international philanthropy will take place.

Visit the area yourself or listen to trusted peer organisations or local experts who can talk to a cross-section of the community.

Build capacity-fund organisations, not just projects.

View partners as agents of change rather than recipients of money.

Be flexible and allow for the unexpected.

5. Comply with all relevant legal requirements.
6. Ensure good stewardship of your philanthropic resources.

Comply with accepted professional accounting standards in your own country but be aware that the same standards may not apply in the country in which you are making the grant.

Know enough about your grantee/partner to determine that it is a legitimate organisation with sufficient financial controls and capacity to implement the activity you are supporting it to do.

Consider using a professionally run intermediary grantmaking organisation or an internationally recognised accounting firm to make your international grants if you do not feel you have the capacity to make and monitor a grant in a way that will assure good stewardship of philanthropic resources.

7. Communicate openly and often with stakeholders.

Be explicit about your grant application process, format requirements, deadlines and contact persons.

Avoid using professional jargon.

Maintain regular communication with partners/grantees so that potential problems can be identified and resolved early on.

8. Learn from what you are doing and share your knowledge with others.

Work with grantees/partners to develop tools to gauge effectiveness.

Step back from the specific activity you are funding to reflect on the ethical implications and broader impact of the work you are supporting on communities.

Share lessons learned with your stakeholders and others in the international philanthropic field.

9. Be an advocate.

Listen to what your grantees and partners have to say about the policies of governments, businesses, non government organisations and multilateral institutions which may be negatively affecting their lives and livelihoods.

Think about how you can contribute to the efforts of your grantees and partners by advocating on their behalf for policy change.

10. Take risks.

*Download the guidelines at:  
<http://www.cof.org/Content/General/Display.cfm?contentID=3342>*

*Reprinted and summarised with kind permission from Council on Foundations International Dateline, Issue 76, First Quarter 2006.*

*For comments, suggestions or further information about the draft principles, contact Rob Buchanan, Director of International Programs, Council on Foundations at [buchr@cof.org](mailto:buchr@cof.org)*

# How Australian donations are making a difference: Australian Council for International Development (ACFID)

By Geoffrey Winn

For many Australians and non-government aid agencies, the 2004 Tsunami was a call to arms. In its immediate aftermath the United Nations estimates that the Boxing Day Tsunami displaced one million people and deprived five million of basic services.

Initially the most urgent task for aid agencies was to treat disease, alleviate food shortages, and provide emergency shelter. The longer term effort has now shifted to reconstruction, including education and medical infrastructure, and assisting victims to re-establish their livelihoods. For Non Government Agencies (NGOs) this work has been funded by the unprecedented generosity of private and corporate Australians. Much of this work comes under the auspices of the Australian Council for International Development (ACFID), an independent nation-wide association of 80 Australian non-government organisations working in the field of international aid and development. Association members include the Australian Red Cross, World Vision Australia and CARE Australia. It is committed to achieving sustainable human development. In which people are able to enjoy a full range of human rights, fulfil their needs free from poverty, and live in dignity.

ACFID recognises that individual and corporate donors to aid relief have an absolute right to accountability for the distribution of their funds. To this end the work of members is carried out under strict guidelines imposed by a mandatory Code of Conduct. It is administered by an independent committee that includes representatives of the Fundraising Institute of Australia, Australian Consumers Association and the Institute of Chartered Accountants Australia. The Code defines standards of governance, management, financial control and reporting with which NGOs should comply, and guarantees annual independent auditing of expenditure.

ACFID also produces quarterly accountability reports that detail donations and spending on Tsunami relief by 29 ACFID member agencies. These reports ensure transparency of administrative costs, presented as a proportion of total Tsunami income across all agencies. Following the third quarter reporting, these costs have averaged at just over 3 per cent.

By 30 September 2005, the total donations to reporting 29 ACFID members was \$272 million from public donations and \$72 million from corporate. As at the end of 2005, it has been estimated that half of this total has been spent, which corresponds to the long term nature of the relief effort. Most ACFID members expect to be active in reconstruction projects until at least 2008. Nevertheless, some media reports have criticised the pace of reconstruction as too slow, perhaps understandable if the massive undertaking is looked at in isolation.

To put the Tsunami disaster in perspective, it's helpful to recall the decade-long reconstruction following Darwin's Cyclone Tracy. That occurred in a first-world economy with corresponding advanced medical and strategic infrastructure.

In comparison, the logistical challenges in the aftermath of the Tsunami have been immense, especially considering the sheer numbers of displaced and traumatised people, many of who were living in poverty or drawing a meagre livelihood prior to the disaster. Access to devastated areas has been hampered by lack of infrastructure, for instance in war-torn Aceh, where most public roads and bridges were destroyed along a 200km coastline band.

Additionally, NGOs must operate within the planning parameters of national and provincial governments. As an example, in Sri Lanka, the government decided

to ban any re-building within 100 metres of the coast. This presents a complicated challenge for those involved in early stage planning of reconstruction. Also, the Indonesian government's blueprint for reconstruction only became available six months after the Tsunami, which impacted on program planning by Australian NGOs.

ACFID has drawn some long term lessons from the experience of aid relief in the early stages of reconstruction. These include the value of leveraging off an international NGO network and the importance of prior investment in disaster preparedness. Australian NGOs were mobilised in the emergency phase with their local counterpart NGOs within 48 hours, indicating a remarkable level of response based on decades-long relationships. Building upon this relationship, future disaster management needs to be a holistic endeavour grounded in ongoing planning. This requires collaboration and effective partnerships between private and government stakeholders, despite the challenges of disparate economic and ideological structures.

A culture of preparedness needs to be developed, through local education programs including disaster scenario planning for public administrators.

Nonetheless ACFID has been able to report that its member agencies made a significant impact in tsunami-affected communities through the effective use of the donations made to them by Australians. It is clear that continued support for the peoples affected by the Tsunami will allow them to create sustainable livelihoods, and in many cases alleviate the poverty that existed long before the events of Boxing Day 2004.

*ACFID quarterly reports are available online at [www.acfid.asn.au](http://www.acfid.asn.au)*



# Why do I give to projects in developing countries?

*By David Morawetz, Founder and Director, Morawetz Social Justice Fund*

This is an edited version of a paper first presented at the Princeton University conference on 'Philanthropy, Ethics and International Aid', 6 May 2005.

When my father Paul Morawetz died in April 2001, I inherited a share of his estate. It turned out to be far more money than I had ever expected to have. It was clear to me that I wanted to use most of this money to do something, no matter how small, to reduce social and economic injustice, and inequality of opportunity. I am eternally grateful to my father for providing me with the opportunity to do this, and for the chance to test how deeply held my egalitarian beliefs are. I am happy to find that they are deeply held indeed.

## Why a social justice fund?

I have always believed that life is unfair. In particular, I believe that the biggest lottery in life is: what country are you born in, and into which family? I believe that it is unfair that, by pure accident of birth, some people (like myself) have a relatively easy start in life, being born into families that are relatively well-off, whereas others have to struggle all the way, because they are born into very poor families, or families who (for whatever reason) are less able to support and nurture them.

This belief was strengthened 42 years ago when I spent a summer at age 18 backpacking and travelling on third class trains in India, seeing at first hand extreme poverty and deprivation. "There, but for the grace of God, go I" is a saying that still resonates with me. After all, why should one percent of the world's population own more than 20 per cent of the world's resources? We are all born and have no choice where or when, we all die and have no choice where, when or how – to me, that makes us all equal. Why then, should we not do what we can to make standards of living as equal as we can?



*The Ethiopian village well committee (three men and three women) with the new well and hand-pump.*

## What are the current funding priorities?

The criteria for grants from the Morawetz Social Justice Fund are flexible, and will no doubt change over the years. At present they are as follows:

1. The grants should 'make a difference' to the people who benefit from them. In general, there should be no alternative source of funding available for the project under consideration.
2. Grants should encourage long term sustainable solutions to problems, following the principle: "Give a person a fish, and you feed him or her for a meal; teach people how to fish, and you feed them for life."
3. Grants may not be used to benefit only one religious group. That is, grants may not be earmarked only for Christians, or Muslims, or Jews, etc. This does not mean that grants cannot go to organisations like the Brotherhood of St Laurence or the Good Shepherd Youth and Family

Service – such groups definitely remain eligible, because their good works are open to all, regardless of religion.

4. Grants should have a social justice component, addressing issues of poverty and inequality. Raising society's consciousness regarding inequality and unfairness, and funding research into poverty and ways of alleviating it, are additional important eligible uses for grants.
5. A significant proportion of grants should go to help people in developing countries, and in particular, to help some of the poorest people in the world.

## Why give aid to developing countries?

Why give grants to projects in developing countries? Because I believe that a dollar granted in developing countries can often have a bigger impact in increasing the sum total of human happiness than





*An Ethiopian villager with his goats.*

"There are 1,000 people in the village. The cost of providing a lifetime supply of safe drinking water to each Ethiopian villager was just \$10. I cannot think of a better use for \$10 than providing safe drinking water to a villager for life!"

a dollar spent in richer countries. For example, take one project that the Morawetz Social Justice Fund funded – provision of a well in a village in Ethiopia. Before the well was installed, women and children from the village would walk for three hours every day to get water from a river that contained dirty, brown, stagnant, polluted water, water in which animals and people bathed, urinated and defecated. As you can imagine, this water was full of diseases. By contrast, the water from the new well passes the World Health Organisation standards for drinking water fit for humans. The cost of this project was \$10,000. There are 1,000 people in the village. So the cost of providing a lifetime supply of safe drinking water to each Ethiopian villager was just \$10. I cannot think of a better use for \$10 than providing safe drinking water to a villager for life!

### What are examples of projects in developing countries?

Grants from the Morawetz Social Justice Fund in its first two years amount to a total of \$342,000. Just under half of this has gone to projects in developing countries. The top two priorities in developing countries at present are (a) the provision of safe drinking water, and (b) the provision of education and income-earning opportunities for women and girls. Access to safe drinking water is needed to eliminate the diseases, some of them potentially fatal, that are carried in polluted water, and to free up the long hours that many villagers in developing countries have to spend each day in walking to fetch water. Women and girls' education is singled out partly because girls are discriminated against in access to education in some countries. In addition, once girls are educated, they are likely to have fewer children, and they are able to devote more resources to each child, so each

child gets a better start in life. At a macro level, economic and social development are closely correlated with the level of female education.

Grants to projects in developing countries so far include the following:

- safe drinking water in China, East Timor, Ethiopia, Laos and Southern India;
- education of girls in Nepal and Zambia;
- women's education in Thai refugee camps on the border with Burma;
- women's literacy in East Timor;
- women's vocational education in Afghanistan;
- income-generating schemes for women in South Africa and Tanzania; and
- micro-credit and micro-enterprise development for women in Ghana, India and Indonesia.

These grants have been made through Oxfam Australia (formerly Oxfam Community Aid Abroad), Students Partnership Worldwide, the International Women's Development Agency, the Afghan Australian Volunteers Association, and Opportunity International. In almost all cases, a local developing country NGO was involved as well.

Most individual grants are in the range of \$5,000 to \$10,000, with some smaller and some larger. Even small grants can be very powerful for the recipients.

### How do we select organisations to receive grants?

In making grants, we select organisations that have a proven track record of making sure that the money goes where it is supposed to go, and which operate

together with local organisations on the ground, thus ensuring that local wants and needs are taken into account, and building local developing-country administrative capacities in the process. For example, in Ethiopia, Oxfam works with REST (the Relief Society of Tigray), OSHO (the Oromo Self-Help Organisation), and other similar local groups. On our recent visit, we were hosted by Ethiopian personnel from both REST and OSHO, and we were able to see at first-hand the magnificent and important ground-level work that they do.

### Conclusion

In recent years I have been inspired by the Dalai Lama, who said "If you want to be happy, help people, because you are the one who gets the help – if they get some help as well, that's a bonus." I believe strongly in this principle. Certainly it is deeply fulfilling for me to be able to contribute to the promotion of social and economic justice.

It is my hope that the Morawetz Social Justice Fund will be passed on down the generations, to play a small role in promoting social and economic justice, reducing inequality of opportunity, and making the world a fairer place. I am delighted that my three children, Deb, Ben and Simon, have already shown an interest in it. I hope that they will take it over when I am gone, and then pass it on to their children, and their children's children.

*David Morawetz, Ph.D. Founder and Director, Morawetz Social Justice Fund (a sub-fund of the Melbourne Community Foundation).*

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# Foundation for Development Cooperation

*By Beris Gwynne, Executive Director FDC*

**In 1990, Bill Taylor made philanthropic history in Australia by establishing an international development-focused foundation.**

After 20 years of service with the United Nations Development Program, and 12 years building a highly successful agri-tourism company with his wife Lyn, Bill Taylor recognised an enormous regional need. One third of the Asia-Pacific population was living below the poverty line, representing 800 million people or two-thirds of the world's poor.

He also acknowledged Australia's access to resources, its resourcefulness and its strategic position within this developing region. He observed that 'philanthropic giving does not and must not stop at national boundaries in this rapidly shrinking world'.

Bill Taylor established The Foundation for Development Cooperation (FDC) as an independent Australian institution committed to improving the effectiveness of development cooperation throughout Asia and the Pacific. He provided FDC with a capital base of \$7 million, and set it on the path of studying and encouraging grass-roots initiatives which can assist poverty reduction and greater self-reliance.

FDC focuses on finding out what works, and on helping to build partnerships between non-government organisations, business, government and communities to improve initiatives in developing countries. It builds upon the talents and capacities of people in developing countries and their desire to help themselves, and leverages core funding from the Taylor endowment with additional funds from public and private sources.

The Foundation's early work in microfinance is one example. Beginning in 1991, the Banking with the Poor (BWTP) initiative examined ways to extend the reach of grassroots lending, improve the sustainability of these programs, and promote sound commercial practices such as the use of information technology to reduce

transaction costs, with major project support from the Australian Bankers Association.

The BWTP network launched in 1997 is an unusual combination of self-help ending groups, microfinance intermediaries, commercial banks, Central Banks and regulators from more than 10 Asian countries. The Citigroup Foundation is lead sponsor for the BWTP's Asia Microfinance Forum which takes place in Beijing in March 2006.

The successes of the BWTP network in Asia have led FDC to initiate a similar network of microfinance practitioners and stakeholders in the Pacific, with the support of the ANZ Banking Group and Westpac.

FDC is also involved in several community telecommunications pilot projects in Papua New Guinea, in partnership with local stakeholders, and has played a leading role in the expansion of the 'telecentres' movement in Pacific states.

## **Extending Australian philanthropy beyond our shores**

Leading donors recognise that we live in a 'borderless world'. Sustainable, high impact programs require investment in management and administration, and trade-offs have to be made between high profile, media worthy events and the realities of working with poor communities, where a longer term commitment to investment in human capital is often the greatest need.

Legislative changes in 2001 helped to encourage greater private and corporate philanthropy within Australia. A similar initiative to encourage international philanthropy would provide much needed impetus, but even within the current legislative framework, ways can be found to support activities in Australia that have international development outcomes.



*Photograph courtesy of Beris Gwynne, Foundation for Development Cooperation.*

Grantmakers can focus on sectors with clear application to developing countries such as agriculture or water resources management or HIV-Aids, tropical health or marine sciences. An alternative is to develop alliances with leading Australian Non Government Organisations (NGOs) whose mandates allow the use of tax deductible donations for overseas relief and development activity. OXFAM CAA, World Vision Australia, Plan International, Tear Fund, Save the Children, Opportunity International and Caritas are among the better known – but there are many more.

More can be done through creative leveraging of philanthropic, private sector and other resources, to add weight and impetus to efforts to reduce global poverty in our region. Even modest interventions can have an extraordinary impact on the lives and futures of thousands of people, breaking the poverty, environmental degradation and conflict trap. Australian philanthropy is strategically placed to play an important role.

*For more information about FDC, see [www.fdc.org.au](http://www.fdc.org.au)*

# The Keir Foundation in East Timor

*By Sarah Benjamin, Co-Director, the Keir Foundation*

The Keir Foundation is a Prescribed Private Fund (PPF) established by Phillip Keir in 2001. Its objective is to promote civil society in Australia and the region, with a focus on the arts and human rights.

Phillip Keir and Sarah Benjamin – both Directors of The Keir Foundation – have backgrounds in the media and share a belief in the fundamental need for an independent and strong media in a functioning democracy. With this as their starting point, it seemed appropriate that the first project of the new foundation be media focused.

East Timor, as a new country and near neighbour, was an obvious choice. It presented a situation where some money and expertise would make a huge difference to a large number of people, both directly – the broadcasters, and indirectly – the audience. East Timor has a National Broadcaster and a number of well-supported community based radio stations. Radio is the primary means of broadcasting news and information and sharing the stories and experiences of the Timorese people.

Under current Australian law, The Keir Foundation was obliged to partner with an Australian based NGO working in East Timor. So the Foundation Directors set about looking for a suitable partner and after some research joined with APHEDA, The Humanitarian Aid Agency of the Australian Council of Trade Unions.

APHEDA is well established in East Timor and has many successful projects operating in a number of countries in the region. The Keir Foundation is supporting a two-year training program building the community radio and media sector in East Timor. The training covers all aspects of radio production; journalism and program development, technical and financial management. The first year was broad in scope and the second year will build on those foundations.

Phillip Keir visited the program in late 2005, an experience he found rewarding and thought provoking. Phillip has many years of experience in the media but



*Radio Rakambia technician Lindo Miranda Pintu makes adjustments to the station transmitter.*

was sensitive to the fact that conditions in Australia are vastly different to those in East Timor. The opportunity to see first hand how the training was delivered, the reality of conditions on the ground and the important role of the radio stations in the community provided valuable insight.

It has enabled Phillip to contribute feedback and ideas to hone the delivery of training in the second year. In discussions with APHEDA there is a proposal to promote the democratic process in the lead up to the forthcoming general election and another to enhance the cultural role of the radio stations, in particular to expand the potential of the stations to record and produce the music and songs of East Timor. This would require specific training in music recording. The ripple effect of a strong and confident media can touch people in many different ways.

The Keir Foundation's partnership with APHEDA has worked very well and we have been delighted to be able to support such a successful program. But supporting overseas projects is not always straightforward. Current legislation that limits philanthropic funds to be spent with Australian-based NGO's inhibits the scope of some projects. It is not possible to partner with specialised NGO's from

other countries who are often doing very good work in the region. We were fortunate to find an Australian agency working in our target area. If you cannot find an Australian based NGO working in your area, you cannot give and receive a tax deduction.

Moreover current government policy has seen a reduction in the number of Australian based NGOs funded by AusAID and a shift of aid dollars towards bilateral – government-to-government – funding. This has added pressure to the viability of some Australian NGO initiatives in the region.

The response to the Tsunami disaster demonstrated the capacity of Australians to respond to the needs of neighbouring countries, but Australian tax legislation, which only allows tax deductibility to Australian NGO projects, restricts the capacity of Australians to assist more generally. It would be hugely beneficial if the Australian Government made it easier for Australian philanthropic funds to support a greater range of worthwhile projects in neighbouring countries.

Despite the obstacles, The Keir Foundation feels it is important to continue looking beyond our shorelines to support of projects in the region.



# The Myer Foundation – supporting communities after the Asian Tsunami

*By Christine Edwards, Chief Executive Officer, The Myer Foundation and Sidney Myer Fund*

Following the Boxing Day Tsunami in December 2004, there was no question about whether the Directors of The Myer Foundation would provide funding to support communities. The important issue for us was to determine how we could provide support in a useful and timely manner.

Initially, we thought about whether philanthropy had a role at all in responding to disasters, especially given the massive public and government support that had been promised. It was our view that philanthropy could stand alongside public and government support, and that we would play a direct role in supporting communities that had been affected. In this early stage, we consulted with other philanthropic organisations and the Commonwealth Government to find out how they were planning to provide support.

Our decisions were guided by specific considerations. Firstly, what were the needs of people in the affected areas and how were these needs being met? We undertook internet-based research and consulted with major relief organisations such as WorldVision, Oxfam and Red Cross. Obviously operations were in place to respond to the immediate needs for food, clothing, accommodation and medical supplies, and we thought perhaps we should look more for medium to long term opportunities.

Secondly, we asked how these needs might change over time. We consulted with Australian based agencies that had contacts and networks in the Tsunami affected areas including universities, the peak body for international development, ACFID, and not-for-profit organisations. We also liaised with the Indonesian Ambassador HRE Imron Cotan. We learned how different agencies were developing their intervention strategies based on immediate, short, and long term objectives, and this reinforced our view that funding for long term recovery and rejuvenation was very important.



*Temporary accommodation in Phuket. Photograph: Christine Edwards.*

Thirdly, we asked “what does the literature say about best practice in disaster grant making?” Based on the work undertaken by the European Foundation Centre and the Council on Foundations<sup>1</sup>, we developed our own guidelines to help our thinking and decision-making. A fundamental principle was that we would work through organisations or agencies that had direct knowledge of, and involvement with, locally affected communities.

We identified five possible areas for support: developing civil society; infrastructure and capacity building; supporting economic development; strengthening women's capacities; and security for the disabled. The Directors considered options at a number of Board meetings and final decisions were made in May 2005.

Perhaps one of the hardest things in making decisions about what will be funded is the knowledge you have

about the great things that won't be funded. While so many opportunities presented themselves and they all struck chords with us in some way, in the end the decision was based on our internal criteria that we had set, our values, and our knowledge of the organisations' networks in the local communities in Thailand and Indonesia.

So what did we fund? The Directors decided to fund two projects with a combined total of \$560,000.

## **Swinburne University of Technology and The Alliance for Safe Children**

The Alliance for Safe Children is a global child injury prevention foundation with a focus in the Asia-Pacific region. Its major focus is to reduce the burden of child injury throughout the region. In a partnership with the Swinburne University of Technology's Collaborating Centre for Injury Prevention, TASC is engaged in a program in Thailand to create Safe Schools: schools that are



built to construction standards to ensure their integrity in natural disasters; schools that develop curriculum around injury prevention and disaster preparedness; and schools that become catalysts for broader community safety. This program will provide immediate and long term benefits for children, their families, and the community.

TASC has a number of projects in Thailand and through their collaboration with Chulalongkorn University in Bangkok, they chose a village within the Phang Gna Province on Phuket Island. The village has about 1,600 households and a population of between 5,000 and 6,000 inhabitants. Two schools were virtually destroyed by the Tsunami and most of the villagers were living in temporary shelters.

I visited Phuket in November 2005. Initially it appeared that the area had recovered well, and it was difficult to see where the damage had occurred. However, driving north along the coast and leaving behind the tourist towns, the scenery changed very quickly and we saw communities living in temporary accommodation, obvious damage to the physical and natural environments, and fishing boats still stranded kilometres inland.

Many communities are developing new enterprises as they construct boats, build houses and community infrastructure, and establish new batik industries. However, signs of poor planning, hasty decisions, and bureaucratic overkill are evident, such as in the new, primary coloured, plastic playground equipment that stands alone in the middle of previously flooded sand pits and is seldom used by the children; or the public address warning system that has been erected on top of a new tower, but no-one knows how to work it, or even if it does work.

I visited the village of The Myer Foundation project in Phang Gna, and the project is underway and making great progress. The community has had a new school built, and both local people and European volunteers are teaching at the school. The development of the safety curriculum, training of teachers and children in safety strategies, swimming lessons for the children, and community education about safety awareness are part of the program planned for this year.



*Children at their new school in Phuket. Photograph: Christine Edwards.*

Amongst all the obvious signs of loss, the inadequate services, and the making do, it was incredible to see that every child at school was wearing an impeccable whitest-of-white shirt.

### **Melbourne University and the Syiah Kuala University**

Another project being funded involves collaboration between Melbourne University and the Syiah Kuala University in Banda Aceh. Funding will help to establish an Education Research and Training Institute, where hands on training of University teachers and researchers will rebuild the teaching and research capacity at the University.

At this University, early figures indicated that 522 students were dead or missing, over 1,000 had lost parents, some 2,500 did not re-enroll in their courses, and over 5,000 had lost their homes and possessions. Of the staff, it was estimated that 111 academic and 103 administrative personnel had died. There had been a huge loss of qualified graduate lecturers and there were enormous gaps in the teaching capacity of all the academic programs. A further 328 lecturers had their homes destroyed and lost all their books and teaching materials.

The model involves the appointment of a senior Indonesian academic as Director of the Institute, who will liaise with officialdom, handle political protocols, guide the selection of trainees, and maintain linkages with other faculties of the University. In addition a resident foreign expert will facilitate the teaching and research supervision, working in the Indonesian language. The Institute



*Post-Tsunami construction in Phuket. Photograph: Christine Edwards.*

will be supported by a range of academic staff from Melbourne University who will spend periods of time in the Syiah Kuala University, training the new teachers and academic staff.

In conclusion, I would like to comment on an issue that I believe is central to good philanthropy, and that is that making commitments to fund projects, of any size, always requires analysis and good decision-making. And these are more likely to be done well when there is consultation and collaboration, and where we use good information to guide us. Information was readily available: people were very open, happy to share information, give advice and ideas about what might be a good way forward, and the internet was a rich source of information. Using all of this provided us with a firm foundation for our deliberations.

1. *Disaster Grantmaking: A Practical Guide to Foundations and Corporations*, The European Foundation Centre and the Council on Foundations, November 2001.

The Philanthropy Australia Library has copies available for members to borrow.

# Interview with Tim Costello

In January Philanthropy Australia's Louise Arkles spoke with Tim Costello, CEO World Vision Australia, about the post-Tsunami relief effort, Australians' giving overseas, and the role of foundations in overseas aid.

How do you reconcile the tension of giving overseas when there are marginalised and disadvantaged people within our own country? Do you see a tension?

No, not really. I say that you learn to be charitable only at home – if you can't respond to the poor in your neighbourhood, your nation, you will never develop an ethic that's charitable. But just as charity begins at home it must not end at home, because absolute poverty is not known at home, even in indigenous communities. Absolute poverty is 30,000 kids dying every day from dirty drinking water, dying from malnutrition, who are simply too poor to live. It is largely a matter of luck as to which latitude you are born on. In some countries your destiny is set from birth.

The majority of Australian philanthropic foundations have, to date, confined their giving to Australian shores, whereas many individuals and corporations give overseas as well as to local concerns. Is funding overseas something Australian foundations ought to be doing?

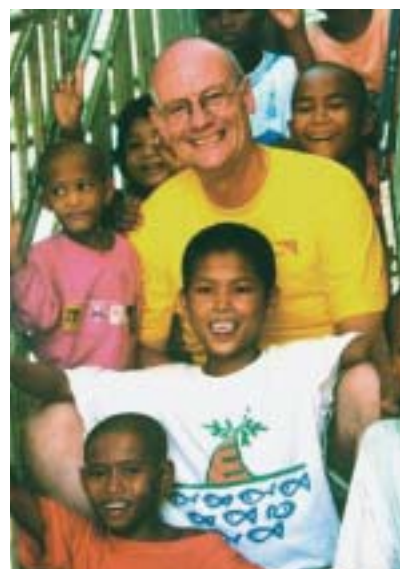
Absolutely. I think a foundation might have a principle of giving back where it makes its money, but most foundations should also tithe say 10 per cent to those who are absolutely poor because the moral claim is just so overwhelming. We now live in a global village, and we've got to have a global ethic. We can't avert our eyes and say "my duty is only to those close to me". Ethically there is no reason to discriminate between suffering people here or in Africa, for example. Foundations might look at how they can amend their trust deeds to allow for giving overseas.

Is it a legitimate role for foundations to form a bridge for international relationship building?

In the United States something like 98 per cent of philanthropic funds are spent within that country, the richest nation in history. One bind this creates is that it allows the government off the hook, giving massive tax cuts to high earners and expecting foundations and churches to run the soup kitchens and feed the hungry. So I think when you get an international perspective, you are more likely to ask "what should we expect governments to be doing?" After governments have fulfilled their responsibilities, then we can then look at how we can support people in need. Therefore I support building that bridge.

In the United States the debate around funding administrative costs is back on the agenda, with several foundations declaring this as their focus. Is this a debate we need to have in Australia? How do we encourage donors to fund administrative costs?

Most of the people who have set up a philanthropic foundation ran a business, they understand that overheads and administrative costs are inevitable and essential, so it's hardly a strange and foreign notion that every charity has administrative costs. I once had someone give me a cheque on the condition that 100 per cent of it goes to Africa. I said "Alright. I'm going to send it to a post office box in Africa." "But how do I know then that it's actually going to be used properly?" "Ah, well if you want to know that, you'll have to pay for it." That's administrative costs – monitoring, evaluating, auditing. Every donor who wants lower and lower overheads is really only focusing on one issue –



*Tim Costello visiting a drop in centre for street children in Phnom Penh.*

overhead costs – but the real question is effectiveness – "Is my dollar making a difference?"

To get that message out, we have to avoid allowing charities to simply compete with each other on the sole question of how low their overheads are, when we do that we shoot ourselves in the foot. This goes back to education of NGO's and of donors.

There was concern after the Tsunami that there might be a negative impact on Australian charitable organisations, that people might then not give to other needs, but it seems this has not occurred.

No, I think that what the Tsunami showed most Australians is that they have far greater capacity to give than they thought. I might think things are tight, and that my kids need a mobile phone or a widescreen television, but actually

I can postpone those things and give. The fact that there wasn't a rain-shadow over donations after the Tsunami was terrific for local charities.

**What about the Pakistani earthquake – how have you felt about Australia's response to that disaster?**

The Tsunami was so far off the scale that everything afterwards is dwarfed. The Pakistani earthquake response has been in line with our other appeals, in terms of levels of giving. Why is it not like the Tsunami? To be blunt, no Australians died, no westerners died, so there's not a story here. That's a strong contrast to the Tsunami. We aren't touched in the same way.

**What do you think the large aid agencies can learn from the experience of the Tsunami?**

I think the emergency response from the large agencies was excellent. We have learnt from the failure in Rwanda, in that we had to move quickly and we couldn't just wait for bureaucracy and for permission. The lesson then is: at what point do you pull back the relief people, who necessarily have to be authoritarian, cowboy can-do types, and make sure the development people who listen and consult come in? So it's a timing issue, of when to move the relief people out and get the community-based people in – we didn't always get that timing right.

**At one point post-Tsunami Medicine Sans Frontier said they had enough money, and stopped taking donations. At what stage do you foresee an Australian aid organisation reaching this point?**

I'd encourage agencies to do that if they don't have capacity. If you're simply raising money in order to start up from scratch I don't think that's a good idea. The large agencies can manage more funds because they have the capacity – World Vision has been in Indonesia for 40 years and Sri Lanka for 25 years, we have 400 Indonesian staff and 200 hundred Sri Lankan staff – so our capacity was very great. My view is that we need fewer agencies, more joint

appeals and more cooperation. Having said that, smaller agencies that focus on what they do best, their core business, who reach a point where they say they have enough money to work to their capacity, I think that's fantastic – very commendable.

**What would you see as the next developmental stage in the maturing of the charitable sector in Australia?**

The next stage is getting the Australian mega-rich, those on the BRW Rich List whose assets went up by at least 10 billion last year (foundations' assets didn't go up by anywhere near that proportion!) to give. We want to see more of these people giving more generously.

Australians need to develop an ethic in which the whole purpose of creating wealth is to give back – it's "the man who dies rich dies disgraced" ideal – which isn't a culture that we, by and large, have here. In America it is helped by the fact that there is an estate duties tax. We don't have those death duties,



Probably not. I think the Tsunami was 'off the scale' in every degree, and corporates were literally tripping over each other to present their cheques. Why? Because there was shareholder and community expectations of them to do something. Without that pressure I'm not at all convinced corporates would keep giving to that degree. We didn't see them doing it for Pakistan. Though they're starting to get better at giving, it's by no means part of the culture. All of us need to speak out and say 'that was great', we need to keep the pressure on.

"The lesson then is: at what point do you pull back the relief people, who necessarily have to be authoritarian, cowboy can-do types, and make sure the development people who listen and consult come in? So it's a timing issue..."

we don't have the tax structure which creates a greater incentive to be philanthropic. I think those things all need to be considered. The introduction of Prescribed Private Funds was a step in the right direction.

**The corporate response to the Tsunami seemed to be very positive – a lot of corporates gave very large donations. Do you feel that is going to carry through to a sustained giving program?**

**Do you have any other comments to encourage donors to give overseas?**

I think that so many young Australians now travel that we actually recognise that our ethical duties don't stop as we fly across the Australian border. The experience of the Tsunami showed us that Asia is where we're trading, holidaying, learning languages – this is our neighbourhood. That's the big shift, which hopefully will mean that corporates, major donors, in fact all people who are philanthropic will keep giving to our region.

# From global to local – Foster's in the Community

By Robyn Vale

What do water buffalo in Vietnam, and a group of impressively moustachioed Sydneysiders have in common? Both are snapshots from the Foster's Group's corporate philanthropy program, Foster's in the Community.

Last year, *Australian Philanthropy* reported on Foster's Group's response to the Indian Ocean Tsunami. Then, their new community program was in development and unnamed. Building on the experiences of the Tsunami response – that an effective program needs to be inclusive, engaging and strongly led by senior management – the principles and structure of Foster's in the Community were developed after extensive research with Foster's Group staff internationally. The research was to identify the broad areas of interest that staff wanted to see supported, and to identify what they as individuals were already doing within their own communities.

The result? A program that focuses on three core areas:

- wellness: supporting projects that promote good physical and mental health;
- culture: supporting artistic and cultural endeavour; and
- environment: supporting projects that benefit the natural environment.

The program has three elements: responsible drinking, employee involvement and community partnership. These three elements are consistent across Foster's Group's international operations.

## **Responsible Drinking initiatives:**

As an international beverage company, Foster's Group is keenly aware of its community responsibility to promote safe consumption of its alcoholic product. Under the slogan 'enjoy responsibly', guidelines and tools for every community activity, from marketing and sponsorship to employee involvement projects and

community grants are employed by Foster's Group to meet this responsibility.

Employee Involvement projects are not limited by the three corporate priorities listed above. Such projects include local community grants of up to \$500, where a Foster's Group employee (or their immediate family) is involved in a community project as a volunteer or fundraiser. (Hence the water buffalo: an employee who was an active fundraiser for Oxfam nominated this project as one worthy of funding).

Payroll giving is another element, where Foster's Group facilitates pre-tax deductions and charitable donations on behalf of employees, covering administrative costs to ensure 100 per cent of employee donations arrive where targeted.

Foster's Matched Giving is where the moustachioed men come in: a group of Foster's Group employees in Sydney (and some in South Australia) wanted to raise money for prostate cancer. They devised a project called 'Movember', a competition to grow the most impressive moustache. The idea comes from the employees, the Company provides the tools to help organise it, and a dollar for every dollar the employees raise. The result of Movember was \$45,000 for prostate cancer research (and a lot of laughs along the way).

A volunteering program, which already operates at a local level, is in the process of being expanded and formalised.

Under Community Partnerships, Foster's in the Community establishes local, state and national partnerships

with community and charitable organisations active within the three core areas: wellness, culture and the environment. It continues to provide sponsorships in the traditional sense, and launched a new community grants program simultaneously in Australia, the United Kingdom and the United States on March 1. Priority will be given to projects in those communities where Foster's employees live and work.

Foster's Group Community Relations Manager, Scott Delzoppo, is based in Melbourne. He explained that text messages and email kept the organisation in touch across the globe. They have also developed non-electronic promotional material for those areas where such devices are not in common use; provided bilingual promotional material in the United States, where most Foster's Group employees are Spanish speakers; and recruited community ambassadors at as many job sites as possible to spread the word.

Foster's in the Community is a program that essentially appears to be a global application of a local, community-based philanthropy. It remains flexible enough to respond as needed to local, national or international disasters. The program's capacity to provide funding, even for projects beyond Foster's Group's natural areas of interest, is expandable, depending on the breadth of the commitments and interests of its employees around the world.





# Healthcare companies working together in Papua New Guinea

*Compiled by Louise Burton, on behalf of the Collaboration for Health in Papua New Guinea*

The HIV/AIDS situation in Papua New Guinea is tragic, with estimates of as many as 69,000 individuals being HIV positive.

The Collaboration for Health in Papua New Guinea (CHPNG) was established in 2001 as a philanthropic initiative by a number of Australian pharmaceutical companies. Today, the group comprises Boehringer Ingelheim, Gilead, GlaxoSmithKline, Merck Sharp & Dohme and Pfizer Australia all working together through an informal consortium to help improve the health and well-being of Australia's nearest neighbour.

The consortium's first major activity was the 'International Roundtable on Increasing Access to HIV Care, Support and Treatment', held at the Australian National University in September 2002. Multidisciplinary teams from 13 Asia Pacific countries looked at case studies of successful approaches to HIV care and support in resource-poor settings. The Roundtable was funded by the consortium, together with AusAID, UN agencies, and international NGOs<sup>1</sup>.

The Roundtable demonstrated that action was often best begun on a small scale; building on existing HIV care and support. It also reinforced the importance of involving those infected and affected by the epidemic.

In February 2003, the CHPNG was formalised, adopted a charter and restated its commitment to work in close consultation with partners.

The CHPNG faced some critical challenges – working collaboratively within a competitive industry; protecting the philanthropic nature of the work in a sceptical environment; and ensuring good development practice with limited resources.

The group determined that all members' philanthropic activities in PNG would be part of the CHPNG, while remaining initiatives of the particular companies. Member companies agreed to keep other CHPNG members informed of their activities, through consultation and joint planning structures.

A Senior Adviser with extensive development and HIV expertise, Elizabeth Reid, was appointed to

manage the philanthropic funds and to establish and manage the partnerships.

After extensive consultations, three ventures started in 2003-2004<sup>2</sup>:

- Strengthening the role of day care and drop-in centres for people living with HIV. National Association of People Living With HIV/AIDS (NAPWA) and a range of PNG partners were involved.
- Strengthening the capacity of healthcare teams for HIV care, and piloting them across the country. This was undertaken with the Australasian Society for HIV Medicine (ASHM) and a range of PNG partners.
- Material support to Port Moresby General Hospital, a gift program.

Three pilot workshops were held, with multidisciplinary teams of healthcare workers from across the country, together with senior management. These workshops were expanded in 2005 and are planned to continue in 2006.

So far more than 175 doctors, nurses, health administrators, counsellors, and lab technicians have attended the workshops, which included sessions on the natural history of HIV infection, protection in and outside of the workplace, the involvement of family, and clinical, nursing and counselling care.

Maggie Herman, a Health Extension Officer at the Rebihamul Urban Clinic at Mt. Hagan, said the workshops helped her understand the importance of team building and networking in HIV care. She went on to create a care network across the Western Highland region. Maggie is confident the network will help her team spread the message about HIV prevention and care more effectively.

"After the workshop, I became more interested in the spiritual, social, physical and psychological needs of people living with HIV, as well as their care," she said.

The partnership model has enabled the skills and resources of many Australian individuals and organisations to be fully utilised and allowed similar partnerships



*Workshop for building the capacity of healthcare teams.*

to be built throughout PNG. It has also ensured that the skills of local people are fully valued and used.

"Our commitment is by no means a complete solution – indeed, no single organisation, government or company will solve this problem alone. It is only by working together in the CHPNG, that we can make an impact on this emerging epidemic in our closest neighbouring country," explained John Young, Chairman of the CHPNG and Regional Director of Pfizer Australia and New Zealand.

The CHPNG has shown that cooperation within a competitive industry can be achieved. CHPNG has contributed not only to the health and well-being of the people of PNG, but to a sense that the nation itself is shaping a distinctly collaborative response to the HIV epidemic.

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1. <http://www.hivroundtable2002.virtual-asia.com/index.htm>

2. CHPNG members by 2004 were Merck Sharp and Dohme, Boehringer-Ingelheim, Pfizer Australia, Bristol Myers Squibb and Aventis. Bristol Myers Squibb and Aventis later withdrew and in 2005 Gilead joined and now in 2006 GlaxoSmithKline.

# Philanthropy beyond Australian shores: Australian income tax considerations

*By John Emerson, Freehills*

This article comments in broad and introductory terms only, on the main Australian income tax considerations affecting individuals, corporates, and philanthropic foundations making gifts or grants for purposes outside Australia. The rules are particularly complex with regard to certain charitable philanthropic foundations.

## Individuals

Individuals can claim deductions against their assessable income in the particular year for gifts of cash, or of property valued by the Australian Valuation Office at more than \$5,000, to overseas aid funds endorsed as deductible gift recipients for the relief of people in developing countries. About 100 of these funds exist and in partnership with local organisations in developing countries, carry out relief programs. Examples are World Vision of Australia Overseas Aid Fund, Save the Children Fund Australia, and Medecins Sans Frontieres Australia Overseas Aid Fund.

Some environmental organisations carrying out activities outside Australia in relation to the preservation and protection of the natural environment are also endorsed as deductible gift recipients.

The only other deductible gift recipients for overseas purposes are the 13 or so specifically named in section 30-80 of the Income Tax Assessment Act 1997. These include the United Israel Appeal Refugee Relief Fund Limited.

## Corporates

Gifts made by corporates to overseas aid funds and environmental organisations endorsed as deductible gift recipients and to the specifically named international affairs organisations are also deductible as above.

In addition, if a corporate makes a sponsorship type payment to a not-for-profit carrying out activities overseas, and it is genuinely made for

business purposes, it will generally be entitled to a deduction for the payment, whether or not the payment is to a deductible gift recipient.

The claim would be made under the general business deduction section 8-1 on the basis that it is incurred in gaining assessable income or carrying on business for the purpose of gaining assessable income. The corporate would characterise the payment as one made for, say, business development purposes – to attract customers or enhance staff loyalty.

If there is no genuine business reason to make the payment, as objectively reasonably assessed, it may not be deductible. For example, a company operating three taxis would have difficulty claiming a deduction as its profile as a good corporate citizen is unlikely to be materially relevant to its taxi business.

The payment will also not be deductible if it is of a capital, private or domestic nature – e.g. made to establish a corpus for a new charitable fund.

## Philanthropic foundations

Since 1 July 1997, many philanthropic foundations pursuing any overseas purposes directly or indirectly have been required to take great care to ensure that their own income remains exempt from tax.

The relevant conditions for tax exemption in respect of grant making charitable foundations are outlined in section 50-60 of the Income Tax Assessment

Act 1997. Some aspects of the section are complex and mistakes are not uncommon for foundations that do not fall within a total 'safe-harbour' category – see below.

Taxation Ruling 'TR 2000/11 – Income Tax: Endorsement of Income Tax Exempt Charities', provides details of the exemption conditions in paragraphs 29 to 38 and 69 to 85. The ruling can be found by searching the Legal Database on the Australian Taxation Office website – [www.ato.gov.au](http://www.ato.gov.au)

In addition, a comprehensive paper on the issues, 'Charitable institutions and trusts – income tax issues', is available for download on the Philanthropy Australia website.

Some types of foundation need not be concerned with section 50-60. These types include foundations having deductible gift recipient status as prescribed private funds or ancillary funds, and foundations established by will before 1 July 1997 where no assets have been given to them after 1 July 1997.

The legislation can cause considerable difficulties for foundations which do not fall within a 'safe-harbour' category. Professional advice as to the applicability of the legislation should be obtained where there is no applicable 'safe-harbour'. The consequences of failing to satisfy a condition on even one occasion technically results in a permanent loss of tax exemption and possible personal liability to the trustees, directors etc.

# When a desire to give is not enough

By Robin Hunt, Chairman, Sunshine Foundation

Trustees of the Sunshine Foundation were interested in assisting with Tsunami relief but taxation matters got in the way. The situation was exacerbated by the time of the year – New Year close down – and our inability to get tax and legal advice.

Some trustees were concerned about the public image of certain Australian-based NGO's due to the handling of overheads in previous appeals for local and overseas aid. This was an unwelcome complication.

I was cognisant that under Australian tax laws, we could only donate via the few charities which were endorsed to support overseas projects. I tried to find out which charities had this status and approached the Taxation Office – albeit during the holiday period – for advice. The ATO Duty Officer stated that several familiar charities were able to accept donations for overseas destinations but that others – including some 'big names' – were not eligible. The latter would have been quite a shock to those organisations. Just as well they didn't know!

Using the ATO advice, I then attempted to approach several charities to confirm their status but continually found that their telephones were answered by temporary staff not familiar with abstruse matters such as tax status. The option of using websites was irrelevant when attempting to seek this sort of information. Even when I managed to speak to managers/executives of the agencies concerned (and we are talking about some very familiar names), they were unable to tell me their status or produce copies of the relevant ATO certificate/s.

I also raised my concerns with Philanthropy Australia and, even though it was the holiday period, Louise Arkles

made a great effort and, some time later, the desired advice was obtained. Interestingly, some of the information so obtained from the agencies clashed with the advice I obtained from the ATO. The dilemma then arose out of the conventional wisdom that an entity's tax status was a matter subject to the Privacy Laws and could not be made

covered 'animals' – even though there is a world-wide peak agency that is chaired by Australian Dr Hugh Wirth). In time, the major agencies announced that they had adequate funds and they also expressed concern lest continuing fund raising for the Tsunami disaster reduce funds to on-going 'routine' projects.

"One change for the better has been the initiative by the ATO to provide tax status information on their website for a large number of charities."

public – even though this would have led to an increase in donations. The updated ATO website (see below) now overcomes this.

Philanthropy Australia arranged a briefing in Melbourne in mid February 2005 with the Indonesian Ambassador Cotan in attendance. Several Philanthropy Australia members expressed interest in supporting 'non traditional projects' such as injured animals (companion and domestic), women's issues, tsunami warning systems and the provision of mobility aids. We were told that none of these aspects were being met by the initial endeavours of the major agencies. Unfortunately, there didn't seem to be a way of using the 'approved' agencies that under tax laws were able to support overseas activities to assist activities such as these (example: none of them

At about this time, Sunshine Trustees saw the Tsunami situation as 'too difficult' and turned to support other projects.

One change for the better has been the initiative by the ATO to provide tax status information on their website for a large number of charities. This would have solved a major problem at a time information was hard to obtain (i.e. early in a New Year).

*Australian Taxation Office DGR page*  
<http://www.ato.gov.au/nonprofit/pathway.asp?pc=001/004/006/008/003>

*Information on the DGR status and other tax concessions of organisations is also available from ABN Lookup*  
<http://www.abr.business.gov.au/>

# Australian perceptions of Asia

While a number of Australian organisations and businesses are building successful partnerships of mutual cooperation in the Asian-Pacific region, general Australian perceptions of our neighbours remains uncertain. Dr Michalis S. Michael, from the Melbourne-based Centre for Dialogue, examines this sometimes fraught relationship.

In 2005, a young Australian standing outside the Denpasar court where Schapelle Corby had just been sentenced to 20 years in jail, angrily called on the Indonesian president to recall how Australia had helped his country during the Tsunami disaster.

This message – rehashed on talk-back radio – reverberated through suburban Australia, to create a tidal-wave of public protest and a call for Australia to ‘reneg’ on its billion dollar aid relief to Indonesia in light of the Corby verdict. Many Australians, according to a Melbourne Age poll, felt that the federal government should have pressured the Indonesians with the ‘aid card’ to get Corby back home.

This attitude contrasted starkly to the mood that prevailed in Australia in the wake of the worst tsunami in recorded history. Immediately after the Tsunami there were high expectations that somehow the sheer magnitude of the disaster would have a far reaching effect on our attitudes to the Asia-Pacific region. Somehow attention, resources and discussion would swing away from traditional (military) notions of security and move towards ‘human security’ – where the protection of people, not territory, becomes the prime directive.

However, in less than six months Australia’s mood of generosity and solidarity towards our region had been replaced for many by bitterness and anger. The Corby incident revealed that for many Australians our aid was somewhat conditional, and there was an element of resentment about the apparent ungratefulness of the recipients of our largesse.

The Corby affair is not the only occasion that has degenerated into an Australia versus Asia dispute. Every time there is an incident involving Australians or Australia’s national interest (e.g. Singapore’s hanging of Australian Nguyen Tong Van, the SARS virus scare, the Asian economic collapse), our collective perception of the region is amplified. Over a long period of time our reaction to these events not only forms a disturbing pattern, but aggregates into a national fixation for perceiving the Asia-Pacific region as a theatre of threat or danger zone.

Any attempt to summarise Australian perceptions of the region, and more generally how Australians relate to the rest of the world, is difficult to quantify. Relying on selective and generalised opinion polls, anecdotal information, and socio-psychological profiling, we need to bear in mind that Australian views of the region are neither static nor uniform.

Today, Australia finds itself as one of the dominant developed countries in the Asia Pacific region. Relations, especially economic ones, have deepened enormously since the 1960s. But mutual understanding is not necessarily widespread. A large part of this problem lays in the fact that Australia remains on the cultural and political periphery of the region: an outsider looking in.

The perception that the region poses a threat to Australia is nothing new. Most of Australia’s history is characterised by fear of an (Asian) invasion. A 2000 newspann revealed that 60 per cent of

those polled believed that Australia was inadequate in defending its national interest against a military threat.

Australia’s history is littered with perceived threats from the region: the ‘Red Menace’, before that the ‘Yellow Peril’, and now the perceived threat of an ascending China and a growing fear of our large Muslim neighbour Indonesia.

The ‘war on terror’ has provided another layer to our national insecurities. Australia’s response to this sense of threat has been to reaffirm and strengthen its reliance on the United States to the extent that Australia has come to be seen as a regional deputy of the United States. This is a role that further distances us from many of our Asian neighbours.

That is why there is a desperate need for dialogue that focuses on the multiple relationships that Australia shares with the region. This dialogue must be held at various levels and between various agents in our societies.

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# Is strategic giving always better?

## Lessons from the Asian Tsunami

*By Denis Tracey, Deputy Director, Asia-Pacific Centre for Philanthropy and Social Investment, Swinburne University*

The Asian Tsunami might have been the greatest natural disaster in the last century: it was certainly the most widely-reported.

The reaction around the world was also virtually unprecedented. Governments, NGOs, aid agencies, corporations and individuals donated money and goods in astonishing levels. Medecins Sans Frontiers eventually asked people to stop sending money.

Governments too were quick to respond, though many seemed unsure how much was appropriate. The Australian government, after first committing \$10 million, had, by mid-January 2005, raised this to slightly over \$1 billion. State and territory governments provided a further \$17 million. At the time, some people commented that governments seemed to have been encouraged by their citizens' generosity.

The response by corporate Australia was also impressive and for a few weeks it seemed that a competition was under way. Richard Pratt, Dick Smith, Qantas, and Fosters all committed to donate \$1 million. The three commercial television channels joined forces to present a telethon appeal that raised about \$20 million.

The Australian public donated about \$190 million, mostly in gifts to the larger aid agencies such as World Vision, the Red Cross and Oxfam Community Aid Abroad.

It seems to me that the key thing about all this was its spontaneity. If we see someone fall down in the street we run to help, more or less instinctively and without thinking too much about the possible consequences. Our reaction to the Tsunami was much the same; reactive, non-strategic and, I believe, entirely virtuous.

On 19 February 2005 I was interviewed for *MX* (a newspaper distributed free to Melbourne commuters). Asked



*Photograph courtesy of Foundation for Development Cooperation, taken by Beris Gwynne.*

why Australians felt so compelled to contribute to this appeal, I identified three factors.

- The Tsunami crisis is politically and morally unambiguous. There can be no suggestion that it was the result of human action. Australians know that the misfortune is undeserved and unjust and they want to make a difference.
- The crisis occurred at Christmas when people were more focussed on giving and were more inclined to make a donation (I might have added here that the media was less distracted by other issues).
- The tragedy happened in our neighbourhood and affected a region that many Australians have connections with. We have travelled in Thailand and watched India and Sri Lanka play cricket.

Acts of giving can be expressed in a sort of continuum which runs from pure altruism to frank self-interest. At each step we can usually detect an increased level of strategic planning.

In our society I think there is a feeling that altruistic giving is somehow more virtuous, and this also made the Tsunami appealing: we saw a need, we knew we could help and we acted. Grantmakers often remind one another that it is

better to give a net than a fish. But the philanthropy that followed the Tsunami was reactive and non-strategic. Was it therefore somehow inferior?

I don't think so. To someone in the direct need, a fish (and a fire to cook it on) is exactly what is most needed; that and a blanket, a tent and access to clean water and medical attention. Certainly there is a role for more carefully-planned and strategic gifts, but these are little use if the intended recipients have died of cold and hunger.

In the courses we teach at Swinburne University we recommend a number of questions that grantmakers should ask. Is this cause or project needed? Is the applicant the appropriate person to do it? Are the costs reasonable? How will its success be judged?

We also recommend a process of evaluation in which outputs, outcomes and impacts are carefully identified and examined.

It is inevitable that decisions made in a hurry are less likely to be perfect than those made after painstaking reflection, and in recent years we have seen a number of respected agencies criticised over decisions they made. However, I believe it is wrong to look down on charity, especially in urgent and unforeseen circumstances.

# Supporting women after disaster

The Global Fund for Women released a report in December 2005 showing how women are disproportionately at risk during and after natural disasters.

The report, entitled *Caught in the Storm: The Impact of Natural Disasters on Women*, was written by Lin Chew and Kavita N Ramdas. Estimates reveal that approximately three times as many women as men died in the 2004 Tsunami. Data from Pakistan also indicate that more women than men were killed in the October 2005 earthquake. The report includes recommendations for relief groups, non government organisations, and government agencies to implement before, during and after crises, including the following.

## Include women in pre-and post-disaster planning.

Plans made by relief agencies should include the input of local women leaders and organisations. Emergency plans must include strategies for dealing with children who have been separated from their families.

## Keep women safe.

Relief agencies must create safe space and facilities for women, to prevent violence and rape post-crisis.

## Protect girls' education.

Schools must be relocated and rebuilt quickly, and women trained to be teachers, to enable girls, who are already disproportionately deprived of education, not to fall behind.

## Target women's health needs.

Agencies must make special efforts to address the specific health needs of women in disaster situations. This includes providing suitable bathrooms, undergarments, sanitary supplies and prenatal and maternity care. Women and girls must be provided with culturally appropriate clothing.

## Help women become self sufficient.

Relief efforts must include long term income generating projects and or jobs for women, whose livelihoods and or key providers have been lost, so they may provide for themselves and their families.

## Ensure equal aid distribution.

Women and children account for more than 75 per cent of displaced persons following natural disasters. In addition to providing safe temporary housing, permanent housing and land rights must be secured for displaced women.

The Global Fund for Women is the largest foundation in the world that focuses exclusively on advancing women's rights internationally. Grants made by the Global Fund expand the choices available to women and girls, securing their efforts to strengthen economic independence, increase access to education and prevent violence.

Since 1987, the Global Fund has awarded over \$44 million to see, strengthen and link nearly 3,000 groups in 162 countries.

"Grants made by the Global Fund expand the choices available to women and girls, securing their efforts to strengthen economic independence, increase access to education and prevent violence."

## Bring women into all decision making processes.

The months when villages, nations and regions work to rebound from disaster hold the unique promise of longer term social and structural change that will improve women's lives well into the future.

The Global Fund for Women provides long term support to local groups in regions affected by natural disasters with grants that help communities rebuild, prevent sexual violence, and ensure that women and children are accorded their full human rights.

*Reprinted with kind permission from the Global Fund for Women. Read more or download the report (PDF): <http://www.globalfundforwomen.org/work/programs/natural-disasters.html>*

*More information about The Global Fund for Women can be found at: [www.globalfundforwomen.org](http://www.globalfundforwomen.org)*

The articles in this issue of *Australian Philanthropy* offer some challenging ideas which we hope will inspire further thought, comment and possibly disagreement! We are keen to hear from our readers, and welcome letters relating to any issues covered in our journal. Please email your comments to Louise Arkles at [l.arkles@philanthropy.org.au](mailto:l.arkles@philanthropy.org.au)

# Taking disaster response seriously

*By Terrence R. Meersman, Executive Director of the Seattle based Talaris Research Institute*

*This article was first published as a letter to the editor in the United States fortnightly publication The Chronicle of Philanthropy, 12 January 2006. Website: <http://philanthropy.com>. It is reprinted here with permission from The Chronicle of Philanthropy and from the author.*

Foundations are expected to provide rationality and solutions to the major challenges of our time, but they have failed when it comes to dealing with natural disasters and humanitarian emergencies.

It is not that they have failed to invest, though perhaps they have not invested enough. The real problem is that grant makers have failed to do their homework on what it takes to strengthen the disaster-response system and to focus their investments wisely.

When the intensity or duration of national headlines and television coverage persuade foundations to support disaster relief, grant makers are often driven by compassion, embarrassment, or pressure from their boards rather than by an understanding of the problem and a hypothesis about the solution. As a result, they usually make grants to reputable organisations that provide immediate relief and make a large difference in curbing human suffering. But the money seldom goes to efforts that deal with the underlying problems that led to the crisis or that help to build the field of emergency response.

In fact, foundations seldom recognise that disaster response is a field, and a major one as measured by the economic and social impact of disasters as well as the size of contributions, especially those provided by governmental sources. To be sure, we just closed a year that was unusual in the frequency and severity of the disasters. But in 2006 and every year to come, thousands of people around the globe will lose their homes, their possessions, their means of subsistence – and often their lives – due to scores of natural disasters as well as humanitarian crises caused by war, political strife, and other challenges. International organisations spend billions

“The first step in developing a more thoughtful and effective response to disasters is to recognise that a disaster should not be defined by an unexpected event but by the failure of a community to respond to that event.”

annually dealing with those tragedies. The causes of those emergencies are often complex, as are the responses. But well-timed, well-focused philanthropic contributions can make an enormous difference.

The first step in developing a more thoughtful and effective response to disasters is to recognise that a disaster should not be defined by an unexpected event but by the failure of a community to respond to that event.

Many emergencies – local, national, and international – never become disasters that require outside assistance because

organisations in the region are equipped to deal with the situation. Foundation support for a disaster should focus on the causes of the breakdown of a community's ability to respond to a crisis.

Some disasters, such as the Pakistan earthquake and Hurricane Katrina, destroy a region's physical infrastructure, making it impossible for any local organisations to provide emergency relief without significant external help. In other cases, such as the death of almost an entire generation of parents in parts of Africa or the flight of community leaders in New Orleans, the social system breaks down to the degree that little



*Photograph courtesy of Foundation for Development Cooperation, taken by Beris Gwynne.*

of the traditional community leadership is left to cope with significant problems. In other cases, such as ethnic-cleansing campaigns against civilians, the psychological or moral identity of a community is so damaged that its traditional resilience and values system fail.

Developing a strong understanding of the types of damage that a region has sustained often does more than just provide a road map to an effective short term response; it can also reveal opportunities to support longer term programs that can help assure that a region has the capacity to respond to many types of disasters.

Muhammad Yunus, founder of the Grameen Bank in Bangladesh, told me recently that his only surprise in the Katrina response, compared with the many emergencies and disasters that affect Bangladesh every year, is the weakness of the response by civil society.

During a major emergency in Bangladesh, he said, branches of the Grameen Bank, which makes small loans to help people start businesses, cease their banking business and become information centres that help relief organisations plan how they will help those harmed by a disaster.

If foundations could help private organisations of all kinds demonstrate that kind of agility in their response to disasters, grant makers could multiply many times the impact of their financial support.

Foundations can also shape a disaster response by the timing of their grants. Nonprofit groups that respond immediately often set the priorities for the relief and rehabilitation phases of dealing with a disaster. Early foundation-assisted action by expert organisations can direct vast resources in a more thoughtful direction instead of waiting for donors, charities, and governmental bureaucracies to trudge slowly to the recognition of what is needed.

Another way in which foundations can make a difference is to help first responders identify and publicise

significant disasters well before they hit the headlines. That is especially true of crises that set in slowly, like ethnic cleansing and droughts.

Major droughts and resulting food shortages in Ethiopia and Zimbabwe barely saw the light of day in the American news media compared with the Tsunamis in Southeast Asia and Hurricane Katrina.

It is not unusual for relief organisations to see disasters coming many months in advance, and then to wait in frustration while the news media, donors, and governments let them evolve into full-blown crises before responding. But in a few instances, quick action by foundations and other donors has helped avert trouble.

“Many emergencies – local, national, and international – never become disasters that require outside assistance because organisations in the region are equipped to deal with the situation.”

A major commitment from philanthropy to one of the ‘quiet disasters’ – the type that does not get five days of coverage in *The New York Times* or CNN – can carry much greater influence than adding to the coffers of a well-financed response to a well-known tragedy. But learning about those quiet disasters requires vigilance and timely work by the staff members of foundations.

Beyond the help the foundation can make directly, responding to the less well-known disasters has a multiplier effect because other foundations, as well as companies, journalists, and philanthropists, pay attention to what big grant makers are doing.

Disaster money comes and goes. When disasters are out of the news, money dries up precipitously. Often the regions that have suffered through

a crisis are left on their own when short term assistance disappears.

Foundations can help balance this predictable cycle by focusing their grants on longer term rehabilitation needs. They can also make grants to programs that deal with the causes of a disaster by investing in a region's resilience – physical, social, and civic – to prevent the next emergency from becoming a disaster.

What's more, foundations can support the capacity of disaster-response organisations during periods when large disaster grants are not being given, thereby preventing the cyclical ‘boom and bust’ reality of organisations that essentially need to rebuild much of their response effort each time an emergency occurs.

The disasters of the past year demonstrated the enormous opportunities for philanthropy to take a leading role in shaping the field of national and international emergency response. As a field, it has been virtually untouched by what philanthropy can offer. Let's resolve in 2006 to make sure that this is no longer the case.

*Terrence R. Meersman is Executive Director of the Talaris Research Institute, a Seattle nonprofit group that seeks to improve the relationships between parents and young children. He was previously a vice president of Save the Children and has worked at several foundations, including the Bill & Melinda Gates Foundation and the Pew Charitable Trusts. He lived and taught high school in Melbourne for four years. He hopes this article can stimulate some new thinking and new ways of giving.*



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