



PHILANTHROPY  
*Australia*

# Australian Philanthropy

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Doing Philanthropy  
Differently



# Doing Philanthropy Differently

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# From the President

*Bruce Bonyhady, President*

The factors that are on Grant and Crutchfield's list of key drivers of success, and those that are not, are both very illuminating.

I found the first two conclusions especially incisive. However, from a philanthropic perspective they are very challenging because as philanthropy looks to partner with the highest impact organisations the boundaries between influence, voice and advocacy and what is philanthropy and charity at law will be questioned and reshaped, as will the boundaries between for profit and not-for-profit activities.

Equally interesting is the view from Grant and Crutchfield that size is not correlated with impact. This clearly challenges the simplistic assertion that the not-for-profit sector is inefficient because there are so many small organisations, while vindicating the view of many Trustees that philanthropy should support small as well as large community benefit organisations.

I would therefore recommend this book to Trustees and staff who are keen to explore concepts of 'new philanthropy', and better analyse and define the characteristics of potential partner organisations.

One of my personal favourite examples of new philanthropy is a partnership between Yooralla, Victoria's largest provider of services to people with disabilities, which I chair, and the Indian Institute of Cerebral Palsy (IICP).

This partnership is built on the pillars of planned and structured giving, selfless dedication, international collaboration and comparative advantage, social entrepreneurship and investment and technological innovation.

The results could revolutionise possibilities for people with communication impairments – worldwide.

In 2001 Yooralla's Chief Executive heard that the IICP was looking for less than \$15,000 to develop a new communication device to help people with disabilities. He was intrigued because Yooralla is a leader in augmentative communications and because a single piece of equipment can cost more than \$15,000.

He therefore carefully assessed the capacity of the IICP to develop new devices and came to the conclusion that IICP had access to some of the best Information Technology resources in India, at a fraction of the cost of employment in the US, Europe or Australia and so it may be possible to design and build a very low cost augmentative communication device.

Yooralla therefore decided to provide funding for an initial three year period. The financial resources and the expected outcomes were documented in a formal partnership agreement and to fund Yooralla's contribution, a payroll giving scheme was established.

Previously, Yooralla had not asked staff to donate their money towards people with disabilities, because the organisation already expects staff to work very long hours and often at low rates of pay. However, the prospect of a technology and cost breakthrough that would profoundly change the lives of thousands of people with disabilities inspired Yooralla's staff and they have donated more than \$43,000 to be invested in this technology project over the past seven years.

The IICP has developed a communication device which is battery operated and allows 48 messages to be pre-recorded and stored. The messages are stored in four layers of 12 messages each and special switching devices have been developed to enable anyone with poor hand control to operate their communication device.

The cost of each machine is very low: around \$100; and with a little further development, these communication devices will generate revenues for IICP through sales across India and the region. This income will then enable the IICP to expand its range of services which are desperately needed.

The success of this partnership, and potential depth of impact of this project, illustrate the power of new thinking in the not-for-profit sector, as it embraces new philanthropy, new global links, innovative technology and the power of market forces.

1. Forces for Good: The Six Practices of High-Impact Nonprofits by Leslie Crutchfield and Heather McLeod Grant, San Francisco: Jossey-Bass, 2008. Available for loan from the Philanthropy Australia library.

## **Gandhi said: "be the change you want to see in the world".**

This issue of *Australian Philanthropy* looks at some of the social entrepreneurship and lateral solutions which a new wave of Australian philanthropists are engaged in to benefit the Australian and international communities.

These very positive stories of social change illustrate that innovation is blurring boundaries between not-for-profit organisations, social firms and business; between the dissemination of information on social issues, influence and advocacy; and between giving, corporate social responsibility and philanthropy.

This sense of a landscape that is being reshaped and redefined has also been highlighted for me in a new book entitled *Forces for Good – The Six Practices of High Impact Nonprofits* by Heather Grant and Leslie Crutchfield<sup>1</sup>.

According to Grant and Crutchfield high impact organisations:

1. May start out providing great programs, but they eventually realise that they cannot achieve large-scale social change through service delivery alone and so they add policy advocacy to their core activities.
2. Learn that tapping into the power of self-interest and market forces is far more effective than appealing to altruism alone.
3. Build strong communities of supporters who help them achieve their larger goals.
4. Help their peers succeed, building networks of non-profit allies and devoting remarkable time and energy to advancing their fields.
5. Are exceptionally adaptive, modifying their tactics as needed to increase their success.
6. Have leaders who exhibit charisma while empowering others in order to build stronger forces for good.



“These newcomers have decided to build their ways of giving from the ground up – they’re not just redefining what it means to be a philanthropist, they’re changing the very shape of giving.”

## From my Perspective

*Gina Anderson, CEO*

Newcomers to the philanthropic sector are much like the philanthropists of the past in whose name the well known foundations were created. They are innovative, creative, highly skilled in their fields and risk takers. Like their predecessors, they are naturally bringing those skills that have made them so successful in business to bear on social, cultural and environmental issues. They are also bringing their own resources.

These newcomers have decided to build their ways of giving from the ground up – they’re not just redefining what it means to be a philanthropist, they’re changing the very shape of giving. In doing so they are not content to accept the status quo. As they learn about the not-for-profit sector, they are questioning current methods, seeking best practice and focusing on solutions rather than responding to crisis points. In keeping with their entrepreneurial personas, they do not necessarily see themselves as ‘philanthropists’, but rather as individuals who would like to do their bit for the community in which they live – often the global community rather than their immediate geographic area.

Traditional philanthropy can learn a great deal from these individuals. Their active engagement with issues, particularly when they give of their time and skills,

is often more valuable than the money they also donate. This group find the risks and problems and challenges faced by the sector really fascinating and creatively seek possible solutions. While they are prepared to take risks and support innovative programs, these people also bring a focus and a rigour to performance, measurement, metrics and evaluation.

The new philanthropist is also technologically savvy. Being time poor, they look for succinct information presented concisely online. Passing-on of wisdom then becomes a challenge for both the old and the new.

However, in their enthusiasm and passion to bring about change, those new to the philanthropic sector may sometimes disregard valuable lessons of the past. Examples where new philanthropists can learn a great deal from traditional philanthropy are many. Experienced philanthropists for example can provide guidance to newcomers on how to say ‘no’ to the overwhelming number of organisations seeking support.

The newcomers are business people who are used to having an ‘exit’ plan from the many deals they are involved with. However ending a relationship with a not-for-profit organisation, an

organisation which is mission-based with a myriad of stakeholders, is often far more complex and fraught if not properly managed. Again the experienced philanthropist has lots to offer those learning in this field.

In the main, new philanthropists are keen to make a difference through projects but many have shown a reluctance to be involved with policy and advocacy. Caledonia Foundation, featured on page 10, is one notable exception. Again, some of the more experienced philanthropists have supported not-for-profit organisations to build research capability, community facilitation and advocacy skills in their quest to make substantial change, not just at a program level, but at a policy level, thus changing the paradigm for all. This is difficult work because it is long term, taking five, 10 or even 20 years, often with little in the way of concrete outcomes until all of a sudden there is a tipping point, at which change suddenly happens. For example think of the environment and climate change, or the campaign to quit smoking.

And of course the more experienced the philanthropist the better their sense of the art versus the science of philanthropy.

# Getting to the change you want to see: moving beyond magic

By Diana Leat, author of 'Just Change: Strategies for Increasing Philanthropic Impact', and Research and Development Director of the Carnegie UK Trust

Over the centuries billions of dollars have been spent worldwide by philanthropists and foundations. In the face of such generosity, asking what has really changed seems ungratefully impolite. Clearly, some things have changed – and some have, equally clearly, not. So do foundations need to change for change? Do they need to do something new, or perhaps reinvent something old to achieve the change they want to see in the world?

## Root causes

In the 19th century foundations did 'charity', providing short or longer term aid to those unable to help themselves; longer term change was not a major pre-occupation. In the early 20th century some foundations concluded that charity was not enough. They wanted lasting change and the way to get to change was through analysis of causes of problems.

In the scientifically optimistic days of the early 20th century the dominant assumption was that if you could identify causes of a problem then solutions could be scientifically engineered. A small minority of the early large US foundations realised that engineering lasting solutions to social problems involved engaging with policy and wider social institutions.

## Demonstrations plus magic

As the 20th century progressed that realisation got a little lost (not least because of the fear it provoked in US government circles). Foundations generally retained an emphasis on 'innovation' but did not look too deeply at what sustainable innovation with impact beyond immediate grantees involves.

Very broadly, the dominant foundation idea of the latter part of the 20th century was that foundations demonstrate, and then by some magical process 'demonstrations' are avidly seized upon, implemented and scaled up by unspecified others.



At the end of the last century the venture philanthropists and social entrepreneurs gave the demonstration model a new, and very late 20th century, twist with their emphasis on 'capacity building', 'business savvy' and 'going to market'. What remains unclear is how such (labour intensive) demonstrations "magic" into sustainable change with impact beyond immediate grantees/partners.

## Getting to change

Meanwhile there are some foundations in the US, Canada, the UK and Australia – among other places – quietly getting on with systematically working towards the change they want to see. These foundations are skeptical about magic – though they recognize luck. They know that getting to change involves more than demonstration plus magic. So what do these foundations do to get

to the change they want to see?

One might expect that getting to the change you want to see depends on the nature and direction of the change you are seeking. In fact studies of foundations involved in effective social change, with impact beyond immediate grantees, are remarkably consistent in their findings. The methods of the neo-conservative foundations in the US are well documented, as are the methods of creative foundations seeking to stimulate creative conversation and debate without necessarily adopting an explicit political framework. More recently a study of UK and wider European foundations adopting a social justice perspective comes to very similar conclusions about how to get to the change you want to see.

This study, published in my latest book *Just Change: strategies for increasing philanthropic impact*, (available from Philanthropy Australia) tells the stories of how foundations contributed to longer term change in the rights of children in care, land reform in Scotland, the training of imams in Europe, disability rights, whistle-blowing at work, and working for peace in Northern Ireland.

The stories illustrate a variety of roles for foundations and analyse methods and factors in success. They entail different levels and types of risk and tell very different stories, but also reveal that while getting to the change you want to see is not rocket science it is also not 'business as usual'.

### Lessons from the stories

The case studies (and the wider research literature) demonstrate that there are no golden rules or magic bullets in achieving change with impact beyond immediate grantees. But there are some recurring themes in how foundations work and what they need to look for, and fund, in grant recipient partners if they want to contribute to achievement of wider, longer term impact. These strategies for getting to the change you want to see include:

- having clear values and a clear idea of exactly what the change you want to see would look like, and who or what has to change to achieve it;
- accepting the importance of opportunity and luck, and acknowledging that things change, often in unexpected ways; and this entails accepting that funding needs to be flexible to enable grantees to respond to change;

- recognising the importance of an evidence base and credible knowledge in today's policy environment, and being willing to fund research and active dissemination tailored to the needs of particular, identified audiences;
- providing 'smart' answers, in clear and simple messages that focus on the positive and the constructive. Constructive and feasible solutions are likely to have far more impact than carping about what is wrong;
- going to where the power to effect change lies, and working on different fronts. Too often foundations fail to think about how widespread social change happens – who or what has to change and how that can be achieved. Foundations need to question assumptions that 'change just happens' and/or that change can always be achieved from the bottom up. There is a difference between rooting suggested change in the

experience and views of those disadvantaged, and leaving it to them to achieve change alone; and

- developing the persistence and the maintaining the passion to get you through. Just as 'faint heart never won a fair lady' it seems that anything less than persistent and passionate commitment rarely gets you to the point of achieving sustainable change with significant impact.

One last challenge: getting to the change you want to see involves thinking beyond the tiny percentage of your assets you apply to grantmaking and operating. What about the other 95 per cent of your assets? When you talk about environmental sustainability, justice, peace and so on what is the way in which you invest the vast majority of your money silently saying about the change you want to see?

## Micro-lending with a difference



Kiva is a unique person-to-person micro-lending website, empowering individuals to lend directly to entrepreneurs in the developing world. Started as a small personal project by a couple inspired by Dr Muhammad Yunus, Kiva grew from the realisation of three truths:

- with ICT, we are more connected to the developing world than we realize;
- the spirit of entrepreneurship is very strong among the poor of the developing world; and
- stories connect people in powerful ways.

Using the power of the internet, they created the Kiva website and online infrastructure to enable anyone to give directly to people in the third world needing a loan to rise out of poverty.

Entrepreneurs' profiles can be browsed on the website, by sector (e.g. clothing, food, housing etc.), region and gender. Loans can be made using PayPal or credit cards. Kiva collects the funds and passes them along to one of their microfinance partners who then distribute the loan funds to the selected entrepreneur. Often, these partners also provide training and other assistance to maximize the entrepreneur's chances of success.

By providing loans to specific individuals, the loan enables that person to make great strides towards economic independence and improve life for themselves, their family, and their

community. Throughout the course of the loan (usually 6-12 months), email journal updates are provided and repayments tracked, making the transaction highly accountable.

The data-rich, yet clear and inviting, Kiva website ensures the system is transparent, showing how money flows throughout the entire cycle, and what effect it has on the people and institutions lending it, borrowing it, and managing it along the way.

Kiva partners with 100 existing expert microfinance institutions, gaining access to outstanding entrepreneurs from impoverished communities world-wide. The funds lent not only benefit the specific entrepreneur, but assist these charitable organisations to improve their reach and efficiency.

[www.kiva.org](http://www.kiva.org)

# Social entrepreneurs and social innovation

*By Michael Traill, Founding Chief Executive of Social Ventures Australia (SVA). SVA is a unique model of social investment that aligns the interests of philanthropists with the needs of social entrepreneurs to address some of Australia's most pressing community challenges*

**“The most powerful force in the world is a new idea that can change society – if it is in the hands of a true entrepreneur”. Bill Drayton**



American Bill Drayton founded Ashoka in 1981 with the simple idea of identifying and supporting extraordinary people around the world who were committed to achieving social change in their communities. Twenty five years later the breadth of Ashoka's reach is truly astonishing. The Ashoka network comprises over 1,700 Ashoka Fellows in 60 countries and has changed millions of lives for the better.

Ashoka Fellows include social entrepreneurs like Rodrigo Baggio. With grant money from Ashoka, Rodrigo has trained almost one million at-risk children in computer and internet skills through a network of more than 200 self-managed computer schools in the urban slums of 17 Brazilian states. By helping students who might otherwise have turned to drug trafficking or violence, Rodrigo is bridging the digital divide while providing important job opportunities to young Brazilians.

I first met Drayton in early 2002. A bookish, quietly spoken figure whose resume includes stints at McKinsey & Co. and shaping environment policy with the Environment Protection Agency in the Carter administration, he is regarded as the global pioneer of social entrepreneurship and was recently recognized as one of America's Best Leaders. I was fortunate to spend some time talking with him about the need for social innovation and entrepreneurship and about the opportunity for it in Australia. This meeting was deeply



*A circle of participants and leaders around a fire on a recent Pathways to Manhood program. There are many opportunities during a program to gather and share stories.*

helpful and influential in guiding our work at Social Ventures Australia (SVA).

Drayton's vision for social entrepreneurship centres on the idea that there is a rapidly developing 'third' sector. In an environment where governments around the world can be inefficient and the private sector motivated by profit, this citizen sector is ripe to provide change. The catalyst for this is the social entrepreneur – the visionary individual – who with the appropriate support has the capacity to leave a footprint of a changed and better community.

While Australia may not face the same distressing poverty, social and education indicators that Ashoka Fellows in developing nations address, there is no question we have a systemic failure to address our entrenched issues of disadvantage and need. The Australian social context is one which is ripe for the type of creative citizen sector change that visionary social entrepreneurs can drive.

Underlying the consistent and impressive GDP growth, which has put Australia's economic performance over the last 20 years at the top end of developed nation reporting tables, is a set of statistical indicators about what I call the 'other economy'. It reveals growing wage inequality; an accelerating concentration of social and economic disadvantage clustered in particular geographic regions, and a stubborn stickiness in measures of social engagement that suggests we have conspicuously failed to address many of the entrenched problems we face.

Paradoxically, it seems that even those who live on the right side of that economic wave are not necessarily any happier. It's a theme elegantly caught by social commentator Hugh Mackay. He talks about the 'affluent purpose seekers' who are juggling lives, kids, careers, money, 4WD's and upward mobility, but are often struggling to find day-to-day purpose or meaning in their lives. We're growing but we're not growing happier.

At SVA we believe we can change things and change them for the better. We see a real opportunity to crack some of our country's entrenched social problems and create a better society by more effectively harnessing the skills and philanthropic funding of Hugh Mackay's 'affluent purpose seekers' and connecting them to creative thinkers and social entrepreneurs who have the potential to make change.

Using our performance-based model of philanthropy, we apply business and strategic disciplines to help social entrepreneurs and social investors to make a real difference to our communities. We know that we can nurture their growth by providing the money they need to develop, the business and mentoring support to guide their journeys and the tools they need to help them communicate the impact they are having.

In the six years since SVA was created we have raised commitments of more than \$24 million from strategic foundations and social investors who have backed our belief in the power of identifying and supporting outstanding Australian social entrepreneurs. We work closely with around 20 social entrepreneurs – drawn from more than 700 non-profit programs we have reviewed since we started.

Our practical experience has taught us what to look for in an outstanding social entrepreneur:

- the ability to see a different way of doing things that addresses the core of a social or environmental problem – sometimes through creative genius, often the more prosaic but equally effective connection of obvious little things that should be happening but are not;
- a passion for achieving social impact; and
- a preparedness and an ability to negotiate and enlist support, inspire and motivate those around them and develop effective partnerships to support the cause.

We know if we support these social entrepreneurs with a mixture of funding, mentoring and organisational tools, we can help them change the map.

Funding may seem obvious, but we have come to feel very strongly about the way funding is applied to innovative social ventures to achieve maximum social return. Most of our financial support is directed to fund the capacity of the organisation to grow, not to fund programs. We believe that, by providing long term funding, we help the social entrepreneur build a sustainable organisation, essential if their innovative programs are to have maximum reach.

The use of effective organisational tools that help measure and track the short and long term impact of the social entrepreneur's program is another fundamental aspect of our approach. Transparency and clarity of outcomes is critical in demonstrating results and earning the right to ongoing performance-based funding.

The positive response to this model of engaged and tailored support for growing non-profit organisations has led to SVA establishing a Professional Services team. Working on a cost recovery basis, this team offers SVA Consulting services to both SVA supported social ventures and the

broader non-profit sectors, workshops which share organisational tools we've developed and mentor programs that engage senior managers in the corporate sector with their counterparts in the non-profit sector. The growth of this arm of SVA's work responds to a need identified by strategic individual and corporate philanthropists to equip non-profit organisations with the resources they need to help them clarify and articulate their performance, build robust and scalable organisations and demonstrate social impact.

We need to build greater alignment and understanding between philanthropists and fund recipients in this country. We must accept the limitations of many of the current service delivery and funding models that have not worked. We must see the need for innovation. The evidence is clear that more than 20 years of strong economic growth has failed to deliver social outcomes of which Australians can be proud. And we should be inspired by Bill Drayton's practical vision of the wonderful potential that social entrepreneurs can achieve.

### Case Study 1 – Resourcing the Social Entrepreneur

The Pathways Foundation is a high impact social venture that provides a contemporary, community-based rite of passage for boys into manhood and girls into womanhood. Chief Executive and co-founder Dr Arne Rubinstein, has seen the organisation go through an extraordinary period of challenge and growth as it aims to realise its national objective of bolstering self esteem and improving life outcomes for Australian boys and girls as they transition to adulthood.

Rubinstein says that he always knew the powerful week-long Pathways program was changing lives and the quality of father-son and mother-daughter relationships. His frustration was that three years ago, having given up his medical practice to commit full time to Pathways, he was unsure what was required for the organisation to achieve its aggressive national growth ambitions.

"We were on a hand-to-mouth treadmill of program funding in 2002. I knew we had to grow, because the need is so obvious, but I really struggled with what it would take for me and Pathways to build the skills to do that properly.

"Thanks in part to the support of SVA, in that four year period I have been able to lean very heavily on some leading business people who have been inspired by our programs, and they have helped me develop the skills I needed around planning, strategy, funding and dealing with growth. We still have many challenges, but I can now look back at a period where access to funding helped me build the support and administration structure I just had to have, which was fundamental to what we have achieved. We know how to grow now, and we know where to go to get the funding and support we need."

## Case Study 2 – Third Link Growth Fund: changing social investment



Chris Cuffe.

The Third Link Growth Fund, an Australian-first managed investment scheme, will generate an ongoing income stream for the not-for-profit sector, while also providing investors with the opportunity to increase their personal wealth and at the same time make a contribution to society.

All fees received from managing the Fund's investments, net of expenses incurred, will go to support the non-profit sector via ongoing donations to SVA. It is expected the fund will generate around \$1.5 million per annum for the non-profit sector.

The Fund is the brainchild of former industry stalwart Chris Cuffe, who in his role as CEO of Colonial First State, gained a reputation for his cutting-edge approach to anticipating trends then corraling top talents to take advantage of them before the market.

Chris has been working with SVA for the past 18 months. His involvement with SVA allowed him to experience first hand the vital contribution of the not-for-profit sector. Thinking about innovative ways to assist the work of this sector led him to initiate the creation of the Third Link Growth Fund. The name 'Third Link' directly signifies this important connection between the not-for-profit sector (often referred to as the 'third' sector) and investors.

The Fund's contribution to the not-for-profit sector will not be an additional expense to the normal fees and expenses of managing the Fund and will not dilute investment returns. Rather, it stems from the extraordinary and generous support of a number of investment and service professionals who have agreed to waive some or all of the fees that would otherwise be due to them. These waived fees are diverted, in effect, to the not-for-profit sector.

The generous providers of ongoing pro bono professional support include Treasury Group Investment Services Limited; RBC Dexia Investor Services Trust; Minter Ellison; BlueChip Communication Group; Ernst & Young; Deloitte Touche Tohmatsu; Simmons Johnson & Co; Geon; Link Market Services; and selected professional fund managers.

Chris will manage the underlying investments of the Fund through a newly created management company known as Third Link Investment Managers Pty Limited. An accomplished

volunteer panel drawn from senior levels of the Australian investment industry will act as advisers to Chris to provide input to the investment environment, strategy and specific investments held.

The Fund will operate as a fund of funds structure – meaning it will primarily invest in selected, professionally managed investment funds. Its investment objective is to provide a diversified growth-oriented investment, suitable for investors with a minimum five year time frame.

The ongoing management fee is 1.4 per cent per annum of the gross asset value of the Fund, from which normal operating expenses will be met. There are no entry or exit fees and no commissions paid to financial intermediaries.

The minimum investment amount is \$20,000. The unit price held at \$1.00 for all new applications received up to and including 30 May 2008. Third Link intends to stop accepting applications to the Fund once \$150 million has been received.

*To find out more about Third Link or obtain a prospectus, please visit [www.thirdlink.com.au](http://www.thirdlink.com.au) or call 1300 793 855.*

# A wave of change

By Annie Fogarty, The Fogarty Foundation

The ways in which people want to connect with their communities is changing. At the Fogarty Foundation we have chosen a strategic partnering approach to our social investments in order to help support our community and enable long term positive change.

We originally thought that education would be *one* of the areas in which we would be involved. Education is a very effective avenue to help people achieve their potential and provide equality of opportunity for everyone. After reviewing other areas of community involvement, we decided that, for our Foundation, education in its broadest form is *the* best avenue for fostering enduring social change.

We presently partner 11 different programs, all with an education focus but over a wide spectrum of the community. Many are within key institutes of education – schools, colleges and universities – but others reach out into the community through playgroups, parent help and developing the leadership abilities of young people and educators.

By focusing our investment, energies and skills in one particular area, our knowledge and expertise has grown substantially, which enables us to make informed decisions about the programs that we partner. This focus helps create the best programs possible and the ability to facilitate any synergies which may exist between the programs.

An example of this is where a number of our partners are working with educating children in a disadvantaged area of Perth. Through bringing the partners together they have been able to share their knowledge and are now all contributing to the new venture of a full-service primary school, where parents are able to access facilities such as the child health nurse, social workers and government agencies all at the one site. This will include Edith Cowan University hosting The Fogarty Learning Centre, an on-site training and demonstration facility, for their student teachers, and possibly social workers and behavioural science students.



*The UWA Fogarty Scholars and Nobel Laureate Professor Barry Marshall at a Leaders Series event.*

This innovative ‘edventure’ will have far reaching benefits. There will be the immediate benefits for the children and families at the school, and the student teachers and social workers who will receive a deeper and more inclusive training, assisting them to be better practitioners thereby affecting thousands of people over their careers. They will also have the knowledge and will be better equipped to work with people in all areas working for the overall wellbeing of our children.

The university base within the school will enable research opportunities. As it is anticipated that this school will produce innovative ways of educating, caring for and developing our children, models can then be used in other schools thereby producing lasting positive change across our community.

Through concentrating our efforts in the area of education we are also building our credibility as an organisation that can make a valuable difference, which enables us to engage with others of influence, which in turn creates the momentum for a more effective contribution.

As well as building bridges between our program organisations we invite corporates and individuals to either

partner with us in some of the programs or to be involved in related philanthropic activities.

We feel that by supporting and developing education and leadership, our activities will have long term benefits as well as the immediate results. The Scholarship and Leadership programs with which the Foundation is involved provide young people with the skills and ability to learn from today’s leaders which will create opportunities for them to be actively engaged within their communities.

The people whom the Fogarty Foundation supports are encouraged to show leadership in their own areas and to in turn benefit others, fostering an ethos of community involvement and young leaders who will inspire a new generation.

This is the ripple effect in action. Ensuring that all of our programs have benefits that go well beyond the immediate, will have long lasting positive change in the community, meaning that through social investment we can bring about a wave of change.

# Big, hairy, audacious philanthropy: The Caledonia Foundation tackles youth homelessness

By Fiona Higgins, Executive Director of The Caledonia Foundation

In 2006, like many in the third sector, The Caledonia Foundation watched in awe as Bill Gates and Warren Buffett pooled resources to create a philanthropic monolith capable of taking on the globe's most pernicious problems, including malaria and AIDS. The merger made sense; the world's gravest problems demand vast sums of social investment towards their resolution. But when it comes to assessing philanthropic impact, quantum isn't always king. The Caledonia Foundation maintains that it's not how much you're giving, but how you go about it that matters most. And in 2006, not long after the historic Gates-Buffett amalgamation, we took the opportunity to test our theory.

## The Caledonia Foundation

The Caledonia Foundation was established in 2002 by the executives of The Caledonia Investments Group. Our philanthropic focus lies with the development of sustainable futures for young Australians, and we typically support initiatives that promote their advancement, wellbeing and welfare. In particular, we prioritize projects that offer education and training pathways for disadvantaged young Australians.

## An evolving philanthropic strategy

In the early years of our operation, much of our philanthropy manifested as project-based funding for worthwhile initiatives that resonated broadly with our guidelines. But since early 2006, our philanthropic model has undergone a quiet revolution. We now recognize that we bring more to the table than just funds; we know we can add real value, over and above the financial support we provide. In identifying potential philanthropic partners, we increasingly look for the following hallmarks of effectiveness:

- **Sound leadership:** We back people rather than projects. Over the past six years, we've seen projects rise and fall on the strength of their leadership. It often takes the dogged commitment of just one individual to achieve significant social good.



Captain Paul Moulds, Salvation Army officer and Captain of the Oasis Youth Support Network, dealing with homelessness on the ground.

- **Leverage:** We are excited by initiatives that offer a 'ripple effect' beyond the funding/project cycle. We look for opportunities to take a project to scale through outreach strategies such as documentary film-making and web-based platforms.
- **Sustainability:** We favour projects which incorporate sustainability within their operating model. We think about the likely outcomes and impacts of projects in two, five and ten years' time.
- **Collaboration:** The more, the merrier. We love working with others, including business, governments and other philanthropic foundations, to achieve a common good.

## An opportunity emerges

In 2006 we began to canvass the idea of developing a high-impact, multidimensional initiative that would focus national attention on the plight of Australia's homeless youth. We sensed the scale of the problem through countless applications we received annually from homelessness agencies nationally. Moreover our Chairman, Ian Darling, had served on the board of the Salvation Army's Oasis Youth Support Network in Sydney's Surry Hills, witnessing first hand the prevalence and impact of youth homelessness.

We brainstormed the why and how of developing such a project and determined that for maximum impact, the initiative would need to encompass:

- (i) A piece of significant, evidence-based research that would articulate the extent and nature of the youth homelessness problem in Australia.
- (ii) A high-impact observational documentary that would personalize the face of youth homelessness.
- (iii) A strong education and outreach component that would ensure the issue was placed on the national agenda.

## Big, hairy and audacious

We knew what we wanted to achieve: the amelioration (ideally, alleviation) of youth homelessness in Australia by 2030. With this grand vision, we lined ourselves up for a philanthropic endeavour of 'David and Goliath' proportions. Youth homelessness is a complex issue and an objectively difficult problem for a small(ish) foundation to tackle. So we gave ourselves the best chance of success: we adopted a venture philanthropy model which galvanized financial, intellectual and educational capital.

Financially, we committed ourselves to substantial, multi-year grants to a discrete set of project partners. This included funding a significant research initiative, the National Youth Commission (NYC), which quantified and qualified Australia's youth homelessness problem via a Community Inquiry mechanism. The NYC held 21 days of hearings in all states and territories in 2007. Formal evidence was given by 319 individuals and 91 written submissions were received, including seven from government departments. It was a truly comprehensive process from which 80 recommendations were developed.

Intellectually, Ian Darling dedicated a significant amount of his time to the project over a two year period. An award-winning documentary filmmaker, Ian spearheaded the creative process of producing a high-impact observational documentary on youth homelessness. While documentary film-making as a tool for social change is relatively new to Australia – with philanthropic foundations traditionally reluctant to fund in this area – we recognized its latent power to deliver a high return on social capital. Al Gore's documentary *An Inconvenient Truth* tipped the scales in the global climate change debate. We envisaged a similarly significant documentary about Australia's homeless youth, creating a catalyst for change across Aussie breakfast tables, talkback radio, morning television and in Parliament House.

In an example of highly engaged philanthropy, Ian rolled his sleeves up and personally coordinated all facets of the project from inception. The Caledonia Foundation's staff provided assistance in daily management, planning, strategy and communications. We worked closely with the Salvation Army to determine an outreach campaign which would maximise public awareness and donations to 'the cause', and we walked with the NYC team as they painstakingly pieced together their 80 recommendations for change.

Educationally, we had a clear vision for ensuring that our two core contributions – financial and intellectual capital – were leveraged strategically through outreach. Thus, we funded the donation of a copy of *The Oasis* DVD to every secondary school in Australia, as well as the development of a study guide and website. Further, we committed to ensuring that the NYC's findings were effectively disseminated to all relevant policymakers at a Federal and State level, and brought to the attention

of philanthropic bodies like us. All up, we designated almost one-third of our project budget to education and outreach activities.

### Evaluation

Through these three pillars of investment – of financial, intellectual and educational capital – we aimed to ensure that the issue of youth homelessness achieved unprecedented public and policymaker attention. The Federal government would, we hoped, embrace the project as a compelling contributor to its new social inclusion agenda and the development of its Green and White Papers on Homelessness in the second half of 2008.

Our success will be measurable in practical terms through the 80 recommendations in the NYC's report, which offer an inbuilt evaluative benchmark. It will be possible for us to track the degree to which the NYC's recommendations are adopted by governments, now and in the future.

Anecdotally, we already know that the project captured the hearts and minds of millions of Australians. Over 1.1 million viewers tuned into the ABC's screening of *The Oasis*, followed by a lively panel discussion hosted by Tony Jones. The project received unprecedented media coverage in Youth Week, with television reports reaching more than eight million viewers on prime time morning, midday, evening and late-night television. This included a week-long special on Channel 9's breakfast program, Today. More than 100 articles on youth homelessness appeared in key metropolitan and regional newspapers. Not to mention significant national and local radio coverage through the ABC and commercial networks, coverage in social affairs publications such as *The Big Issue* and strong online blog and forum discussion.

We hope that we will be able to look back in 2030 and make a direct link between the awareness raised through the Australia's Homeless Youth 2008 project – a privately funded philanthropic initiative – and a range of community-wide initiatives that subsequently ameliorated (perhaps alleviated) youth homelessness over the ensuing two decades.

### Challenges

There's a lot to be said for venture philanthropy: a big vision, greater impact and a higher return on social capital, increased donor engagement and satisfaction. But what of the challenges? Two primary challenges emerged for us:

- **Self-imposed myopia:** Over the past two years, we've lived and breathed and loved this project. In the course of our dedication of intellectual and social capital, we probably missed other philanthropic opportunities. Certainly applicants to the Caledonia Foundation became familiar with the refrain, "We're fully committed right now to our youth homelessness project..."

Of course, we did support several other major projects in the period, including the Smart Population Foundation's 'Raising Children' initiative and the Art Gallery of NSW's 'Artside-IN' project. But these engagements were more 'passive' as we thoroughly committed ourselves to the youth homelessness project.

- **Over-engagement?** There's a fine line between donor interest and donor intervention. The four Commissioners of the National Youth Commission, our major partner in this project, no doubt rolled their eyes on a number of occasions as we requested yet another teleconference. There were, of course, times of intense pressure where 'robust conversations' were required to resolve differences of opinion. However, on reflection, the NYC's project leader, Associate Professor David McKenzie, described our high-level engagement thus:

"Caledonia's involvement in the NYC represents a bold philanthropic commitment to effect significant change for young people beyond the more traditional charitable funding of projects and property."

While the Australia's Homeless Youth 2008 project wasn't an initiative of Gates-Buffet proportions, it offered a unique opportunity for a relatively small foundation to potentially effect long-lasting social change. As we monitor its impacts into the future, we will continue to salute the efforts of all those in the third sector – from case workers and social workers, to researchers and service managers – who tirelessly dedicate themselves to Australia's homeless youth, so often rendered voiceless by systems that fail them.

[www.caledoniafoundation.com.au](http://www.caledoniafoundation.com.au)

# Making a *different* difference – our journey to uncertainty

By Fran Westmore, Executive Officer, DonkeyWheel



From its first grant in 2005, Donkey Wheel followed the traditional philanthropic model of providing monetary grants to charitable organisations. Our interest was always in social change, and particularly in moving away from solving today's problems and instead, creating new possibilities for the future. We looked for quirky, maverick ideas that could make a *different* difference and we particularly looked for leaders who were passionate, visionary and ahead of the mainstream.

Along the way, we struggled with the relative merits of welfare versus change, understanding that, as a small organisation, our grants would be an insignificant drop in the ocean of immediate global needs for food, shelter and other basic human rights. We therefore chose to try to reduce the need for services in creative ways as our key strategy.

We sought out small, inexpensive activities that had the potential to create relatively huge change, and funded ideas that were struggling to find support because they were high risk, non-mainstream and/or very different in their approach. We have funded projects as diverse as:

- a documentary on Indonesian fires that is impacting international thinking;
- a program to build capacity for Indigenous traditional knowledge revival (also spreading overseas);
- support for local development of an alternative fuel car; and
- establishing creative ways to get sustainable income streams for small groups.

However, and perhaps unsurprisingly, genuinely different ideas were not easy to find. As the 2020 summit demonstrated, most people, when asked for ideas, trot out the safe and predictable, saving their 'crazy' dreams for trusted friends and colleagues.

We are very proud of the work achieved by our grantees, but found that many applications were problem focused and written in a way that reflected the applicants' attempts to match our criteria rather than their own big vision for the future. Even when an exciting idea came our way we found that distilling a visionary idea through the soul destroying process of site visit, application form, criteria, summarization and round table discussion (without the applicant) took the heart and soul out of the work. We also found that visionaries were impatient of being boxed into a grant application process and often avoided it. We concluded that there was room for a new approach and set out to find it.

After months of research and debate, our Board and Wheel (Gifting Committee) concluded that our big vision was to encourage those involved in social change to think differently, act differently and make a *different* difference. As a result, we are now exploring a new, exciting (and very daunting) venture tentatively called the Donkey Wheel Hub. Moving against the virtual networking trend, we plan to create a physical space, because we believe that social change is all about relationships – the kind that develop through collaboration, deep conversations, shared food and having fun.

Rather than directly funding projects on the ground, we hope to provide a place for elders and new social change leaders, corporate social responsibility representatives (CSRs) and philanthropists to come together with courage, conviction and delight in their desire to change the world. We dream of a dynamic meeting place with an 'edge of chaos' ambiance from which creative ideas can emerge, and a

nurturing home feeling where leaders of change find the courage to speak from the heart in ways that excite and attract powerful alliances and build energy and momentum. We picture an open door for fellow travellers and partners such as media, government and schools, where visitors are surrounded by visual arts, performance and quirky décor, meeting spaces are unusual and our café and outdoor garden welcome papers, laptops and long debates. We hope to share the Hub with tenants of like minds and provide friendly workspaces for regional and interstate visitors, a kitchen table for new philanthropists and a starting place for emerging organisations.

We plan to host Ideas workshops, where people of passionate conviction can rediscover the ambitious, impossible ideas that have lain dormant since the pragmatic world rejected them and we will offer a project officer and a marketing guru to help fund them. We also plan think tanks, soapboxes, documentary showings and an elders circle.

While there is evidence of the need for such a hub, our plan carries a high risk of failure and we are both exhilarated and scared to death as we set out on this journey; as with any new idea, we are in uncharted territory and we may well fall flat on our faces. Will leaders come to talk, to listen, to dream – to be a part of the magic of change in action, or will we be left with dusty rooms that echo with lost opportunities? Will Donkey Wheel hosted projects be valued by other philanthropists and CSRs or will our approach simply be seen as arrogant? We have no answers, and while that is very uncomfortable, perhaps it is only fitting that our outcomes should be as uncertain as those of the social change projects we hope to support.

The final jump is still months away at least: among other things, we have lots more market research to do. As part of that process we would love to hear your ideas and suggestions. If you can help, please contact Fran Westmore on 0418 932 218.

# Wrestling with philanthropy: thoughts on 'effectiveness'

By Karen Loblay



For the 35 plus years of my working life I have been a 'philanthropist', however, I find the term unsettling. I have never seen myself as doing anything other than giving back to the community that gave rise to the conditions for my family to thrive and succeed. And I also felt, from an early age, that there must be more that I could do. This feeling evolved, so that five years ago, I established Matana Foundation for Young People.

I see my role in my business life as, of course, creating wealth for my family, but also promoting ethical practices, sustainability and quality architecture (this coming from my position as a 'lapsed' architect). In my new role with the Foundation, I see this as a natural progression from giving to my favourite causes (youth, human rights, environment, etc.) to focusing on my greatest passion, disadvantaged young people.

This is a new world, a new learning, for me. From the terminology of architecture, construction and property, I now inhabit the world of philanthropy and its own specialised language. Terms such as strategic philanthropy, venture philanthropy, engaged philanthropy and social investment. I had to define my values and motivation and wrestle with the philosophical notions of 'civil society' and 'disadvantage', the idea of 'how to do philanthropy better'.

Professor Dorothy Scott in her address to the Philanthropy Conference in October 2005 spoke of the concepts of philanthropy in the 21st century:

"From effective philanthropy to visionary philanthropy or from success to significance.... Philanthropy can afford to take risks and can achieve things more easily than governments... the definition of philanthropy is 'love of mankind' and 'practical benevolence'... the evolution of the term is now almost exclusively to donate money yet in the 19th and early 20th century, the term was used to describe a broad range of activities beneficial to society including social reform and the fight for social justice... Philanthropy which is not just successful but is also significant."

Professor Scott also spoke of the reasons why issues affecting children and youth are so important:

"It is hard to think of an area of philanthropic activity which might have greater long term impact on our society than helping to create optimal conditions for the healthy development of infants and young children... it is critical to the very essence of civil society."

She also spoke of "philanthropy which is rich in moral and intellectual capital as well as financial capital."

Christine Edwards, CEO of The Myer Foundation in her address to Community Foundation Forum in August 2006 said:

"Responsible philanthropy is broader than responsible grantmaking... (it) is about humanity – other people's and ours. And good philanthropy and partnering must be about both technical skills and our own personal humanity".

"In order to be effective in philanthropy, we need to do four things:

- have a vision and focus;
- research;
- match our strengths with our vision; and
- evaluate, learn, and pass on these learnings.

This enables us to make decisions about projects that may have a degree of uncertainty, or to fund

the development of an idea, or to fund in areas that others cannot."

"Mindfulness is about having openness to new thinking, not using old classification that inhibits creative thought, and about having an awareness of there being more than one perspective... Using respectful dialogue and engagement..." in partnering... 'Grantmaking' is only one part of philanthropy. The rest is about community building, community development, relationships, and social networks."

It is, then, these concepts that I have struggled with these past five years, about how the Foundation can be more effective going forward with a new approach to our work but at the same time, somehow going back to an older definition of philanthropy, of engaged philanthropy and of activist philanthropy where we see social justice as equality of opportunity as well as equality of outcome and philanthropy as much more than simply grantmaking.

In the practical translation of these concepts, we try to identify projects with the most impact for the most young people, so that our funding is effective not just in the economic sense but in the human sense. It is sometimes impossible to evaluate effectiveness in this human sense. So we ask ourselves, what would happen to these young people if we don't fund this project and we consider how we will impact their lives if we do.

In the future, we hope to use our established credibility to advocate for the most marginalised of the young people we work with, helping to empower them but also to engage our communities with their welfare, because as Professor Scott so rightly says, it is critical to the very essence of civil society.

# Small, simple and successful: tackling homelessness with StreetSmart

By Adam Robinson CEO, StreetSmart

Two grown men, a football, a patchy oval and a good idea. That's how the Big Issue's Street Socceroos started in late 2004. What was missing was the seed funding to help this project grow.



Early in 2005 StreetSmart funded the Big Issue's Street Socceroos and late last year the Big Issue secured State and Federal grants to roll the project out across the country and host the Homeless World Cup in Melbourne later this year ([www.homelessworldcup.org](http://www.homelessworldcup.org)).

The Street Socceroos are helping hundreds of people reconnect with their community, tackle addiction, improve their wellbeing and circumstances to enable them to make sustainable changes in their lives, often helping to avoid or move out of homelessness. It is just one of 125 projects StreetSmart has funded since 2004.

## Beginnings

I set up StreetSmart in 2003 out of a deep-seated sense of frustration in the lack of action being taken to tackle homelessness; it was very much a personal action, so Ghandi's quote 'be the change you want to see in the world' rings true. Helping others and making our country a fairer, more connected place, somewhere I want to be proud to live and to bring my kids up, motivated me to start StreetSmart. Homelessness to me is unacceptable and needs to be tackled.

In 2002, having jumped ship from the world of business and marketing to pursue an interest in social justice and the environment, I was working with

small not-for-profits developing fundraising strategies. It was extremely difficult. These organisations were poorly resourced and lacked the expertise, networks and contacts that make fundraising possible. My sister called me one night from the UK to tell me

if he could help. Christopher agreed to be the initial Chair of StreetSmart and between us we pulled together a board of enthusiastic supporters and raised the initial financial resources to establish StreetSmart.

**"I set up StreetSmart in 2003 out of a deep-seated sense of frustration in the lack of action being taken to tackle homelessness; it was very much a personal action, so Ghandi's quote 'be the change you want to see in the world' rings true."**

about StreetSmart in the UK, a simple campaign where diners at participating restaurants are asked to contribute a small donation onto their bill during the six weeks prior to Christmas.

I looked closely at the model and decided that it could fulfil a real need in our community and build a bridge between these small community organisations and the people who would support them, if only they knew of the need. The simplicity of the campaign, enabling us to connect with people in a social environment (restaurants) about a serious issue (homelessness), asking for a small contribution that would add up to greater impacts, made it particularly appealing. So I committed to establish StreetSmart in Australia.

## Supporters

I set out to talk to those who could help me achieve my goal and approached Christopher Thorn at Goldman Sachs JBWere Philanthropic Services to see

StreetSmart was set up as an independent organisation with no affiliations or connections to larger agencies, which gives us the freedom to set up an innovative, flexible funding model, able to fund organisations which may not have DGR status, but which deliver services to some of the most disadvantaged members of our community. We decided we needed on the ground, expert advice so we established Grant Advisory Committees in all States in which we operate.

These committees are made up of people who have specific knowledge of the issues of homelessness on the ground, including people who have experienced homelessness themselves. Committee members are asked to solicit applications from those organisations that are known to them on the ground or to their networks, and are unable to seek funding for their own organisations to avoid a conflict of interest. We look to engage new members to



Helping to launch StreetSmart back in 2004 at Docklands in Melbourne are Tim Costello, StreetSmart Patron, Adam Robinson, Founder and CEO of StreetSmart, and Justin Glass, a grant recipient from the Matthew Talbot Soup Van.

the committees regularly and wish to develop the model of consumer participation more thoroughly this year after a successful trial last year.

#### The way we work

100 per cent of any money raised from the public is distributed, and we work hard to ensure that funds are kept in the local communities where the money is raised. All the running costs, salaries and marketing expenses of StreetSmart are covered by philanthropic grants and sponsorships.

Since 2003 we have made 125 grants, totalling \$480,000, and have been involved in the early funding of several projects that have gone on to gain prominence in the community, such as the Choir of Hard Knocks.

Being a minnow in the charity sector has meant that StreetSmart has had to find its niche, do things differently, and appeal to a different audience. Transparency and communication of what StreetSmart is and what we do is a priority. Evaluation is done through

a reporting system and information is made available through our website to encourage an exchange of learning between grant recipients. Importantly StreetSmart often facilitates introductions between agencies to share learning and prevent duplications across the sector.

#### The website window

Our website is our shop window and its development and our use of social networking and media sites has been driven by our need, as a small organisation, to reach our potential supporters. At the core of this development is storytelling and our need to communicate, on a personal level, our values and the campaigns' impacts. In 2008 we are looking to continue this development with increased use of web 2.0 innovation, constantly looking to use new ways to connect with supporters.

StreetSmart's goal is to keep growing the funds we can distribute. To ensure these funds are deployed to maximize the outcome we are refining and increasing the engagement of our

grantmaking to ensure the money gets to those who can make the greatest impact.

Increasingly, as we do this, other grantmakers are recognising the knowledge and understanding of homelessness issues and organisations that our Grant Advisory Committees bring and want to utilize this by joining us in our grantmaking. Our most recent grants round included \$10,000 of matched funding, an exciting development.

We are keen to share this information with other funding bodies such as philanthropic trusts, Prescribed Private Funds, individuals and families, to continue to build financial and other support for smaller organisations and programs.

*If you would like more information please contact Adam Robinson CEO (03) 9836 1887 or visit the website [www.streetsmartaustralia.org](http://www.streetsmartaustralia.org)*

# Feature interview: Ian Darling

Ian Darling is a documentary filmmaker, producer and co-director of 'The Oasis' a documentary about youth homelessness which recently screened on ABC television. Ian is also Chairman of the Documentary Australia Foundation, a new philanthropic initiative for foundations, charitable organisations and documentary filmmakers, and Chairman of The Caledonia Foundation, a private foundation (PPF) focusing on the education, training and welfare of underprivileged young Australians, which funded 'The Oasis'. He is also Chair of the Sydney Theatre Company and STC Foundation. He spoke with Louise Arkles about innovative philanthropy, planning for high impact, and the wearing of many hats.

## How would you describe yourself to our readers?

At the moment, primarily as a documentary filmmaker. I don't really see myself as a philanthropist. Perhaps it's an age thing – I've always viewed philanthropists as in their 70s and 80s, I'm only in my 40s. Social entrepreneur sounds far too progressive for what I do, but in terms of philanthropic activities I get involved with I really like to roll my sleeves up and get very involved.

## What were the early influences that led you to become engaged in philanthropic giving?

Early on in my career I was invited by a friend to join a fund-raising committee for the Salvation Army and did some volunteer work over the Christmas period. Around that time my colleagues and I were evolving our investment business and researching what other investment groups around the world were doing, and realised that giving was actually a very important part of business. No one told us we should become more involved in community issues, we just did by osmosis.

## What is your approach to philanthropy?

Our approach at The Caledonia Foundation is based on a business approach. In business you need to keep reinventing yourself and keep assessing whether or not you're making an impact and maximising your return on investment, or from a philanthropic perspective, whether you're maximising



*Oasis documentary co-director and producer, Ian Darling (front), with the Salvation Army's Paul Moulds, manager of The Oasis Youth Support Network, and formerly homeless young men, Darren and Beau. Photo: © Newspix/Alan Pryke.*

the return on social capital. There's a big learning curve that happens initially – we spread our wings quite widely, while defining our focus to helping young Australians. For the first few years we gave many small grants, and got swamped with applications – which is a healthy thing as we were able to see what was happening across the field.

Part of that process led me to see how significant the problem of youth homelessness was – we were getting hundreds of applications from groups trying to help. Over the course of the years we started to question whether we were making a difference by giving lots of smaller grants, and also whether it sustained us as grantmakers – which is often an overlooked thing.

Philanthropy, I think, is a long, committed journey and grantmakers have to feel inspired and enthused to keep doing what they're doing. It's not just writing a cheque but keeping engaged, that's part of proactive giving. One great thing about PPFs is that people are wanting to wrap their arms around the issues they engage with, which sustains them for the long haul.

## Has your grantmaking changed as a response?

We felt that we needed to improve our grantmaking and make more of a difference, and rather than providing bandaid solutions to all of the things we were giving to, we decided that every year or two we would make a profound difference in a specific social issue at

**“We felt that if we aren’t prepared to go on the public record then maybe we aren’t maximising our impact.”**

the macro level, while still supporting a number of smaller groups.

Using youth homelessness as an example, we’ve been supporting a number of organisations that have been dealing with the issues for a while now, and we wanted to try to put it squarely on the agenda – to encourage the government to focus on the issue, secure significantly more resources, and bring the community behind it. By showing a degree of leadership in this space we hoped to get corporate Australia and other philanthropic foundations to focus more on homelessness too.

#### **How important is it to you to talk publicly about your giving?**

We used to be very shy about talking about what we’re doing at The Caledonia Foundation, and we still don’t reveal how much we’re giving, but now we do talk about what we’re doing. Foundations do need to openly, and without embarrassment, show that they believe in something and want to make a difference. We felt that if we aren’t prepared to go on the public record then maybe we aren’t maximising our impact. By getting over the hurdle of showing what we’re doing, without showing the sums involved, we feel our shared experiences can be valuable for the sector, just as we have gained enormously from other case studies here and abroad. Maybe the day will come when we are happy to show how much we’re contributing financially, but for now that’s not important.

This is a bold move for us, for us to have gone out so publicly and put our name to the first independent report into youth homelessness in 20 years, associate ourselves with the outreach and education of the documentary and push so hard to get an issue on the national agenda. Rather than just a campaign, we needed to put a face to youth homelessness, we also needed to back it up with the facts and

figures, to offer a report that had recommendations, that was by the community. We think it’s quite a good model for private philanthropy.

#### **Tell us about your first documentary film on Warren Buffett, ‘Woodstock for Capitalists’**

At Caledonia Investments we had based our business on Buffett’s investment philosophy. We went over to his shareholder meetings every year and one the things we observed was that attendance at his annual shareholder meeting was growing from 200 at the first one, to 400 at the next and 800 the following year! (Over 30,000 shareholders attended his 2008 meeting).

We realised that, whilst he was regarded as the best investor in the world, if it was only about money this sort of phenomenon wouldn’t be happening. There must be more to it, and we discovered that there was group of people with shared values who saw that Buffet represented the good side of capitalism. At the close of the film, we summarise that Buffet has shown that you can do the right thing by your employees, by your shareholders and by the community, and at the end of the day you can still have the best investment record around. It’s not an either/or. This was a positive message we wanted the audience to take away from the film.

#### **How much overlap is there between your various activities and hats?**

Everything seems to be enmeshed, my films and my communities. The third film I made was ‘In the Company of Actors’ on the Sydney Theatre Company (STC). I’m a strong believer in the arts, not only as entertainment but what the arts can do for the community as an education tool, a tool for personal development, or for social change. For a health society it’s really important to have a strong, vibrant and thriving arts community. Since making that film I’ve become

Chairman for the STC, extending my interest in the arts. ‘The Oasis’, my latest documentary, came out of having spent 10 years in a variety of voluntary roles, with Paul Moulds from the Salvation Army. I worked in Oasis as a volunteer, getting a sense of how big the whole problem is. So each of the films has been in a sense a personal journey, but over time I’ve been able to relate them to my philanthropic work – so I’m proud to say I eat my own cooking!

#### **Why has ‘The Oasis’ been so successful?**

It’s still early days, so its success is still being measured. But we felt the timing was right, with the issue rising on the government agenda, which helped enormously. I’d like to think we had a very considered approach to it, bringing out the documentary and the report, and developing a communications strategy to ensure there was a single message.

We realised this message was too important to let it slip, so our communications team organised the National Youth Commission launch and all the press around that, and co-ordinated with the Salvation Army media unit, the Oasis team, and The Caledonia Foundation – so there was a huge wheel that needed a central voice.

#### **How would you like to see the philanthropic sector changing in the next few years?**

I think the trends are really good, it’s great that more and more new foundations are being created. I’d like to see corporate Australia significantly increasing their contribution to the community. One of the things I’m thinking about is, just as we have a compulsory super contribution 9 per cent, we institute a 1 per cent ‘compulsory community levy’, whereby every company was given a big incentive to put a large capital sum upfront to establish a corporate foundation, and then put 1 per cent of profits annually into that vehicle, which has its own independent board of trustees. It’s a pity to think that we have to force it on the corporate sector, but with the right incentives it could be a great awakening for corporate Australia, and they’d see that being a good corporate citizen is not only important but also very rewarding.

# Getting value for money – funding the change you want to see

By Trudy Wyse, Manager Community and Donor Services, Melbourne Community Foundation

By its nature, social change is a messy business. It often takes place over years, and involves contributions from many different people, projects and organisations.

Changemakers Australia was established two years ago specifically to bring together funders who are committed to social change or social justice philanthropy, as well as to encourage and inform others about the opportunities and challenges this approach to funding provides. We represent a growing body of people who want to see more philanthropic funds directed to projects and other initiatives that are working towards effective, long term social change. The materials we produce and forums we run are designed to explore innovative grant making strategies that can deal with what are often tough and intractable issues, across a range of social policy areas.

## What is social change?

Social change philanthropy directs its support to activities that address the underlying causes of social ills, such as poverty, inequality, abuse of human rights and environmental degradation. For Changemakers Australia, real and lasting social change occurs when the activity that has been funded contributes towards, or results in, concrete and identifiable positive change in the policies, laws, institutions or culture that have led to groups of people becoming disadvantaged or discriminated against in the first place.

In the words of Julian Gardner at the 2007 Changemaker's AGM, "It is vital that the agencies and groups that work with poverty, inequality and abuse (and those that fund them) seek to be a force for change. That is not to say they abandon their important role in providing individual help, but that they use the accumulated evidence from their work – experience that gives them legitimacy – to mount a case for change."

Over the past 12 months, Changemakers has been focusing on developing two major bodies of work that will underpin a range of public activities within the philanthropic sector in the near future. These will assist funders to feel more confident about supporting the social change activities of the organisations they fund.

## Am I allowed to do it?

Funders can be concerned about supporting social change activity, not only because it can be difficult to be clear about the outcomes and timeframes, but because, in many cases, successfully working towards long term or systemic change requires advocacy related activity. In its broadest sense advocacy means 'active support of a cause' and it comes in many guises. It can range from organising local residents in response to a neighbourhood issue, running a public education campaign, providing in-depth research, or, when asked, helping governments to draft public policy.

The concern is that advocacy is 'political' and funding it may result in the loss of the funder's charitable tax status. The reality is that the laws regarding what can be legitimately funded are less restrictive than many funders assume. In the words of the Tax Office itself "Charities can carry out (and fund) political, lobbying or advocacy activities, where they are carried out for the sake of, or in aid of, or in furtherance of the charitable purposes" (and is not the dominant purpose of the charitable organisation).

Through its recently released paper *Funding Advocacy for Social change: Clarifying the Rules for Grantmakers*, Changemakers Australia provides greater clarity for grantmakers about what they can legitimately fund to assist organisations achieve their charitable purposes.

In the longer term, Changemakers will be holding workshops for grantmakers on funding advocacy. We will also be making representations to the Federal Government to review

charitable legislation, encouraging unambiguous recognition of the range of activities that may be undertaken in order to achieve the charitable purposes of an organisation.<sup>1</sup>

The first of a series of workshops for funders to explore the issues raised in the paper will be held in Melbourne in July, followed by a session in Sydney.

## How do I know what works?

Social change projects often change shape and colour in response to emerging challenges and opportunities that could not be anticipated at the planning stages. As a result, the outcomes of a successful project may differ markedly from those anticipated at the outset. All of this is a challenge for evaluating social change projects and can make potential funders nervous. How do they know what it is they are funding, if it needs to adapt to changing circumstances? How do they know whether the project/activity they have supported has been successful, when it may only be a small part of a much larger process for long term change?

The *Navigating Social Change* initiative is based on the premise that while evaluating social change projects is challenging, it is vital to do – in order to improve them, to learn from them and to demonstrate their value. A guide and workbook being produced as part of the initiative uses the metaphor of navigating a journey, to assist organisations and their funders to assess where the project got to, what was achieved and what needs to happen next.

Once completed and trialled, this material will be distributed widely and form the basis of a series of workshops.

*To learn more about Changemakers and its activities, or to download the Advocacy article, please go to the website: [www.changemakers.org.au](http://www.changemakers.org.au)*

1. This is in line with the recommendations of two major Federal Government commissioned reviews in 1994 and 2003, both of which recommended significant modernisation to the definition of charity, but were not adopted.

# Giving circles – something to SMILE about

By Lyndall Beville, Chair, SMILE Foundation

SMILE Foundation is a charitable institution which currently funds three Australian research projects into rare childhood diseases and provides assistance to families of kids with these rare conditions.



One reason SMILE makes us feel great is that SMILE is a shared experience, as a couple, it takes us beyond the everyday. How much more powerful then if SMILE can be shared with others? Hence the SMILE Giving Circle.

When philanthropy gives a sense of active rather than passive engagement, that's exciting. Giving circles are exciting, investing strategically is exciting. My dream is for SMILE to be dynamic, an inspiration to others and truly effective when it comes to helping kids with rare diseases.

## The SMILE Giving Circle

A recent definition explained that "A giving circle is formed when individuals come together and pool their dollars, decide together where to give the money, and learn together about their community and philanthropy."<sup>1</sup>

Giving circles are springing up like mushrooms in the US (around 800 at last estimated)<sup>2</sup>, injecting hundreds of millions of dollars into communities and inspiring thousands of people along the way.

The idea is yet to really take off in Australia. It does exist in an informal way between family and friends, and some community foundations support shared giving. SMILE plans to formalise its giving circle based on successful US models, taking a leadership role in inspiring others towards the giving circle path.

We are currently recruiting members to our circle, and I am very pleased to say that SMILE Ambassador Elle Macpherson has chosen to take part, lending her resources and profile to our new initiative.



The giving circle model will appeal to those who want to be actively engaged in their giving, but may not have the time to research and evaluate a myriad of options. Those who like the idea of giving in a collaborative way, and maximising the impact of their dollars by pooling funds with others will find the circle attractive.

I think it will also have particular appeal for medical research philanthropy where it can be challenging to find the best projects. SMILE has an on-staff research advisor, a Scientific Advisory Panel and rigorous selection process to guide us through this process.

## How the Giving Circle will work

SMILE has opted for a reasonably high entry point for its giving circle of a minimum \$50,000, tax-deductible contribution (payable in instalments over two years). The reason for this is twofold – the projects we support are expensive, with average research grants of \$300,000. In addition, we would like to keep membership limited to 30 in order to create an intimate and engaged environment.

The circle will come together twice a year to consider a shortlist of outstanding projects and choose those which SMILE will support.

SMILE's value add is in the compilation of the shortlist, which will comprise research and 'hands-on' projects. Research projects will be put forward following a national grant application process and peer review by our

Scientific Advisory Panel. Projects to help families of children with rare conditions will be selected following consultation with parents, hospital social workers and paediatricians. The shortlist will be managed by SMILE's staff team, and approved by SMILE's Board of Directors prior to presentation before the circle.

Members of the giving circle who donate \$50,000 will each have one vote in the selection process. Those who donate \$100,000 or more will have two votes.

SMILE will provide many ways for giving circle members to become involved beyond taking part in bi-annual meetings. A calendar of social events, participation in strategy workshops, visits to research institutions and children's hospitals to name a few. Existing members will also be key to recruiting additional members, and may wish to host a SMILE soiree for their own networks – socialising with a purpose.

SMILE will also maintain a more traditional fundraising program, including corporate partnerships and events. Individuals who wish to donate to SMILE without becoming part of the circle may of course do so, and can choose specific projects to support.

To quote the US Regional Associations of Grantmakers, "Giving circles simply make sense. The research definitely shows that donors can accomplish more good, learn more, make better decisions and have more fun when they give together."<sup>3</sup>

1. 'More Giving Together, The Growth and Impact of Giving Circles and Shared Giving', Forum of Regional Associations of Grantmakers (2007).
2. 'Just Causes – The Giving Back Gang' Linda Daily, *Delta Sky Magazine* (January 2007).
3. See (1).

# The Scanlon Foundation and its focus on social cohesion

By Tony Fry, Executive Officer, Scanlon Foundation

The Scanlon Foundation believes that the future prosperity of Australia, underpinned by population growth, will depend on our ability to maintain social cohesion in a society with even more cultural diversity than we have successfully accommodated historically.



The Foundation's mission 'to support the creation of a larger cohesive Australian society' came about through a thoughtful process, following its establishment in 2001, whereby its Trustees wanted a focus that was important and which they could pursue with passion.

We checked all potential and eligible areas, assessed the extent to which they were being adequately covered and recognised that if we aspired 'to make a difference' we would need to be focussed, undertake necessary research and be willing to make a long term commitment to our mission.

We also decided that it would be important to work with and capacity build, where appropriate, existing organisations that are best placed to achieve positive outcomes from our grant giving.

## Our focus on social cohesion

In pursuit of its mission over the past four years the Foundation has therefore provided substantial funding grants for social cohesion research, aimed at creating awareness and knowledge-based discussion about Australia's population growth and its relationship to social cohesion.

*Mapping Social Cohesion – the Scanlon Foundation surveys* has been recently published, based on the findings of a national survey to:

- establish a benchmark measure of social cohesion in Australia;
- provide information that will contribute to improving social cohesion in Australia; and
- identify social or cultural barriers to increasing Australia's population through increased immigration.

The survey adopted an eclectic, wide-ranging approach to incorporate five domains of social cohesion:

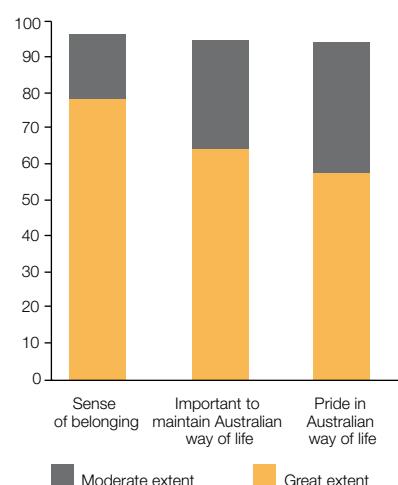
1. **Belonging** – shared values, identification with Australia, trust.
2. **Social justice and equity** – evaluation of national policies.
3. **Participation** – voluntary work, political and co-operative involvement.
4. **Acceptance (and rejection), legitimacy** – experience of discrimination, attitudes towards minorities, newcomers.
5. **Worth** – life satisfaction and happiness, future expectations.

Undertaken in 2007, it surveyed attitudes defining social cohesion in multicultural Australia and found a strong sense of belonging, pride, happiness, social justice and worth among the country's people.

## Australia's population

For the last 50 years Australia has had an average growth in population of 1.2 per cent per annum. Migration has been a critical component of this growth. So much so that almost one quarter of the Australian population today were born outside Australia, and

## Indicators of belonging



in 2006, migration represented over 50 per cent of Australia's population increase.

As to the future, our dependence on migration over the next 50 years is unlikely to diminish and we will continue to rely heavily on migrants for our vibrance and our vitality.

In addressing Australia's potential future population the Foundation sought professional advice in 2003 from the Australian Institute of Demographic Research at the Australian National University (ANU), adopting as a working hypothesis, 'a future population for Australia of 30 million people by 2050 (30/50)'.

In 2004 we then commissioned the Australian Academy for Technological Science and Engineering (ATSE) to undertake a major study. This culminated in a Report ([www.atse.org.au](http://www.atse.org.au)) entitled '30/50 The Technological Implications of an Australian Population of 30 million by 2050', which concluded that:

"there are no insurmountable technological, engineering or environmental barriers to Australia sustaining a population of 30 million by 2050, assuming that thorough analysis and planning occur and that leadership is exercised, especially by governments."

### Mapping Social Cohesion Report

The *Mapping Social Cohesion – the Scanlon Foundation Surveys*, represents the first round of a major longitudinal survey of attitudes to social cohesion in Australia, under the direction of Professor Andrew Markus of Monash University.

The large-scale survey shows that:

- a majority of people trust their fellow Australians;
- a growing number support government assistance to ethnic minorities;
- community disaffection rates in Australia are comparatively low; and
- there is strong and broad based majority support for current immigration intake levels, even though these are at their highest point in the post World War II period.

The survey polled 2000 adults across Australia. The results were further underpinned by a series of comparative surveys in five local areas of high immigrant concentration where, it is thought, the potential for social tension is higher.

The report, available from [www.globalmovements.monash.edu.au](http://www.globalmovements.monash.edu.au) contains key findings from the national and local surveys which include:

- a majority of Australians agree with the proposition that 'most people can be trusted', a marked change from responses given in the past decade;
- the lowest level of support for government immigration policy is found among people with trade level qualifications, people born in Australia to Australia-born parents, and those aged over 54 years;
- nearly one in four long-time Australians (i.e. those born here to Australian-born parents) think that the current immigration intake level is too high, disagree with diversity in the immigration program and disapprove of government assistance to ethnic groups;

- some 85 per cent of people expect that their own lives will be the same or better in the next three to four years, but only 52 per cent expect that the lives of today's children will be the same or better in the future (some 43 per cent thought they will be worse off);
- Victorians and South Australians are most likely to agree with the proposition that 'accepting immigrants from many different countries makes Australia stronger';
- nationally, around one in 10 Australians report discrimination on the grounds of ethnicity or religion over the past 12 months; 5.8 per cent of respondents report experience of discrimination on a continuing basis, at least once per month; and
- in the local surveys, over half (53.6 per cent) of those whose first language is Mandarin, Cantonese or Vietnamese report experience of discrimination over the course of their lives.

### Where to from here?

The Foundation's Chairman, Peter Scanlon, in launching the survey results, stated "The concept of social cohesion is both complex and elusive and yet pivotal to our historical success in dealing with immigration, and to our future ability to repeat this success."

"We are indeed a nation of immigrants; we always have been a nation of immigrants; and we will continue to be a nation of immigrants."

So much so that Hugh Mackay, probably Australia's most pre-eminent social researcher, wrote an article on the quest for an Australian distinctive value and concluded and I quote:

"Beyond all that, there is a distinctively Australian achievement: we are world champions at creating a harmonious society from a blend of people who, over the years, have come here from every imaginable birthplace."

The Foundation recognises that this can lead to sources of social tension, and challenge the cohesiveness of our society. Therefore understanding the practical meaning of social cohesion, and attempting as far as possible to map and measure it at both the national and local community levels, is important.

Social cohesion can't be left to chance! We need to 'understand it', we need to 'measure it', and we need to 'act'. With this in mind, since the Foundation's establishment in 2001, grants of over \$3 million have been made for projects with a Cultural Diversity and Social Cohesion focus to over 100 recipient organisations.

Examples of organisations which the Foundation is currently supporting include multicultural focused youth organisations in Victoria, South Australia and New South Wales, namely the:

- Centre for Multicultural Youth in Victoria;
- Multicultural Youth of South Australia; and
- St George Youth Services in New South Wales.

These organisations are undertaking projects aimed at developing leadership in young people from diverse cultures to provide them with greater confidence and capacity to positively contribute to achieving social cohesion within their communities.

### The future

The Scanlon Foundation is committed to a long term program of research into social cohesion in order to make a substantive, independent and objective contribution to informed debate about the social challenges we face.

It is also continuing to work closely with the Australian Multicultural Foundation and the Monash Institute for the Study of Global Movements to use the outcomes of the survey to discuss practical measures and strategies for improving social cohesion. This has included a Roundtable meeting involving over 60 people representing Government, community, service providers, academics, business, philanthropic and media.

In addition, the Foundation will continue to support and capacity build selected community-based organisations to undertake cultural diversity and social cohesion focussed programs.

We are effectively pursuing our mission through targeted grant giving. Creative philanthropy with a clear focus on social cohesion has certainly worked for the Scanlon Foundation.

# Grantmakers online: philanthropy 2.0

Emily Turner, Web and Communications Administrator, Philanthropy Australia

The buzzword ‘Philanthropy 2.0’ describes the recent developments in fundraising and donations made through the internet. Making reference to the ‘Web 2.0’ phenomenon, and using ‘philanthropy’ in a broad sense, it describes informed giving by both individual donors and grantmakers.



Currently, much of the activity occurring in Philanthropy 2.0 concerns the flow of information between donors and fundraisers; and occasionally between grantmakers and grantseekers. But the flow of information between grantmakers and grantmakers would also benefit from application of Web 2.0 tools – a dynamic that is often left unaddressed in discussions of Philanthropy 2.0.

It is this dynamic – between grantmaker and grantmaker – that provides opportunity for philanthropy to be done differently online.

According to Greg Berry of the eCo Times blog, “Philanthropy 2.0 is about participation. It’s about using the Internet to connect people. It’s about open collaboration and higher flow of smaller donations.”<sup>1</sup> In Berry’s view, the key players in Philanthropy 2.0 include: the Causes application on Facebook – wherein charities and community organisations can solicit funding from individuals; Kiva.org, a type of no interest loans scheme where individuals can provide loans to communities, and GlobalGiving, an online intermediary service that allows donors to choose projects to donate directly to from a selection of “pre-screened grassroots charity projects around the world”.

Lucy Bernholz, noting many of these same examples, suggests that Philanthropy 2.0 simply “refers to any of the zillion efforts or applications out there that are trying to make philanthropy more interactive or user-generated.”<sup>2</sup>

But where do grantmakers sit amongst this? Berry claims Philanthropy 2.0 is “building a powerful yin to the yang of the centralized giving based in national aid agencies and huge, old, conservative foundations”. Berry’s view here is extraordinarily narrow – grantmaking is not solely the province of old, or conservative, or even huge foundations. Many philanthropic foundations in Australia today contradict most, if not all of those terms. The not-for-profit technology blogosphere’s Beth Kanter<sup>3</sup> draws more of the grantmaking side of things into the discussion by including sites such as the USA’s Givewell<sup>4</sup>. Givewell (USA) reviews those organisations and groups seeking funding, in order to provide a resource for donors who wish to carry out more extensive background research. This includes not only the individual donor, but the small or individual grantmaker. A prescribed private fund may not be ‘huge’ in Berry’s sense, and certainly not ‘old’. As with many grantmakers, they may not even be conservative – possibly setting up a foundation to better support projects that perhaps the government is too conservative to fund.

Rather than simply assessing an individual project seeking funding, Givewell (USA) allows donors to research the effectiveness and accountability of the grantseeker itself. A similar model in the UK is Intelligent Giving<sup>5</sup>, where effectiveness is ranked depending on the information provided in the charities’ annual reports. An Australian example is OurCommunity’s ‘Giving Centre’,<sup>6</sup> which provides a searchable database

of appeals and community groups. However, the flow of information is still only one way to date.

Though both Intelligent Giving (UK) and Givewell (USA) provide tools that can service both grantmakers and individual donors, there is little in the realm of Web 2.0 that services grantmakers specifically. The Case Foundation<sup>7</sup> (USA) ran a grant-matching program wherein they awarded \$500,000 to not-for-profits “whose supporters attracted the most unique donors to their cause using new and innovative online tools”.<sup>8</sup> While this is an example of a grantmaker successfully engaging with Web 2.0, it is in relation to soliciting donations, rather than improving grantmaker efficiencies or building capacity. As another approach to grantmakers utilising Web 2.0, Amy Luckey of Grantmakers for Effective Organisations (USA) suggests that the online environment is ripe for grantmakers to make use of Web 2.0 tools such as blogs, webcasts, podcasts and (RSS) aggregation.<sup>9</sup> Luckey’s proposed use of these tools, however, is to improve communications with grantees and otherwise further assist them by providing information resources.

While assisting and educating grantees will no doubt contribute to more effective grantmaking, this approach doesn’t address the vast amount of work and communication that occurs ‘internal’ to the grantmaking sector. The flow of information between grantmakers and grantmakers can also benefit from application of these same tools.

It is worth, at this point, examining the specific relevance of Web 2.0 to grantmaking organisations: why do grantmakers need to make use of ‘social media’ and Web 2.0 tools? What are their needs, as they differ from a community group or charity’s?

Naturally, these questions can't be answered without acknowledging that there are different models, motivations and attitudes amongst grantmakers, and the way that those organisations see and use technology will be quite different.

For example, 'being seen to be doing good' may be a priority of corporate/business philanthropists; private grantmakers may not wish to accept unsolicited grant applications or seek any public attention; slightly less private grantmakers who do accept grant applications may wish to publicise that fact. These (very simplified) motivations or attitudes are not necessarily 'typical', with each foundation unique in its approaches to philanthropy; and of course there are other models whose needs may differ further from the above – including community foundations, trustee companies and statutory bodies.

Also worthy of examining are the needs of the people within those different grantmaking organisations. This may include trustees, founders and board members; people for whom philanthropy is a profession (such as CEOs, program managers); and other sectoral colleagues such as academics, researchers, journalists, lawyers and consultants, who work in the field but not necessarily for a grantmaker. So what are the needs of these constituents? What are they currently doing that could be improved by better use of Web 2.0 technology?

## Connectivity

### Needs

Grantmakers place a high value in networking with each other, sharing information and experience, even working in partnership. Although many of the more established grantmakers have a long history of face-to-face networking, technology – specifically, the internet – now provides the opportunity to draw a wider range of participants into the conversation, especially those who are geographically remote.

### Tech solutions

With social media, these kinds of online conversations may occur in text-based email, chat rooms, online conference calls, or video conferencing, to name a few real-time online communication tools. Another social networking method that allows discussion but does not rely on participants being online at the same

time is creating a space for oneself online, such as a blog, email discussion list or other kind of 'forum,' where information can be shared and discussed instantaneously and simultaneously be archived.

## Privacy

### Needs

Privacy is very important for many grantmakers, for a number of reasons; they may wish to undertake networking and communication (as outlined in the point above) in a more 'safe' environment, where they can discuss their practices frankly without an audience of grantseekers, media or the general public. While one of the most lauded features of Web 2.0 is that it allows users to generate content that is 'published' on a public stage, it is possible to make use of social networking tools in more closed environments where participation is by invitation only.

### Tech solutions

There are many Web 2.0 tools that allow privacy while retaining inter-connectedness and dialogue. These include email discussion lists/forums such as Google Groups, which form 'protected' areas where users can engage in discussion, collaborate on documents, browse archived discussions and receive messages via email. It can also include spaces like blogs, which allow subscription to and sharing of information by one or multiple authors, and subsequent discussion via comments – privacy in this case is only a matter of setting up the blog software in a password-protected area of a web server, or (as is often the case when blogging via a free service) adjusting in-built security settings to restrict which users may read and reply.

## Information sharing

### Needs

Grantmakers benefit from having access to the information provided by intermediaries when researching grant applications, and from sharing information generated within their organisation with peer organisations. That includes resources such as feasibility studies, and material that concerns the practice of grantmaking – such as performance reviews of projects that may not have succeeded, guidelines for the grantmaker's trustees, or information on working within the foundation's legal (taxation) limitations.

## Tech solutions

Web 2.0 maximises the value of information through providing grantmaker forums to organise, archive and share the knowledge and material that they each own. The wiki model allows multiple authors to contribute material directly to a website, which is then dynamically organised in order to be browsable and searchable (where information is archived and retrieved after a period of time) as well as being able to see and subscribe to most recent additions (providing immediate dissemination of new information). The PhilanthropyWiki<sup>10</sup> is such a vehicle that we recently established for just this purpose, using open source software that we customised: only grantmaking Members of Philanthropy Australia can contribute information and there is also the ability to password-protect material, so that only fellow grantmaking members have access to it.

Note: Many of these ideas first appeared on Emily's personal NFP tech blog, <http://www.worldgrowswide.net/>

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3. Kanter, Beth, 'Transparency and Authenticity: What do they mean for non-profits?', [http://beth.typepad.com/beths\\_blog/2008/02/transparency-an.html](http://beth.typepad.com/beths_blog/2008/02/transparency-an.html) accessed 29 April, 2008.
4. <http://www.givewell.net/>, accessed 29 April 2008.

Note: Givewell.net is not associated with the Australian Givewell.com.au, which provides research services for informed giving.

5. <http://www.intelligentgiving.com/>, accessed 29 April 2008.
6. [http://www.ourcommunity.com.au/giving/giving\\_article.jsp?articleId=516](http://www.ourcommunity.com.au/giving/giving_article.jsp?articleId=516), accessed 6 May 2008.
7. <http://casefoundation.org/>, accessed 29 April 2008.
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# Feature interview: Simon Monk

*Simon Monk is a social entrepreneur who embodies a new style of giving. The founder and director of The World Nomads Group, a global travel technology and marketing company, Simon and his team established the Footprints network, an alliance of e-commerce businesses and their customers who fund community projects from donations collected from their customers during online transactions*

Footprints collects many small donations from people already shopping online all around the world. The Footprints software application is available free to any company doing e-commerce, providing a ready-made corporate social responsibility (CSR) vehicle. The beauty of it is that it establishes a direct and meaningful connection between the business, the customer and the project they have chosen to donate to.



## Is there a symbiotic relationship between travelling and giving?

I grew up in the north of England and my role models were mountaineers. Doug Scott, a mountaineer who runs treks to Nepal, was a key influence on me. The entire profit from his trekking operation goes back to the villages he knows from his travels. Travelling puts your own life in perspective – you can't walk away from some places unaffected.

The initial impetus for Footprints came from me, but many of us in the organisation have travelled widely, and it resonated with all staff that we should be giving something back to the communities we visit. If it resonates with your staff it's likely to resonate with your customers, so it works at a business level too. In fact, there isn't a clear delineation between Footprints and my company World Nomads. We don't fund Footprints or have a budget for it, it just forms part of the mix: we promote it and get partnerships from it, so it's just an integral part of our business, a device that works.

## Why does it work?

We're trying to work that one out too! You couldn't invent it up front if you tried. You just have to take the journey and work it out afterwards. We just knew that there is a moral responsibility what when you travel, and you travel in places where somebody's annual salary might be \$200 a year, and you're a wealthy backpacker, you have a responsibility to give. And that works at many levels – just by going there you are contributing to those communities.

## How did Footprints come about?

We literally started with an idea; a pencil sketch on the back of an envelope. We had been considering a CSR venture for a while, um-ed and ah-ed for about a year and then the tsunami happened in December 2004. At that point we said 'let's just build something', and so we sketched it up and built it within a week. Four months later we'd raised \$50,000!

We refined Footprints over the course of the next year, and then opened it up to other companies as an e-commerce donation solution. Several asked "how do we know our sales conversion rate won't go down?" so we took one of our travel companies we'd bolted Footprints into and looked at the volume of sales before and after we added Footprints, and discovered that sales had actually gone up by 1.87 per cent, which was worth \$20,000 a month. That was quite unexpected. I would have predicted at best neutral, but in

hindsight the products that we sell have an element of trust about them, and the fact that you're associating yourself with brands in the not-for-profit space such as The Fred Hollows Foundation, for example, probably helps build that trust.

## What kind of projects does Footprints focus on?

One of our ideas with Footprints was to make everything quite tangible so each project has an outcome which you can see and feel and touch – like building a well or a school. Footprints focuses on health and water and sanitation and education – the pillars of getting people moving ahead. We use Maslow's hierarchy of need as a basis, which says that if you can get people past needing the essentials of life – water, food, warmth, security, health, shelter – they take care of themselves. So this is where we focus our energies. We think we should offer three or four projects only, in one transaction, for customers to choose from when they donate, and we can change those on offer to fit the project to the transaction the customer is undertaking – for example if you're paying an electricity bill you would be offered the opportunity to support a project to give solar power to a village in Nepal. Keep the list small, and make it easy for the customer to say yes.

We were looking for projects to assist Indigenous people in the Australia, and one Indigenous community came to us and asked for some drums. We were rather surprised, but we needed to

be educated to understand that the purpose wasn't the drums, the purpose was health outcomes. The drums came at the request of the elders at the village because they knew that if they put drums in school and said 'you can't touch them until the end of the day' the kids would go to school and learn about health. I went to the Garma

#### What's next on your social entrepreneurship agenda?

If there's one thing I dream of it is taking Footprints to scale, turning it into the low cost low donation online mechanism. I would like 10,000 of the top e-commerce companies in the world to be using Footprints – it would raise hundreds of millions of dollars if every

With the internet, an e-commerce company sells their products everywhere and might take donations from anywhere so you simply can't be compliant with fundraising laws from every nation at the same time.

If you want to choose who you give money to, and take donations from, globally you don't want to be beholden to any specific government as to whether or not that is approved. As an example, we had a couple of doctors travelling and working in Kazakhstan who wanted \$500 to purchase the drugs to fund their clinics. They're not a charity, don't have DGR, but are doing great work and we wanted to give them \$500. They provided acquittal reports and receipts so that grant was transparent, but we can't claim any of it. That doesn't work for us – and as we want to scale up Footprints we need mechanisms where we're not going to have to pay millions of dollars in tax.

**"I would like 10,000 of the top e-commerce companies in the world to be using Footprints – it would raise hundreds of millions of dollars if every single time you came to buy something online, from any business, there was a little checkbox that said 'just add 20c or \$1.00 for charity'."**

Festival and one of the key take-outs for me was 'don't pre-judge what works in communities – take advice from the local community and go with the flow'. If they say they need drums you can do your due diligence, measure it and trial it, but as long as it delivers outcomes then do it. The drums were completely left field, but they delivered the desired health outcomes. Again you couldn't have made this up, you need to work and learn as you go. This is the entrepreneurial side, and it's the exciting part of the work.

#### Are all your grants small?

The benefits of seemingly small projects roll-out and multiply: for example in Nepal we built a well, and because they didn't have to cart water the children could go to school, and because the children were at school the women could go to work and because the women were working and earning there was a power shift in the village. Even the aid agencies have been flabbergasted at the by-products of very small grants. That's the part of the social entrepreneurship that I find absolutely fascinating, all the rules are being rewritten and there is much more flux than we've seen in the last hundred years.

single time you came to buy something online, from any business, there was a little checkbox that said 'just add 20c or \$1.00 for charity'.

We're not asking for even \$10 – it's just about rounding up a bill to the nearest dollar, or from \$2.50 to \$5. I'll take even 1 cent per transaction, because the cost of the transaction to us is zero.

#### How do you deal with tax deductibility?

We don't – we don't offer a tax deduction facility. We bypass that, believing that if you can afford to throw a dollar in a charity bucket in the street then you can afford to tick the dollar donation box online, without the tax deduction option. We've had customers asking if they can give us \$150 for one of our projects, and the answer is 'no, you can't'. We'll suggest they go to an organisation like Oxfam which runs projects and donate through their website.

With Footprints, one of the issues we've run into is that, when you raise money, if you're standing on the street corner or holding a raffle in Australia you are physically in Australia, so you need to abide by the fundraising laws in this country.

#### To combat that problem what would you like to see the government do?

The trick here is that it's not just 'our' government but all governments around the world. As with internet e-commerce, for global undertakings the rules are still being made up as you go along. In terms of defining our business, World Nomads is a micronational with only 50 people. The internet allows you to do that. The rules are being written as we speak; nobody has yet defined how to be a micronational, or fund venture philanthropy globally, so in this environment innovation and entrepreneurship, business and social, is thriving.

# Shooting beyond expectations: documentary and philanthropy

By Mary Borsellino, Assistant Editor, 'Australian Philanthropy'

Audio-visual media is a persuasive and powerful way to make a large number of people aware of an issue very quickly. One only has to look at the massive impact Al Gore's documentary film 'An Inconvenient Truth' has had on worldwide environmental policy to understand that, or follow the consistently controversial career of the American activist and 'troublemaker' Michael Moore.

The aspects of the world which are the recurrent topics of documentaries – environment, the arts, social welfare, Indigenous issues, education, health – are also fields of especial interest to many philanthropic trusts and foundations, families and individuals. The benefits are not all one-way however, as charities providing on-the-ground support services and effecting change on the coal-face, and documentary filmmakers engaged in education and promotion of social change efforts, can also benefit hugely from cross-sectoral collaboration.

Until recently, however, creating a relationship of this kind was complicated by the differing structures of the philanthropic and film-making sectors. The majority of trusts and foundations were unable to fund organisations which were not DGRs (Deductible Gift Recipients), and almost no professional documentary teams had this tax status.

**Documentary Australia Foundation**  
An innovative new foundation has been created to deal with this conundrum, the Documentary Australia Foundation. Conceived and supported by The Caledonia Foundation<sup>1</sup>, the Documentary Australia Foundation is an information-rich resource, providing a window of understanding for grantmakers and charities to see how documentaries can increase the effectiveness and reach of their programs, and for filmmakers to learn how to engage partners and work collaboratively with people from the not-for-profit sector.

Penny Richards, executive director of the Documentary Australia Foundation, explains, "We're not wanting philanthropic foundations to support documentaries for documentary's sake, it's about actually helping raise the awareness of issues – homelessness, landmines, refugees – and using the documentary as a vehicle to increase the effectiveness of grantmaking to these issues."

"I think it's the old proverb about a picture being worth a thousand words," explains Sam Meers, a Documentary Australia Foundation director, and executive director of The Nelson Meers Foundation. "Social issues can be well-explained and illustrated by documentaries. They're an excellent visual tool, which gives immediacy and closeness to what they're imparting to the viewer. This increases the effectiveness and impact of grants."

"The Nelson Meers Foundation's next documentary is with the Australian Conservation Foundation, which we began work on before Documentary Australia was on the map. The documentary that we are doing together is going to be about Al Gore's climate project," says Sam Meers. "It's a personal story of the Ambassadors for Climate Change, and why they're doing what they're doing. Making it so personal is extremely effective and valuable, because it lets the viewer think about the issues in an accessible context and put faces and personalities with the ideas."

## Impact beyond expectations

As an innovative tool for grantmakers, documentaries can often have unexpected and far-reaching impacts. "If you'd told me when we started Footprints two and a half years ago that we'd be making documentaries for National Geographic I would have just laughed," Simon Monk<sup>2</sup>, founder and director the travel companies World Nomads and its giving initiative Footprints, admits. "Our marketing manager at World Nomads suggested we make a documentary about one of our projects, a bunch of people going to renovate a school in Nepal. Four months later we have a 20 minute documentary, a very inspiring feel-good story."

The story gets more interesting, however, when Footprints put their documentary up on YouTube, where it was viewed by tens of thousands of people. Fifteen airlines took the documentary – offered to them free of charge – and now screen it as part of their in-flight entertainment. It was then pitched and sold to National Geographic, who are now funding Footprints to make a series six of documentaries about the different projects being undertaken around the world. The reach of this initial documentary, as both a public awareness tool and a marketing piece, has impacts way beyond any initial expectations.

Documentary is not simply a little-used movie genre; it is a distinct medium of its own, one with a staggeringly wide range of applications. Documentaries can give voices to those groups and members of society who might otherwise remain silent and unseen. This empowerment is an immeasurable step in giving dignity, encouragement and assistance to disenfranchised persons. Other sectors of the community benefit hugely as well, as they are provided with an opportunity to view firsthand what life is like for people whose experiences are unlike their own. It can also be used as a platform for those with specialised knowledge, through which they can educate an audience and pass along a deeper understanding of the world.

'Kanyini', produced by a partnership of organisations including the Macquarie Group, the Northern Territory Film Office, and Rio Tinto Aboriginal Foundation, is the tale of why Indigenous people are now struggling in a modern world and what needs to be done for Indigenous people to move forward, told by Aboriginal man Bob Randall. Kanyini was voted 'best documentary' at the London Australian Film Festival 2007. It was also winner of the Inside Film Independent Spirit Award and the winner of the Discovery Channel Best Documentary Award in 2006.

The documentary 'The Oasis', about a group of Salvation Army volunteers and the community of homeless youths they work with, was viewed by over a million people when it screened on the ABC in April 2008. "The Oasis" has assisted with putting youth homelessness on the agenda," says Ian Darling<sup>3</sup>, the producer and co-director of the documentary and Chair of The Caledonia Foundation, which provided funding for the outreach and education components, including sending the DVD of the documentary to all secondary schools around Australia and the creation of an interactive study guide on the Oasis website. "By providing the DVD to all secondary schools – which should last, we anticipate, for 10 to 15 years – the same message will be spread each year to a different groups of kids, hopefully leading to social and policy change that will make a lasting difference, a sustained impact."

## DOCUMENTARY AUSTRALIA FOUNDATION

A PHILANTHROPIC INITIATIVE



[www.documentaryaustralia.com.au](http://www.documentaryaustralia.com.au)

Corporate foundations and organisations can also reap significant benefits from supporting documentary filmmaking. General Motors have given over US\$100 million to the films of Ken Burns, such as 'The Civil War' (1990). As Ian Darling points out. "That was pure philanthropic grantmaking – they're not trying to sell cars – and they're the most watched documentaries in the United States, have a really extensive education and outreach campaigns, which the Macarthur and Pew foundations and General Motors, who funded this, see as their gift to the nation, to educate millions of school children about what happened in their country's history."

Documentaries don't, however, need an audience of millions in order to make a profound social difference. Some of the most effective documentaries weren't actually intended for broadcast audience. "You can make a film about, and for, a local community and it can achieve the most profound things," says Penny Richards. "A documentary about a Tiwi football team called 'In a League of their Own', which probably will go to broadcast, but was initially created for the narrow cast, is a case in point. The outreach and education campaign has such potential for impact – the film will be taken around all the Indigenous

communities in the Northern Territory, highlighting the importance of sport and health and role models. The creation of the football team has given these children the opportunity to go to training regularly and play matches, building team spirit and that extends to their families too, building a sense of community. There's enough evaluation and evidence out there to say that the return on social capital can be quite high."

Indeed, the return on social capital offered by investment in documentaries is almost unprecedented, offering as it does the kind of long term potential for widespread impact found with seed funding, as well as the immediate opportunity to support the arts – in the form of the film-makers themselves – and the subjects of the documentary through observation, collaboration, and understanding.

1. See page 10 for an article on The Caledonia Foundation.

2. See page 24 for an interview with Simon Monk.

3. See page 16 for an interview with Ian Darling.

# Addressing the space: creative intermediaries supporting the givers

By Ivana Jirasek, Coordinator, Artsupport Australia

In the equation of philanthropy, most people are familiar with two parts; there are those who give and those who receive.

There has been a rising tide of Australian philanthropy over the last decade, bringing changes in its wake, and now there's a growing intermediary set of players who are working to make giving easier – with some creative results.

For those who give, the motivation is often based on a desire to see positive change in communities. For the high volume of philanthropists entering into this sometimes complex territory, return on investment and efficiencies which will allow their investment to provide maximum benefit, can be a high priority.

With over 600 new prescribed private funds, a niche market has evolved for providers to address these needs and offer guidance and expertise. In this new field are legal, financial and tax advisors, consultants who assist with grantmaking policies, processes and evaluation, and even those who'll research suitable grant prospects and mentor the parties through the negotiations. Active intermediaries include Social Ventures Australia, Givewell, The Greenstone Group, Enrich Australia, Artsupport Australia and a growing number of consultants.

A closer look at the work of one such agency – Artsupport Australia – illustrates what's involved and what can be gained by drawing on the expertise of an intermediary.

Artsupport Australia works closely with government, cultural, corporate, financial and philanthropic sectors to develop effective strategies for giving. As a free service of the Australian Government, it provides resources and mentors for individual philanthropists, foundations and trusts, as well as not-for-profit organisations, to build long term philanthropic partnerships.

Since its creation, Artsupport Australia has facilitated over \$15 million of philanthropic donations and grants to



*Children participating in The Michael Leslie Pilbara Performing Arts Program, who have named themselves the Yirramugardu Majik Binbilas (translates as the Roebourne Magic Grasshoppers). This is an arts program that addresses young Indigenous people in remote and disadvantaged areas.*

not-for-profits, mostly for projects that address social disadvantage, ranging from homelessness, literacy, at-risk youth, social justice, health and work in Indigenous, dysfunctional and isolated communities. It comes as a surprise to many that these projects were all delivered by arts organisations. Whether it's outreach theatre programs for the homeless in Sydney, or art-making programs in the Northern Territory providing skills and resources to Indigenous women to earn an income while continuing their culture, the arts often provide innovative solutions to social dilemmas.

For many of the beneficiary organisations, philanthropy brings the key resource that allows their projects to begin, or reach their full potential.

Established in 2003 under the auspices of the Australia Council for the Arts, Artsupport Australia draws on the Australia Council's vast national database of more than 500 cultural organisations to identify projects that can match any philanthropic proposition. They have a common vision to demonstrate that the arts offer effective and innovative strategies for positive social change.

As an intermediary, Artsupport Australia builds strong relationships with philanthropists and foundations through one-to-one meetings to understand their aspirations and funding priorities. It

is especially of value to small foundations that do not have any paid staff. It also works with arts organisations to better understand their projects and to prepare them for philanthropic engagement.

Philanthropists who may be at a loss to pin down a specific organisation to support in a given area of interest could be greatly assisted by Artsupport Australia. The process of researching and short-listing suitable options is a free service and one which has led to many successful outcomes. Artsupport Australia has developed a particular expertise in sourcing options for philanthropists in the areas of social disadvantage and Indigenous issues.

As part of this service, Artsupport Australia also provides a mentoring role for both grantor and grantee, for as long as is required, to manage expectations and help develop long term relationships. One long term client has been the Westpac Foundation, which sought Artsupport Australia's ongoing input after it introduced 'arts' projects into the Foundation's mix of proposals for the first time. The arts projects have been selected to match the Foundation's charter; to help disadvantaged communities build social enterprises. One of these was an organisation that publishes contemporary Indigenous literacy materials, using stories and artworks from Indigenous writers, artists and communities. In 2007, the Foundation supported all five arts projects it proposed, to the tune of nearly \$950,000.

In the labyrinth of options and questions that face philanthropists, intermediaries fulfil important roles. Rather than making the equation of philanthropy more complicated, intermediaries are bringing givers closer to resources and beneficiaries. Acting like any good catalyst, intermediaries are making this experience easier and bring faster results – and that can only be a good thing.

*For more information about Artsupport Australia refer to [www.australiacouncil.gov.au/philanthropy](http://www.australiacouncil.gov.au/philanthropy) or contact Louise Walsh, Director at [l.walsh@australiacouncil.gov.au](mailto:l.walsh@australiacouncil.gov.au)*

# Back to school – lessons learnt by HBOS Australia Foundation

By Andrew Huckel, HBOS Australia Foundation, Group Manager



Increased confidence, an ability to set goals, improved communication skills, and a belief that they have a concrete foundation for their future are just some of the positives which have emerged for the Year 11 graduates of the 2007 HBOS Australia Foundation Manager Matching Program.

The Manager Matching Program began as a pilot with four students in 2006 and has grown due to its success. It is now an integral part of the HBOS Australia Foundation calendar and its philanthropic ideals. The 2008 program is currently underway and initial signs are that it will be the best to date.

This innovative program involves eight Year 11 students from Ashcroft High School, who are matched with a senior HBOS Australia manager for the duration of the scheme. It runs over eight sessions and culminates in a presentation evening for parents, teachers and HBOS Australia managers including CEO David Willis.

Ashcroft High School is based in the less affluent south-western suburbs of Sydney. Like many nearby areas, unemployment levels are higher than in other parts of Sydney and for those who do work, manual labour, retail or blue collar work is the norm. The area has a low rate of residents who have gone onto further study after high school. One of the program's aims is to inspire students with potential, who may lack the requisite confidence, knowledge or connections, to enhance their lives and become all that they can be.

The participants are chosen by a panel including the school principal, senior teachers and graduates of the previous year's program. Each of the matched students chooses a topic which they are passionate about, and develops a presentation over the course of the program which is then showcased at the final dinner.



Left to right: Ted Noon (Principal, Ashcroft High School), Brad Spencer (Manager, BankWest), Beni Nawai (2006 Graduate of Inaugural HBOS Australia Manager Matching Program), and David Willis (CEO HBOS Australia).

The program was inspired by the initiatives of the Australian Business and Community Network (ABCN), of which HBOS Australia was one of the founding members. The ABCN brings national business leaders together to create positive social change through practical programs which engage students, educators and business people.

HBOS Australia CEO David Willis is a passionate champion of the Manager Matching Program and believes the benefits for the students – and the mentors – are overwhelming and almost impossible to measure.

“There is nothing more rewarding than having a student come up to me and tell me that before this program, they really didn't know what was in store for them down the track, and that their experience with their HBOS Australia mentor had inspired them, and set them on a career path that they didn't believe was possible,” he explains.

David has also participated in the program – in a slightly different way. Prior to the program's development, he personally mentored Ashcroft High School Principal Ted Noon. This ongoing relationship was the genesis of the Manager Matching Program.

According to David Willis, the satisfaction he has personally gained from the program, coupled with the response from colleagues involved, has cemented the inclusion of the Manager Matching Program into the curriculum of the HBOS Australia Foundation.

“When you embark on a mentoring program like this, it's the benefits to students which are paramount and are foremost in one's mind. But the lesson we have learnt in the last couple of years is that everyone benefits. Mentors get great personal and professional satisfaction out of helping students develop their confidence and skills. We have also learnt that by engaging with a school in this way you really get to know and understand many of the socio-economic issues affecting the surrounding community. This in turn allows you to work closely with the school to tailor a program that is relevant to the needs of the students.”

This depth of engagement has resulted in the development of a UK Sabbatical Teachers Program, which is now being piloted. It involves Mr Noon and another teacher from the school. Depending on the success of the pilot, the aim is to run the program every year for one Ashcroft High School teacher.

The visit, which is funded by HBOS Australia and its parent company HBOSplc, is currently underway and is involving visits to seven selected UK schools and the UK education department. The purpose of this program is to allow Ashcroft High School to build relationships with schools which have faced similar teaching hurdles and have implemented successful programs to overcome these.

# Vale Patricia Feilman OAM

Philanthropy Australia is deeply saddened at the passing away of Pat Feilman on 28 May 2008.



“Pat’s contribution over many years, particularly in the field of conservation and the environment, made her a recognised leader in the Australian philanthropic sector. She was instrumental in contributing to the development of the Potter Farmland Plan.”

Patricia Feilman OAM will be well-known to a great many of our Members and friends from her 36 years as Executive Secretary of The Ian Potter Foundation, a position she held from the Foundation's establishment in 1964 until her retirement in December 2000.

Pat was closely involved in the initial negotiations to set up The Ian Potter Foundation and was the Foundation's sole staff member until 1991, while also remaining involved in Sir Ian Potter's business affairs and running her own plant nursery. Sir Ian had great faith in her judgement, and according to his biographer Peter Yule, Pat's abilities in networking and negotiation 'rivalled those of Ian Potter himself.'

Pat's contribution over many years, particularly in the field of conservation and the environment, made her a recognised leader in the Australian philanthropic sector. She was instrumental in contributing to the

development of the Potter Farmland Plan and other environmental projects backed by The Ian Potter Foundation. In 1990 she was awarded an Order of Australia for her contribution to philanthropy.

Pat was a Governor of the Feilman Foundation and Trustee of The Norman Wettenhall Foundation, and her other contributions to public and community life were extensive. Her previous appointments include Chairman of the Little Desert Flora and Fauna Foundation, Chairman of the Council of the State Film Centre of Victoria, Chairman of the Zoological Board of Victoria, Executive Director of the Australian Landscape Trust, member of the Australian National Commission for UNESCO, Trustee of the Trust for Nature, and member of the Council of the Nurserymen's Association of Victoria. She was a keen gardener and collector of art.

Along with Meriel Wilmot, then Executive Secretary of The Myer Foundation, Pat Feilman was one of the 'godmothers' of Philanthropy Australia, instrumental in the organisation's establishment and in fostering bonds between philanthropic trusts. She continued to be a great friend to Philanthropy Australia, serving as Council Member and Secretary for several periods of time, and helping to host Philanthropy Australia in rent-free office accommodation with The Ian Potter Foundation. Her contribution was recognised with the awarding of Life Membership of Philanthropy Australia on her retirement in 2000.

Pat Feilman was in her 83rd year and is survived by her elder sister Margaret. For her strength of character, her sharp mind, her passion for conservation and her concern for the disadvantaged, she will be remembered, missed, and celebrated.

# Members of Philanthropy Australia

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

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Nelson Meers Foundation	Australian Museum	The State Library of NSW
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Philanthropy Australia is the national peak body for philanthropy and is a not-for-profit membership organisation. Our Members are trusts and foundations, families and individuals who want to make a difference through their own philanthropy and to encourage others to become philanthropists.

**Our vision:** A giving and caring nation.

**Our mission:** To represent, grow and inspire an effective and robust philanthropic sector for the community.

**Philanthropy:** The planned and structured giving of money, time, information, goods and services, voice and influence to improve the wellbeing of humanity and the community.

**Philanthropic sector:** Trusts, foundations, organisations, families and individuals who engage in philanthropy.

Front cover: Our front cover photograph is of 'The Oasis' documentary film production team – from left Producer and Director Ian Darling, Editor Sally Fryer, and Co-Director and Cinematographer Sascha Ettinger Epstein from Shark Island Productions – with a collection of framed stills from the making of the documentary in the background. We feature an interview with Ian Darling, also Chair of The Caledonia Foundation, on page 16, and explore the potential for documentaries in philanthropy on page 26.

*Photo by Anna Thompson, courtesy of The Salvation Army's Pipeline magazine.*

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