



Australian Philanthropy



PHILANTHROPY
Australia

Spring 2009, Issue 74



Social inclusion: addressing systemic imbalances

■ Peter Shergold presents his agenda for citizen empowerment

■ Patricia Faulkner on why social inclusion is not just a buzzword

■ Mary Crooks fights exclusion with a gender lens

**Australian Philanthropy is the journal
of Philanthropy Australia Inc.**

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 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.

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The articles in *Australian Philanthropy* do not necessarily reflect the views of Philanthropy Australia Inc or of its Members.

Published by Philanthropy Australia
Design and production by MDM Design Associates
www.mdmdesign.com.au

Registered by Australia Post as a Print Post
Publication – 581/827/0058
ISSN: 1449-390X

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Printed on carbon neutral, 100% recycled paper (post consumer waste) and manufactured under the environmental management system ISO 14001.

Front Cover

Our front cover photograph shows performers in the Tutti Ensemble, a socially inclusive music theatre and opera organisation, at the World Youth Concert, Adelaide Entertainment Centre, July 2008. Read about Tutti, on page 22.



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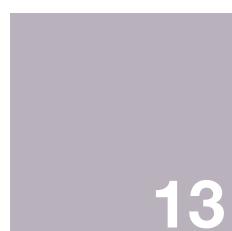
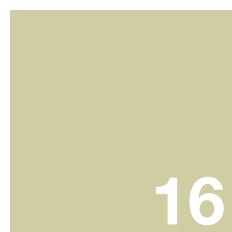
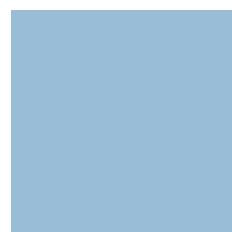
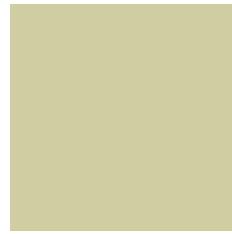
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From the CEO



On one of my many trips to Canberra I had the opportunity to hear, on ABC Radio National, Cape York Indigenous leader, thinker and activist Noel Pearson give his opening address to the Brisbane Writers Festival. He talked about the road to Indigenous advancement, the relationship between self interest and altruism, and how he believes the rights of Aboriginal people in Cape York have been trampled on by government and urban environmentalists. It is a powerful address which I encourage you to read or listen to at www.abc.net.au/rn/foraradio/

I was particularly taken by Pearson's thoughts on the relationship between self interest and social progress when discussing development for Indigenous communities. He says that people are motivated by incentives; they see better prospects and make rational decisions in their own self-interest to improve their lives. Importantly, using the metaphor of a staircase of opportunity, he posits that:

"...it's individuals who climb stairs. Entire communities don't walk upstairs all at once. That's not how the world works. Stairs are climbed by individuals clutching their children to them and taking them up a few rungs at a time. And the people in this room are people whose great-grandparents climbed those first few miserable rungs out of the potato bog in Ireland or the coal mine in England. And they sent grandfather up, to climb a few more stairs. And father had the opportunity to go to university in the 1950s, and now our kids are heading there too. So we're climbing the stairs of opportunity and we've done so out of our own interest. We've utilised the power of choice to make our lives better."

He goes on to say that there is no "social justice forklift" yet invented to lift entire communities up to a better life.

"You want social progress? Well, social progress is the sum total of many thousands of individual progressions. You have lots of individual progress, you have social progress. You have social progress, you have social justice. But stop dreaming that social justice is about one day, some beautiful person in government is going to invent the forklift that has hitherto not arrived."

These are provocative words for those of us in philanthropy. In this issue of *Australian Philanthropy* we take a long hard look at the concept of social inclusion, one pathway to social justice. It's about making sure that everyone in our society has the opportunities

they need to 'climb the stairs,' and recognising that some need more of a hand-up than others to get to the first rung.

As Patricia Faulkner explains in the feature interview on page 10, leveling the playing field is not enough, as some disadvantaged people can't play on the playing field, even if it is level. "People living with entrenched disadvantage need others to reach out and accommodate their particular needs: often extra support is required just to bring people in to access existing services." Social inclusion is not about equality, everyone having a fair share of the pie, but equality of opportunity.

Peter Shergold, in his inspirational article on page 5, laments that the very framework within which services are provided, traditionally government intervention in the form of payments to and programs for excluded groups, "too often serves to reinforce the sense of social exclusion that it seeks to overcome." He proposes instead strategies for citizen empowerment:

"By enabling people to participate in the design of their own public support – by allowing them to become 'co-producers' of the services they need – an inclusive society can be built. Its fundamental premise is that individuals, acting separately or in concert, can be given the opportunity to be placed in control of their own future."

What comes through in these articles is that as a society we are now more receptive to change than in previous decades. As Robert Gottlieb, from *Business Spectator*, points out, Australia is looking increasingly like an emerging economy with massive population growth, infrastructure development and growing wealth. At the same time we have experienced considerable social upheaval with the global financial crisis on top of various natural disasters.

The soul searching that these events have given rise to has created opportunities for philanthropy to grow and mature. While it may take generations to eradicate the kind of entrenched disadvantage that some communities face, there is a willingness now to name and measure problems previously hidden, and a commitment to finding better approaches to mitigate or solve these problems. Collaboration is at the forefront of this approach. ■

Gina Anderson, CEO, Philanthropy Australia



From the President



Much of the work of foundations is directed towards social inclusion and throughout the history of philanthropy people with disabilities have benefited significantly from the generosity of benefactors and trustees.

For families, philanthropy in all its forms, including fundraising, has often been the difference between a child having or not having an essential wheelchair or a communication device or a car modification which will allow a heavy electric wheelchair to be transported.

For disability organisations, donations and bequests have long been a major source of funds for essential capital works programs and to meet shortfalls in government funding arrangements, which rarely meet the full costs of service provision.

Nearly 30 years ago, in 1981, the inclusion of people with disabilities was marked when Australia celebrated the International Year of Disabled Persons. At the time, people with disabilities and their families saw this as a landmark; the dawn of a new era. Since then, Australian governments have continued to present an image of a caring society based on the inclusion of people with disabilities.

For example, in 2001 the Victorian government launched the *State Disability Plan 2002 to 2012*, which promised to embrace all people with disabilities, based on individual choices and an inclusive Victorian community. However, sufficient resources to underwrite this plan have never been provided and so it has failed to achieve its goals.

In April this year the Parliamentary Secretary for Disabilities and Children's Services, the Hon. Bill Shorten, described disability as "the last practical barrier for civil rights in this country". In August the lack of significant progress towards the inclusion of people with disabilities right across Australia was fully detailed in *Shut Out: The Experience of People with Disabilities and their Families in Australia*. Based on more than 750 submissions and the views of more than 2,500 people who attended the public consultations, *Shut Out* paints a disturbing picture of marginalisation and exclusion.

Why, despite the stated commitments of governments to inclusion and a strong and sustained effort from philanthropy, are people with disabilities still largely excluded from an ordinary life and a fair go in Australia? Largely because the welfare and charity model, started a century or so ago to support people with

disabilities, has now been totally overwhelmed by demographic forces and social change.

The cost of future care and support for people with disabilities should be considered a liability on the nation's balance sheet. It is growing and the share that can be met through the informal care system is declining. This has fractured the current welfare and charity approach to the provision of care for people with disabilities and support for carers, who are increasingly emotionally, socially and economically isolated.

Tragically, in some recent cases, families who have lovingly cared for their disabled children for decades have tried to kill them because the future was so bleak. Others have abandoned their children as they no longer have the strength to continue.

However, within this depressing picture some positive signs are emerging and philanthropy is playing an important role as a source of innovation and systemic change. At the 2020 Summit one of the 'big ideas' was a National Disability Insurance Scheme (NDIS) and Gina Anderson, who attended the Summit, helped put the NDIS on the national agenda.

A NDIS would shift disability services from the current crisis-driven welfare approach to a planned insurance model. Services would be provided based on needs and would include essential care, support, therapy, equipment and access to education, training, work and the community. This would close a huge gap in Australia's current social security safety net through which people with disabilities and their families fall. A NDIS would transform the lives of people with disabilities and their carers. A government inquiry of which I have been a Member, the Disability Investment Group, has been investigating this idea in some detail.

However, more work needs to be done and wide community support is needed. It is therefore very pleasing that The Myer Foundation, Helen Macpherson Smith Trust, Pratt Foundation and The William Buckland Foundation are all contributing to the development of this vital innovation that could, literally, underwrite the inclusion of people with disabilities in Australia, at long last¹. ■

Bruce Bonyhady, President

1. For more information on the National Disability Insurance Scheme go to Philanthropy Australia's Disability Affinity Group or www.ndis.org.au

Retiring Chairs

Philanthropy Australia salutes two of the 'elder statesmen' of philanthropy who have announced their retirement.

Robin Hunt has retired as Chair of the Sunshine Foundation after over 30 years as a trustee. Robin has been a stalwart of the philanthropic community for many years, and is a former Council Member and Vice-President of Philanthropy Australia.

Margaret Ross has retired as Chair of the John T Reid Charitable Trusts. A trustee since 1976, Margaret became Chairman of Trustees in 1985 and has held that position since that time.

We wish both Robin and Margaret all the best.

Henry Review and Productivity Commission

Philanthropy Australia has been working on two major federal government reviews. The Productivity Commission has released a draft report on the *Contribution of the Not-for-Profit Sector*, which makes a number of key recommendations with relevance to philanthropy and the sector as a whole. Further consultations will now take place and submissions in response to the draft report are invited before 24 November 2009. More information: www.pc.gov.au

In May 2008 the federal government announced Australia's Future Tax System Review known as the Henry Tax Review. It is possible that the Henry Review will recommend some significant changes to the current taxation arrangements for the not-for-profit sector which are likely to have a profound effect on its activities, including the philanthropic sector. Philanthropy Australia made a brief submission on the importance of dividend imputation and franking credits to the efficiency and fairness of the tax system and in particular to the philanthropic and charity sectors. Our submission can be found on our website: <http://www.philanthropy.org.au/pdfs/philaus/PA-Henry-Tax-Review-Submission.pdf>

The Projects Pool – sharing project recommendations

Designed as a tool for our Full Members to share information about projects, the Project Pool is a reservoir of recommended projects for which non-profits are currently seeking funding. Each project listed has been recommended by a Philanthropy Australia Full Member – usually one which a Member has received an application for, and assessed as outstanding, but cannot themselves fund.

Using the Projects Pool, Members can recommend projects for funding to colleagues and seek out projects which come recommended by other funders, having had initial due diligence undertaken. The Projects Pool offers a convenient, discreet and secure way for our Full Members to share project recommendations.

To access the Projects Pool go to our homepage and click on the link under Membership, or go direct to www.philanthropy.org.au/projects. We are looking forward to filling the Pool with great projects, furthering collaboration and growing philanthropy.

Addressing Homelessness Affinity Groups launched

In response to Member feedback, Philanthropy Australia has established two new Affinity Groups for Members with an interest in funding around the issue of homelessness. Together these have a national focus and will concentrate on collaboration, sharing research and best practice models for effective grantmaking and liaison with government.

Shane Austin, Community Programs Manager at the Lord Mayor's Charitable Foundation, is the inaugural Chair of the Melbourne-based group, which was launched at the Melbourne Town Hall in June. The Sydney group was launched in September and has three joint chairs who each bring complementary experience to the role Annette Bain the Executive Director, Freehills Foundation and Pro Bono Counsel, Freehills; Felicity Reynolds Chief Executive Officer of the Mercy Foundation and Malinda Wink, Executive Director of Caledonia Foundation.

As with other Affinity Groups, these are open to Full Members only and each will meet three to four times per year and together utilise the dedicated email listserv for sharing information and events.

PPFs are now PAFs

The new regulatory regime for Private Ancillary Funds (PAFs) commenced on 1 October 2009. Existing Prescribed Private Funds (PPFs) became PAFs on that date.

The Australian Taxation Office will be contacting existing PPFs to advise them of the changes and of the steps they will need to take to transition from a PPF to a PAF. They expect the transition period to take some months. There is a PAF website at:

<http://www.ato.gov.au/nonprofit/content.asp?doc=/content/00215720.htm>

The website includes links to resources and information including a PAF Model Trust Deed, the new PAF Guidelines, and information on the transitional arrangements.

Many thanks to our Technical Committee and all other Members who provided feedback and assistance with our submissions to Treasury. The result is that we have ensured bipartisan Government support for philanthropy. In particular we have ensured that the PPF/PAF, a critical private philanthropic foundation structure, has been supported, simplified, and improved.

Social inclusion: an agenda for citizen empowerment

Professor Peter Shergold is the Macquarie Group Foundation Professor at the Centre for Social Impact (CSI). CSI is a partnership between the Business Schools of the University of New South Wales, the University of Melbourne, Swinburne University of Technology and the University of Western Australia.



workers and high levels of welfare dependence (for instance) impose significant costs. Both workforce participation and workplace productivity are lowered.

The adverse impact is not just economic. People who feel politically disengaged fuel the growing lack of trust in the institutions of democratic governance. Those who are marginalised are less likely to subscribe to the values of civil respect, tolerance and orderliness which underpin legal authority and ethical conduct. Society fragments.

At one level Australia's 'excluded' are all too obvious. We can define the probabilities of being disadvantaged by income, race, ethnicity, age, disability or geographic location. Many of the overlapping symptoms of exclusion are apparent: inadequate education, unstable employment, poor health, unaffordable accommodation, risky lifestyle behaviours and higher rates of criminality and incarceration. Other characteristics are less evident but equally significant. The recent study of Sydney's social issues undertaken by Dr Debbie Haski-Leventhal for the Centre for Social Impact and United Way, *2009 Common Cause Report*, indicated the complex matrix of urban disadvantage. The 'excluded', she exhibited, are less likely to have access to the expanding world of social media (on the one hand) and less likely to volunteer their time to help others (on the other). Deprivation has many faces.

There is plenty of evidence on which to base policy. We can now define the incidence of social and economic disadvantage by postcode. We understand in a textured and granular way the diverse but related symptoms of poverty. Yet, in spite of good political intentions, it sometimes seems as if the creation of a socially inclusive society is as distant as ever. This much we know for certain: that the demands for the services of community based organisations, supported by philanthropic donation and social investment, are as great as ever. Today

At one level the quest for social inclusion seems the most straight-forward of public policy goals. Across the political spectrum virtually everyone espouses the need to provide equal opportunities for all Australians to meet their potential. It is widely accepted that barriers to social and economic advancement impose costs not just on those who lose out but on society as a whole. An inadequate supply of skilled

many 'charities' are finding themselves squeezed between falling income and rising need.

Something is profoundly wrong. We need to recognise what the nature of the problem is and, having done so, assess how it might be overcome – to imagine a possible future in which the role of governments, public services, non-profit organisations and philanthropists is transformed. It is a world in which social inclusion is achieved less by traditional forms of state intervention than by community empowerment and individual control.

"Something is profoundly wrong. We need... to imagine... a world in which social inclusion is achieved less by traditional forms of state intervention than by community empowerment and individual control."

A central problem with understanding the nature of social inclusion is the tendency to define it by reference to 'excluded' groups, the particularities of their disadvantaged condition and how the obstacles they face might be overcome. Most commonly the response to exclusion comes in the form of individual support payments (such as unemployment benefits, rent assistance or aged pensions) and programs (such as increased access to job training, social housing or home care).

There is nothing wrong with the fact that governments provide such transfer programs and services to those in need. However there is a great deal to fault with the manner in which those activities are undertaken.

Two aspects of implementation stand out. Firstly, that the governments who fund the programs, and the public services or non-profit organisations who deliver them, too often treat those they help as beneficiaries. Perceived as dependents, it is scarcely surprising that those who receive support see themselves as dependent. The very act of public provision reinforces the unequal relationship between government bureaucracy and welfare recipient, in which the individual learns helplessness and passivity. The system creates stigma and perpetuates isolation.

This is worsened by the fact that many public service agencies, importing language from the private sector, now treat those they serve as 'customers'. The explicit goal is worthy enough: to promote the importance of service quality. The unintended

consequence is to undermine the particular nature of government services – that they deliver rights and entitlements but, in consequence, carry responsibilities and obligations. The reciprocity of the relationship is fatally undermined. It is scarcely surprising that conditionality – such as the need to look for work, seek rented accommodation or care for one's children – is regarded by those in need as a form of penance or punishment.

Second, the complex plethora of financial support provided by the three tiers of Australian government – including payments, subsidies, concessions and rebates – often means that the individual is better off doing nothing (and keeping the benefits) than doing something (and seeing the benefits reduced). Effort goes unrewarded. The desire to return to education, access training or find a part-time job is often eroded if success brings little (if any) immediate financial reward.

In short, the dysfunctional framework within which governments deliver public support too often serves to reinforce the sense of social exclusion that it seeks to overcome. One need look no further than two generations of failure in Indigenous affairs to understand that the best of intentions can to often give rise to the worst of outcomes. 'Sit-down money' has undermined self-reliance and sapped the spirit of hope and enterprise. 'Self-determination', unmatched by adequately funded and governed community control, has trapped many Aboriginal and Torres Strait Islander people into providing themselves with second-rate services in third-world conditions. Despair and hopelessness stalk too many communities.

"The very act of public provision reinforces the unequal relationship between government bureaucracy and welfare recipient, in which the individual learns helplessness and passivity. The system creates stigma and perpetuates isolation."

Social inclusion, at its most fundamental level, will require the framework of political and civic engagement to be made over. The relationship between the state and its citizens, based on an implicit reciprocity between security and loyalty, needs to be reasserted. Individuals need to be actively engaged in the way in which governments provide them with support.

Citizens, given the opportunity to self-direct their own publicly-funded services, will be empowered to articulate their own destiny. Communities, given the chance to exert greater influence over their childcare facilities, schools, training providers, neighbour centres and public housing, will be able to govern their own institutions.

By enabling people to participate in the design of their own public support – by allowing them to become 'co-producers' of the services they need – an inclusive society can be built. Its fundamental premise is that individuals, acting separately or in concert, can be given the opportunity to be placed in control of their own future.

Already a possible future is starting to emerge. In Western Australia, for more than two decades, people with a disability (and their families and carers) have been given the opportunity

to decide on how best the State government can respond to their needs. Through a network of Local Area Coordinators the Disability Services Commission works with persons with a disability to organise their own budgets. The operating ethos, based on self-advocacy, is that people with disabilities are in the best position to determine their own needs and goals.

In Victoria the new vehicle for the training subsidy guarantee, Securing Jobs for Your Future, is firmly focussed on putting the user in control. Traditionally government has established fixed allocations for the training providers: in the future providers will be able to select their own preferences from the range of courses provided by TAFEs, private training providers and Adult Community Education organisations. The goal is to make the training system responsive to individual needs, rather than vice-versa.

Similarly, the Commonwealth's Department of Families, Housing, Community Services and Indigenous Affairs has piloted a place-based, community-owned approach to improving outcomes for young children. It's called the Communities for Children program. Its aim is to provide as much latitude as possible to a community, through volunteering organisations, to develop innovative interventions. Early results to engage hard-to-reach families in 45 disadvantaged locations suggest positive impacts, not least on the belief of parents that they felt more effective, were more involved in community service activities and had more positive perceptions of social cohesion.

At the same time, Centrelink is trialling a Personal Services Brokerage for Young Refugee Jobseekers initiative in Fairfield (Sydney) and Broadmeadows (Melbourne). At present too many of those who are seeking employment feel helpless. "I feel like I'm wandering alone and lost in the desert," reported one young refugee. "(I'm) trying to improve myself but no-one is listening." The goal of the program is to help participants tailor their own individualised pathway of interventions and then to take responsibility for achieving them.

The advantages of co-produced services are clear enough. Asking people what they want, and allowing them to make decisions on their own behalf, provides a far better diagnostic tool than the most sophisticated analyses of public servants or management consultants. More importantly, by engaging people in the creation of their own flexible solutions – and by acknowledging the real-world experience and skills they bring to the task – individuals become active participants in planning a better future.

Co-production is not a panacea. The design, implementation and management of individualised funding models can raise complex and contentious issues. The vision of collaborative governance involves risks that need to be prudently managed. Some individuals will be less interested or less able to organise their own affairs. Money might be misspent. The danger, however, is that an abundance of caution will lessen the resolve of governments and the public services who work to them. It is entirely appropriate that public funds, delivered through individuals or communities, be accounted for in a transparent manner. The reality, however, is that citizens who 'own' the services funded and delivered on their behalf are likely to make more effective use of their budgets than bureaucrats making the decisions on their behalf.

The challenge is no less for the community organisations who frame their diverse missions in terms of helping those who are 'excluded' and who advocate on their behalf.

An increasing number have become more financially dependent on governments. Those non-profits that work in the area of emergency services and welfare provision are particularly likely to be in receipt of grants (effectively subsidies for the delivery of activities) or contracts (payments for the delivery of government services).

The danger is that such organisations, constrained by the service agreements imposed upon them by public services, become part of the problem. Too often the well-meaning professionalism of social workers and case managers can undermine the potential of individuals, learning from each other, to frame their own answers. Too frequently the interventions of benefactors, philanthropists and social investors can unintentionally direct assistance to those specific initiatives which they wish to fund.

“The ambition both of public services and of community organisations should be to move from being funders and deliverers to becoming brokers, facilitators and coaches. They should seek to work not for, not with, but to the individuals that they support, helping the disadvantaged to make informed decisions on their own behalf.”

This does not need to be so. The Commonwealth's Personal Helpers and Mentors program seeks to direct professional support to help those suffering mental ill-health to make their own decisions. The program is premised on providing trusting, long-term relationships between mentors and those in need. The cornerstone is the empowerment that comes from assisting those who, in the words of a participant, suffer 'a cancer of the soul', to assist themselves.

The ambition both of public services and of community organisations should be to move from being funders and deliverers to becoming brokers, facilitators and coaches. They should seek to work not **for**, not **with**, but **to** the individuals that they support, helping the disadvantaged to make informed decisions on their own behalf.

The social capital created by individuals as they work with others to tailor programs and manage budgets to their own needs, builds community engagement. Co-production gives citizens greater authority to participate in the design and delivery of government policies and, by doing so, encourages participatory democracy. A civil society is revitalised. The citizen becomes the centre of attention.

That, surely, should lie at the heart of social inclusion. ■

www.csi.edu.au



Social entrepreneurship at the heart of social inclusion

The School for Social Entrepreneurs (SSE) was created on the basis that it is not enough to invest money alone in community initiatives.

Benny Callaghan, CEO of SSE Australia, explains that for community projects and social enterprises to be successful and genuinely sustainable, they require investment in the people that are building them, through upfront and ongoing personal and professional development.

Social inclusion is about ensuring all people feel valued and actively engaged in all aspects of society and community life. The current focus has arisen from a recognition that traditional approaches to serving those Australians most disenfranchised from society simply have not worked.

While the term social inclusion may be relatively new, the act of reaching out to excluded groups in our communities whether they are people with disabilities, new migrants or our youth is at the heart of what drives social entrepreneurs.

Social entrepreneurs identify resources where people only see problems. Rather than seeing communities as passive beneficiaries of services, they see them as the solution to the problems that they are experiencing. Social entrepreneurs begin with the assumption that communities understand better than anyone what needs to be done, and then go about finding ways to harness resources to bring those solutions to life.



The inaugural SSE cohort in Sydney with Alastair Wilson, centre back, CEO of the SSE in the UK.



The valuable role of social entrepreneurs in facilitating social inclusion from the grassroots has been well documented in the UK by the SSE. The SSE exists to provide training and opportunities to enable people to use their creative and entrepreneurial abilities more fully for social benefit. The UK SSE has been operating for over 10 years and now boasts over 450 graduates of its programs.

A recent monograph by the Chair of the SSE in the UK highlights the need to support social entrepreneurs to address entrenched disadvantage as well as the need for practical and accessible learning environments for these creative and committed individuals.

“Community development efforts will not be sustainable unless community members ‘learn’ how to tackle their own problems and use the contributions of others to help. The best forms of insight and capability come from ‘doing’ with learning support delivered as it is needed.”

Charlotte Young, Chair of SSE UK Sustainable Paths to Community Development, 2007.

When a group of Australians saw the powerful impact the SSE model was having in the UK, moves were made to bring the School to Australia. With the support of Perpetual, a feasibility study was conducted which concluded that not only was there a need in Australia for such a program, but also that there was fertile ground for its establishment.

The SSE Australia was launched in March 2009 with infrastructure support from the Westpac Foundation and the Vincent Fairfax Family Foundation. Two programs are currently underway in Sydney with 32 diverse and inspiring students pursuing community projects and social enterprises that are creating a more socially inclusive Australia. Plans are underway to launch a Melbourne School in March 2010.

The SSE pathway to social inclusion

The SSE model is socially inclusive in two ways. Firstly, SSE's action learning methodology directly addresses the needs of social entrepreneurs in the way that they learn. This means that the program is accessible to people regardless of

academic background, literacy levels or financial position. SSE explicitly seeks to make its program accessible to individuals and communities that most need this kind of learning program.

Secondly, the community projects and social enterprises that are pursued and created by SSE students target areas that promote greater social inclusion such as job creation and healthier lifestyles in disadvantaged communities.

Alicia Martin, Dreams Within Food Busters

Alicia's mission is to transform healthy food from being a luxury item to a necessity. Alicia developed her social enterprise to support families like her own, who struggle to afford healthy food. She also wants to help others eliminate additives and preservatives in their food which she has seen affecting her son who has a learning difficulty. Dreams Within Food Busters began with Alicia developing relationships with local wholesalers to offer affordable fresh food hampers. She has grown the business to provide back-to-basics cooking classes, a weight loss program and monthly goal setting meetings which include simple finance and saving tips.

Michael Maxwell, Mt Druitt Community Enterprise Hub

Mt Druitt (NSW) is one of the most deprived urban areas in Australia. Michael is committed to supporting community-based solutions that address this entrenched cycle of social and economic disadvantage. He has established a Community Enterprise Hub which features a food market, mobile café, op-shop, and bi-weekly community markets. The Hub creates a vibrant meeting place where community members can access affordable food and clothing as well as a series of new training, work experience and full-time employment opportunities for local residents.

SSE was created on the basis that it is not enough to invest money alone in community initiatives. For community projects and social enterprises to be successful and genuinely sustainable, they require investment in the people that are building them, through upfront and ongoing personal and professional development. ■

For more information on how you can become involved with the SSE, please contact Benny Callaghan at benny@sse.org.au and visit www.sse.org.au



SSE student Michael Maxwell at the community markets, held at the Mt Druitt Social Enterprise Hub, which he established alongside a foodmarket and mobile café to create a vibrant meeting place where community members can access affordable food and clothing as well as employment opportunities.



Preventing homelessness

Janet Hirst, CEO of The Ian Potter Foundation, knows that prevention and early intervention are at the heart of the solution to homelessness, and a central part of the social inclusion agenda.

The measure of our success at The Ian Potter Foundation is the impact and effectiveness of our grants. Increasingly, achieving a quality impact requires a strategic and planned approach to grantmaking, and identifying the key issues – those areas where we can help most – is a vital element of this.

Homelessness is a complex issue that we believe is a key indicator of the health of our society: quite simply, in a country such as ours no-one should be homeless. This is an issue that must be a central part of the social inclusion agenda and efforts to build a healthy and fair society. In the past, the Foundation has made a number of grants to organisations that address homelessness, but had not identified homelessness as a particular priority for funding.

The federal government's White Paper, *The Road Home: A National Approach to Reducing Homelessness*, states that on any given night around 105,000 people in Australia are homeless. According to Homelessness Australia, the largest single cause of homelessness in Australia is domestic and family violence, with 22 per cent of all people, 55 per cent of women with children, and 37 per cent of young single women who seek help from homelessness services doing so to escape violence.

The literature on women's homelessness emphasises the long term impact of sexual violence against women, and its close association to the incidence of substance abuse and mental health issues that trigger the female trajectory into homelessness. Young men and women cite family breakdown as the cause of their homelessness; couples with children are often homeless because of poverty and eviction; many men in the homelessness system are there because of mental or physical illness, substance abuse and financial difficulty (Homelessness Australia fact sheet).

According to the Australian Institute of Health and Welfare's paper *Counting the Homeless 2006*, (June 2009),

"Reducing the size of the homeless population will require a significant investment in early intervention and applying appropriate intervention models to sub groups in the population." Homelessness Australia reiterates that an

understanding of the issues that are at work before homelessness hits needs to be developed, and that prevention and early intervention care programs need to be provided.

As part of the Foundation's ongoing planning process, we recently completed a comprehensive review of our Community Wellbeing program area, consistently our largest and busiest funding program, and decided to make prevention of homelessness a focus for the next two years. This program area has been allocated the largest proportion of our annual budget for grants, and within it grants of \$50,000 and over will now target preventing homelessness specifically.

The stated purpose of these grants is to "improve the life chances of individuals and families by supporting organisations and programs that address issues of drug dependence, family violence, mental health and other problems related to homelessness." For these grants the Foundation has introduced a new two stage Expression of Interest application process.

Keeping in mind the principles which underlie the Foundation's grantmaking, particularly its focus on prevention and long-term thinking, the question we had to answer next was how could we ensure that the Foundation's grants have most impact?

Homelessness Australia confirmed the answer in their recommendation that prevention and early intervention are at the heart of the solution to this complex and difficult problem. The Foundation will concentrate on funding



early interventions and will focus on services that address the causes of homelessness in the hope that, at least for some people, these programs will break the cycle. The Foundation will therefore consider applications for programs that deal with the impact on families of domestic violence, family breakdown, mental illness and substance abuse; for programs that work with families, women, children and young people who are at risk of homelessness; for programs that help young people who are homeless or at risk of becoming homeless to stay in education or employment; and for programs that work with young people who are recently homeless to provide them with secure accommodation and support.

The Foundation is optimistic that through the new Expression of Interest format we will identify some innovative, solutions-oriented programs and help the people working at the front-line of homelessness to put in place initiatives that will make a lasting difference. For The Ian Potter Foundation, this is philanthropy's great opportunity – giving the means to the people who are best placed to bring about genuine change on issues as fundamental as a socially inclusive society. ■

Please visit www.ianpotter.org.au/communitywellbeing for further information.



Patricia Faulkner

Patricia Faulkner heads the Australian Social Inclusion Board, which is the main advisory body to the Australian Government on ways to achieve better outcomes for the most disadvantaged in our community. The Board, a collection of individuals, is about generating ideas and innovation, rather than representing specific groups of disadvantaged people. Patricia currently leads KPMG's National Healthcare practice and chairs the boards of the Peter Mac Cancer Centre and Jesuit Social Services. Her previous role as Secretary of the Department of Human Services in Victoria, and her broad experience on not-for-profit boards, provides her with an impressively deep understanding across a range of social issues and efforts to mitigate them. *Australian Philanthropy*'s editor Louise Arkles spoke with Patricia about what 'social inclusion' means to her.

Throughout the last century there have always been people and agencies in Australian society endeavouring to address poverty and disadvantage. Is the term 'social inclusion' just the latest buzzword?

Social inclusion describes the evolution of thinking that has occurred around why people don't get to participate in the full life of our community. Each time we grow in our understanding we re-label the concept. Traditionally it's been about poverty – people were disadvantaged because they didn't have money; of course poverty is still a key issue, but you can be poor and included, or wealthy and excluded. So we now recognise that there are other dimensions to the concept.

Re-labelling it means that you make the distinction and use a different set of policy instruments and responses because it's no longer just about poverty. It's about trying to build community and connections, and people having a voice, in addition to poverty. So it's unfair to call it a buzzword, it's about reflecting a new understanding of why people become excluded and what we can do about it.

That said, we're having a bit of trouble with the term social inclusion as it isn't something people immediately recognise, like the words poverty or disadvantage, so it is a difficult concept to get across.

How important is it that the general population understand the concept of social inclusion, as most Australians already relate to the issues of poverty and disadvantage?

Very important, because it's about us uniting behind efforts to address problems we face as a society. I often talk to people about social inclusion and about the fact that during the long period of economic growth in Australia, some people remained outside that economic growth; remained long-term unemployed, or poor, or ill-educated, not connected to the internet.

I think that the general population sometimes feel that when things are going well everyone is benefiting, and don't quite

understand the concept of exclusion. If they do think about the excluded they sometimes think that it is their own fault; they're not trying hard enough or working hard enough.

Social inclusion needs to be well understood to generate personal support as well as political support to do something about it. We need individuals to ensure they are not excluding others. The book *The Spirit Level: Why More Equal Societies Almost Always Do Better*¹ talks about the fact that the more equal a society the more successful it is in every dimension. So even if a person doesn't feel personal empathy, they can at least understand at the aggregate level that to have some people excluded holds back the entire society.

What strategies has the Board identified to foster social inclusion?

One of the strategies is to measure – what gets measured people attend to. The first step was to produce the *Compendium of Social Inclusion Indicators*² and open it up to public debate. We are asking 'are these the right measures?', because if we're not measuring the right things then it's hard to get people united behind action.

Think about economics – you can hear daily in the media that various economic indicators are going up or down, and people are pretty literate, monitoring the trends and knowing when to be concerned. The global financial crisis is a case in point; everyone understood that things were bad and they stood behind the government in taking extreme action. We don't have that same literacy about social issues, and often we're shocked when we hear some measure of social inequality (e.g. the 17 year life expectancy gap for Indigenous people, or the similar gap for people with disabilities). We're shocked when disadvantage plays out in bad behaviour, such as the Cronulla riots.

The second part of the strategy is to try to understand why the statistics have turned out this way. What is the pathway that some people took that led them to become socially excluded? And what is the pathway that others took, from a similar starting point, that led them to more positive outcomes? This understanding will help guide government on the responses they might make.

Human nature is such that there will always be people who will get ahead, who are more motivated or faster learners. Is it simply a matter of levelling the playing field?

Levelling the playing field is not enough, as some disadvantaged people can't play on the playing field, even if it is level.

If you have a disability or if you are a new parent who did not experience good parenting yourself as a child growing up in a dysfunctional family, or if no-one in your family has been employed for two generations – then the level playing field isn't enough. People living with entrenched disadvantage need others to reach out and accommodate their particular needs: often extra support is required just to bring people in to access existing services.

What will it take to achieve the dismantling of the silos which frame the traditional view of disadvantage – poverty, homelessness, unemployment?

In his recent Sambell Oration at the Brotherhood of St Laurence³, the Prime Minister said this is the most challenging question, how to persuade people to move out of their silos. One way is to encourage place-based initiatives; this means that instead of directing the various service providers – child protection agencies, employment services, mental health services, etc. – to deliver the same services across many locations, you look at it from the other side and ask what does this particular place need, how should services here be organised?

There have been some good experiments in Victoria, e.g. Neighbourhood Renewal, which starts with a group of people in a place and lets them define what it is they need and then government can respond to those identified needs. This has the advantage of allowing individuals and communities to become empowered to take responsibility for their own wellbeing.

Tony Vinson's work in *Dropping off the Edge*⁴ shows that some locations need a lot more help, that disadvantage is heavily location specific. So an intensive look from the bottom up is one of the ways that government and community organisations can identify the problems, and also the strengths, of particular places and communities.

Is it more a mind-shift than changing resource allocation that is required?

It's both. Uniting behind social inclusion as a concept requires people to think about the role of government: is it to do what is better for the community as a whole by dedicating more resources to solve some problems or is it about everyone getting their fair share?

Everyone needs to work together. We need to take a holistic approach, so that people who are suffering multiple disadvantages are not left to face this alone. Strategies like co-locating services, or using a case management approach, can be very worthwhile.



What does success look like?

For the Board, success is influencing government thinking. To this end we provided advice in the development of the *Australian Public Service Social Inclusion Policy Design and Delivery Toolkit*⁵ which explains how to incorporate the social inclusion agenda when thinking about all policy areas. For example, in designing the Jobs Fund, government was prepared to look at weighted distribution of funding to locations of greatest need. This is a bright signal for the future that, instead of spreading assistance widely and thinly, government is prepared to provide deep and focused support in areas of greatest disadvantage.

Another recent example is a wonderful report from the Attorney-General, the Hon. Robert McClelland MP, called *A Strategic Framework for Access to Justice in the Federal Civil Justice System*⁶ which is a working example of social inclusion in action. This report demonstrates government thinking about its work, in this case about access to justice, from the point of view of disadvantaged people as well as from the mainstream view. In practice this means delivering social inclusion outcomes alongside core business outcomes without using additional resources. ■

Australian Social Inclusion Board website
<http://www.socialinclusion.gov.au/AusGov/Board/Pages/default.aspx>

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By Richard Wilkinson and Kate Pickett, Allen Lane, March 2009.
2. *A Compendium of Social Inclusion Indicators: How's Australia faring?*
2009 by the Australian Social Inclusion Board <http://www.socialinclusion.gov.au/AusGov/Board/Pages/default.aspx>
3. <http://www.bsl.org.au/main.asp?PageId=7510>
4. *Dropping off the Edge: The Distribution Of Disadvantage In Australia 2007*
by Tony Vinson see <http://www.australiandisadvantage.org.au/> for more information.
5. *Australian Public Service Social Inclusion Policy Design and Delivery Toolkit 2009* <http://www.socialinclusion.gov.au/Pages/Resources.aspx>
6. *A Strategic Framework for Access to Justice in the Federal Civil Justice System 2009* by the Access to Justice Taskforce http://www.ag.gov.au/www/agd/agd.nsf/Page/Publications_AStrategicFrameworkforAccessstoJusticeintheFederalCivilJusticeSystem

Discrimination is an issue for everyone

The Reichstein Foundation is committed to the elimination of discrimination and oppression based on gender, race, class, sexual orientation, disability or age. **Christa Momot**, Executive Officer at the Foundation, explains how their funding supports the premise that social inclusion is everybody's business.

With our emphasis on social change philanthropy, focusing on the root causes of social, economic and environmental injustices, social inclusion is a central tenet. As such, the Foundation strives to include the people who are impacted by those injustices as decision-makers.

A major social inclusion project we have funded is *WayOut, Rural Victorian Youth & Sexual Diversity* project which began in 2002 as a suicide prevention project targeting gay, lesbian, bisexual and transgender (GLBT) young people living in rural areas. Also supported by The Myer Foundation (G4 Committee) and the Albert Van Moorst Memorial Trust, WayOut is achieving practical outcomes for this group of marginalised youth.

The project's aim is to redress the isolation, stigma and discrimination that same-sex attracted (SSA) young people may face at school, at work, at home and/or in rural communities generally. One of the key beliefs underpinning the project is that 'the problems experienced by SSA young people originate in the stigma, isolation and discrimination that comes from the society around them.'

From its commencement, the project team was committed to youth participation in the design and delivery of services. Following consultations with SSA young people in Macedon Ranges Shire, the first local working committee of young people was established. Amongst other things, the group members stated that they didn't want to have a group exclusively for SSAYP – rather they wished to involve their 'straight' (i.e. heterosexual) friends. Consequently membership was open to all young people who shared the project's aim.

Some time later the project was approached by young people in Castlemaine, who had seen the work of the Macedon Ranges group, and they then formed the Mt Alexander

Shire WayOut Committee which also welcomed all young people.

When the project began it was not aware of any groups that used the model of welcoming all young people and it proved to have a number of strengths:

- It did not require that a young person makes a decision about their sexuality or 'come out' as being same sex attracted or heterosexual.
- It enabled a greater 'critical mass' of young people to gather who shared similar views, concerns and interests (where these may not commonly occur in the broader environment).
- It acknowledged that addressing homophobic discrimination is an important cause for all people in the community.

While such projects provide much needed visible successes, severely under-resourced workers at the coalface continue to deal with the daily realities of homophobic beliefs and attitudes that persist in our community, despite some of the gains at a criminal/human rights legal level.

These include providing comfort to a young gay boy who has recently had his hair set alight at school by other students, to pursuing a complaint of discrimination under state equal opportunity legislation.

In the latter matter, WayOut had received funding from the Reichstein Foundation to conduct a residential weekend forum for 60 young people and workers from across rural Victoria. The project applied to what it believed was an 'ordinary/mainstream' camping facility outside of Melbourne to hold the event but its application was refused because of the sexuality of proposed participants. The refusal was based on the religious beliefs of the organisation operating the facility.

Obviously we have a considerable way to go to achieve social inclusion in Australia. ■

Over the past 20 years there have been significant shifts at the formal level in recognising equal rights for gay, lesbian, bisexual and transgender (GLBT) young people. In 1973, The American Psychiatric Association declassified homosexuality as a mental illness; in 1980, homosexuality was decriminalized in Victoria and since 2000, it has been unlawful to discriminate against people on the basis of their sexual orientation and gender identity under Victorian Equal Opportunity legislation. However, in a society where heterosexuality remains the dominant norm, life for many GLBT young people is less than easy.

It is generally estimated that 8 to 11 per cent of young people are attracted to others of the same sex. Studies have shown that despite the many advances at formal and community based levels to promote welcoming and inclusive communities, GLBT young people are a highly vulnerable and at risk group. Research documents that GLBT young people are more likely than young people generally to experience family conflict, encounter difficulties at school, experience abuse (at school, work or in public places), become homeless, and report high rates of drug and alcohol abuse. Various Australian and overseas studies estimate that the rate of attempted suicide amongst these young people is between 3 to 14 times higher than their heterosexual counterparts.



Ganbina: empowering Indigenous youth

Rebekah Lautman, Programs Manager at The R. E. Ross Trust, explains how actively engaging with disadvantaged Indigenous Australians around their education and employment has improved their social inclusion.

The R. E. Ross Trust granting framework is underpinned by a recognition of the social and economic determinants – such as financial and material disadvantage, access to adequate housing, social support, food, security, transport, and employment – that can contribute to disadvantage, inequity and lead to social exclusion in the community.

In particular the loss and/or lack of employment opportunities can begin a vicious cycle of exclusion from mainstream society which can lead to long term financial disadvantage, poverty and an inability to participate in mainstream social networks and activities. For many Indigenous communities across Australia, the effects of long term unemployment and reduced educational opportunities have contributed to high levels of social exclusion.

According to Ganbina, formerly the Koori Economic Employment and Training Agency (KEETA), the unemployment rate for the Aboriginal community in Shepparton and the Goulburn Valley in Victoria is in excess of 78 per cent and most of the Aboriginal employment is not within the mainstream.

It is against this background that the trustees of the Ross Trust made the decision to develop a collaboration with Ganbina, an organisation devoted to supporting and empowering Indigenous youth in Shepparton and the Goulburn Valley, to gain employment in their career of choice. Ganbina and the Ross Trust began their major collaboration in May 2004 with a three year grant, which was renewed in 2007 for an additional three years. The Ross Trust's investment, along with other philanthropic partners, has built the organisation's capacity to deliver programs that have a preventative and long term focus on enabling Indigenous youth to gain economic independence through employment.

The core philosophy of the 'Jobs 4 U 2' program is to support Indigenous youth to realise their full career potential and make a positive contribution to local business and industry. The partnership between Ganbina, local business and local secondary schools is unique in that it provides a seamless transition for Indigenous youth from education to training to employment. The success of the model lies in Ganbina's long term strategy of working with youth to define their career direction from an early age and then supporting them through key life transitions.

Its primary activities address:

- low retention rates of Indigenous students;
- low participation rates of Indigenous students in school-industry based programs; and
- lack of access to localised employment by Indigenous youth.

Ganbina is currently working with all six of the secondary schools in the Shepparton and Mooroopna area, and the principals recognise the value of the model.

In recognition of the need for even earlier intervention, Ganbina has been developing relationships with Indigenous primary



*Kirra Harrison and Minjarra Atkinson at Ganbina 2008 Awards.
Photo courtesy of Ganbina.*

school students and their parents through the creation of scholarships for children below Year 7. This direction was developed in response to the lack of transition from primary to secondary school for some Indigenous students.

Within the Goulburn Valley, there is an unprecedented demand for Ganbina's services; in 2008/09 a total of 264 individuals registered, with 246 (93 per cent) remaining engaged and accessing 315 program related activities as of June 2009. This is a significant achievement particularly given that the majority of activities are conducted outside of education, training or employment hours.

The impact of the project is being felt far and wide. VicHealth chose Jobs 4 U 2 program from its pool of more than 900 projects to win the 2008 VicHealth award for excellence in health promotion and in 2009, the Ganbina philosophy and model was presented to Alberta Education in Canada as a best practice model for engaging and retaining Indigenous students. Closer to home, there are now greater numbers of Indigenous students undertaking Year 12 studies in the Shepparton area and a demonstrated increase in the numbers of Indigenous youth being involved in employment including part-time after school jobs.

The onset of this cultural change has greater numbers of Indigenous young people aspiring for a future where their community is able to participate and share equitably in the wealth of the region. The Ross Trust hopes that in the near future, there will be a whole-of-government approach, including appropriate funding streams, which embrace such models of actively engaging with disadvantaged people to encourage and enable their social inclusion. ■

<http://www.ganbina.com.au/>
<http://www.rosstrust.org.au/>



Finding 'the best how'

Against the backdrop of the Clinton Global Initiative's fifth annual meeting in New York in September 2009, Bill Clinton reflected on the different experience of working in the not-for-profit world compared to government. He noted how in government his focus was on what was to be done and how much it was going to cost, whereas in his new role he was focusing much more on how he was going to do it, in other words 'what is the best how'. **Tim Marchant**, Senior Research and Projects Officer with Mission Australia, takes up the question of how we go from good intentions to meaningful change in the social inclusion arena.

Australia is a country of notable prosperity, even allowing for the Global Financial Crisis (GFC). In recent years, Australia has enjoyed significant growth, with rates above the OECD average¹. We have thus far survived the GFC in better shape than most other developed nations (World Economic Forum, 2009)². However Ken Henry, Secretary to the Treasury, recently noted that GDP is a poor indicator of wellbeing³.

The statistics hide another reality, one in which a number of individuals are marginal to the broader success that the nation can claim. Recent research, namely *Closing the Gap on Indigenous Disadvantage; Dropping Off the Edge: The Distribution of Disadvantage in Australia; Towards New Indicators of Disadvantage, Deprivation and Social Exclusion in Australia; and Understanding the Drivers of Poverty Dynamics in Australian Households*,⁴ provides information about these Australians, the various aspects of social exclusion they experience, and the sites where exclusion clusters.

What does it mean to be included?

In the Australian context social inclusion is seen as being able to play a full role in Australian life in economic, social, psychological and political terms. In practical terms this is defined as all Australians having the resources, opportunities and capabilities to:

- learn by participating in education and training;
- work by participating in employment, in voluntary work and in family and caring;
- engage by connecting with people and using their local community's resources; and
- have a voice so that they can influence decisions that affect them (<http://www.socialinclusion.gov.au>, accessed 13 October 2009).

The advantages and disadvantages of this approach are set out clearly in *Social Inclusion, Origins, Concepts and Key Themes*⁵, and the multi and interconnected dimensions of social inclusion resonate well with Mission Australia's experience. We know, for example, that solving homelessness requires more than providing a bed and a meal. People coming into specialist homeless services often need assistance in a number of areas, alongside housing. Social inclusion recognises the need to work in many areas simultaneously. Social inclusion is everyone's business.

What is 'the best how'?

So how do we facilitate the move from exclusion to inclusion?

Of course, there is no simple answer but informed by experience on the ground we have some ideas. At its heart social inclusion, given its multi and interconnected dimensions, is about relationships at individual, organisational and system levels.

"Key to finding 'the best how' is locating practical strategies that animate these relationships."

At an **individual level** social inclusion is premised on a set of values which begin with accepting the inherent worth and value of each person and treating people with respect and dignity. In practice this means:

- ensuring that those requiring assistance are at the centre of decision making and planning process and actively participating;
- tailoring respectful interventions to the needs and strengths of each individual/family/community;
- utilising a strengths-based approach in overcoming adversity and supporting a person/family/community to achieve their goals;
- using holistic assessment and planning; and
- acknowledging and being sensitive and responsive to cultural needs.

At an **organisational level**, it is about creating a dense network of services and supports grounded in local communities, i.e. an ecology of support. It rests on the understanding that social inclusion cannot be achieved by any one agency or intervention. The 'best how' is about working together.

As an example, Catalyst-Clemente, an innovative socially supported university education program run in a community setting, is a complex primary network of relationships between:

- the students;
- the university institution (historically ACU);
- community service providers (historically St Vincent De Paul and Mission Australia); and
- the community members who are the learning partners to the student.



This primary network widens to include the supports and services that each of the partners is part of, and so it ripples outwards. No single part of the network by itself would be able to deliver social inclusion outcomes. The first ever Catalyst-Clemente Australia Forum, held earlier this year bringing together many of the different partners, was indicative of the richness of these relationships and the potential they hold.

At a **systems level** social inclusion is about ensuring that policies and initiatives are coordinated across national, state and local government. A number of the key Council of Australian Governments (COAG) working groups, are attempting to break down silos to ensure, for example, that there is synergy between agendas to support people into work and reducing homelessness, or between child protection and family homelessness.

Systems level social inclusion also requires a key role for non-government organisations including business, not-for-profits, philanthropy and educational bodies. It is about valuing everyone's participation in advocacy, shaping policies and creating and supporting initiatives. The National Compact for the Third Sector may have a facilitating role here.

Exemplars

There are a number of programs Mission Australia runs or is part of which are working toward social inclusion via collaboration and partnership. Evidence indicates they are playing an important catalytic role:

- Catalyst-Clemente, described above;
- Pathways to Prevention (working with children and families in Inala, Queensland);
- the Michael Project (working with homeless men in Sydney, NSW);
- UREEP, a social enterprise (Melbourne, Victoria); and the
- Milk Crate Theatre (Sydney, NSW), a participatory arts program.

Philanthropy, Social Inclusion and Innovation

Philanthropic funding has been central to all of the innovative exemplars noted above, providing the opportunity to think outside of single dimensional funding streams and helping to generate new ways of thinking about contemporary social issues.

However philanthropy, particularly in the last couple of years, has done more than provide funding. Driven by personal motivation, the donor of the Michael Project, for example, drew on research, policy and practice to consider 'the best how'. This project is a significant initiative which aims to foster the social inclusion of homeless men in metropolitan Sydney, and builds on outcomes from a place based integration innovation (Mission Australia Centre).

Private funding such as this has provided an opportunity to try new approaches with rigorous and robust research. Most importantly, engaged philanthropic funding has brought new resources, networks and skills, including the ability to critique innovation with a new lens, and a partner in advocating for systems level change.

Key future contributions can be made through:

- upfront investment in research and development to ensure adequate conceptualisation about potential projects/interventions;
- support for network building and establishing collaborations to drive and maintain projects;
- ensuring that once up, projects are able to run for an adequate period of time; and
- supporting evaluation, scaling up and rolling out where appropriate.

Leveraging systemic change

Practically, a project may work with a small number of people in a particular area, but if it is properly conceptualised in terms of existing evidence, appropriately bedded down in terms of collaborations and partnerships, and rigorously and robustly evaluated, then this work can and should be leveraged to inform and influence public policy. It will have a practical life far beyond its immediate purpose and will also be a good return on investment.

We all need to care about social inclusion. It is not a fad. It offers new ways of working and new emphases. Philanthropy is part of the 'everyone' and can play a key role in supporting, defining and refining a social inclusion agenda. You can join us to find 'the best how' by reaching out to those most excluded and insisting on good conceptualisation of projects which will help to leverage what is being done into systemic change. ■

www.missionaustralia.com.au

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Mental illness and social exclusion

There are a number of common elements for social exclusion, including limited education; unemployment; homelessness; mental and physical ill health; and a criminal record. Where any one of these are found, mental illness is sometimes a factor – and where they converge, mental illness is often at the centre of the problem. Colonial Foundation committed a 10 year major grant to establish a research centre into mental illness, and as **Andrew Brookes**, Colonial Foundation Executive Officer explains, Orygen Youth Health Research Centre has already made a substantial impact in youth mental health across Australia.



In 2001, Colonial Foundation set about finding an area of community need where sufficient resources were not being allocated, where

our funding could fill a gap and vitally make a difference. The research work kept pointing to mental health as being a seriously underfunded area of need, one which would have an increasing impact upon our society if it were not addressed.

As the physical health and material well-being of young people in developed countries has progressively improved during the second half of the 20th century, there has been a steady and alarming decline in their mental health. The period between 12 and 26 years has always been the phase of life during which severe psychiatric disorder is at its peak but there was solid evidence that the prevalence and complexity of disorders had increased. Mental disorders were more common than ever before, reaching a rate of more than one in four among 18 to 24 year olds in the 1998 *Australian National Survey of Mental Health and Well-Being*.

The more dramatic manifestations of the rise in mental health issues such as suicide, death from drug overdose and youth violence were being featured daily in the media. Less featured were the erosive effects on the prospects, quality of life and families of these young people, especially those who develop illnesses such as schizophrenia, bipolar disorder and severe depression.

Unemployment

Mental illnesses are a major cause of social exclusion. Being unemployed is another significant risk factor, even in the absence of mental illness. People with mental illness are more likely to be unemployed than the general population more so than any other disability group. In addition they are the disability group least likely to be assisted by employment services.

Over one quarter of the recipients of disability support pensions are people with a psychiatric disability. In those aged under 45, psychiatric illness constitutes the largest disability group accessing a disability pension. The same report noted that the two most common exit paths for people on this pension are death or old age pensions.

Research shows that those with psychotic illness are the least likely to be working. At the outset of psychotic illness, unemployment rates are in the order of 40-50 per cent. In non-psychotic illnesses, such as depression, the unemployment rate early in the course of illness is less than in psychosis, being estimated to be about 20 per cent.

Education

Employment rates are directly related to educational achievement. This is seen in the chart below from the US Department of Labor.

People with mental illness have lower educational achievement level than the general population.

In a study conducted at Orygen Youth Health Research Centre, over half (mean age 22) of the participants who had a mental illness had left school with a Year 10 or less education.

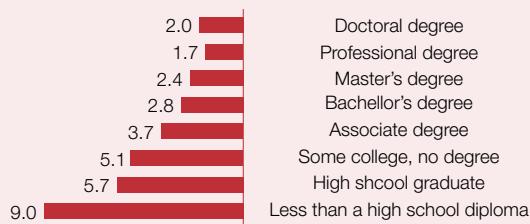
Homelessness

Another group which suffers social exclusion is the homeless. It is well known that a significant proportion of homeless people experience mental illness. While experience of homelessness may lead to the onset of mental illness, it is more common for mental illness to lead to homelessness.

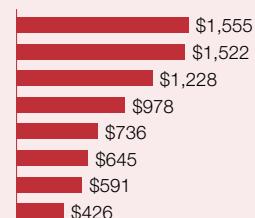
A particular point of vulnerability for sufferers of mental illness is discharge from inpatient units. Research shows that for those discharged from mental health inpatient units back into the community (i.e. under the care

Education pays

Unemployment rate in 2008



Median weekly earnings in 2008



Source: Bureau of Labor Statistics, Current Population Survey



of GPs), there is little follow-up from a community mental health team, discharge is often to unstable accommodation, and sometimes, either through necessity or deliberately, it is to another region so the original treating services are under no obligation to follow the individual.

Health

Good health is recognised as an important component of social inclusion. Compared to the general population there is twice the rate of death than from cancer and twice the rate of death than from heart disease among those with mental illness, but only 31 per cent of the interventions are given which may have prevented these.

Crime

Largely due to issues relating to substance use, people with mental illness are more likely to have a criminal conviction than the general community. The rate of incarceration of people with mental illness has increased in the period since dismantling of mental health institutions, suggesting that prison is essentially serving as an alternate destination for those who do not receive a thorough and early intervention for their illness.

Philanthropy partnering with experts

It was the major impact mental illness has in the community which drew Colonial Foundation to the issue. When the Foundation was conducting its research, it was obvious that governments were well aware of the serious problems posed by youth mental health disorders, but their response seemed to be piecemeal and ineffective. A vital missing ingredient was a cohesive and practical research strategy that focused on young adults as well as adolescents. Identifying an organisation that could work to raise awareness of mental illnesses and develop programs and treatments for early detection and intervention was the next challenge.

Colonial Foundation consulted with experts and determined that what was required combination of building on an existing youth mental health research centre, and the creation of a new organisation. The Foundation was directed towards the work of a small youth mental health research centre called EPPIC in Parkville, Victoria, under the direction of Professor Pat McGorry. Pat's team of around 30 researchers

had been conducting groundbreaking research in the area of youth mental health and needed to be helped to take the research program to scale.

Colonial Foundation was greatly attracted to the clinical research nature of the project, as were The University of Melbourne and Melbourne Health. A new research organisation – Orygen Youth Health Research Centre – was proposed by the three organisations and a strategic plan developed. The Foundation determined to provide a 10 year commitment to Orygen with funding in the order of \$2.5 million per year for the first five years and, subject to a satisfactory review at year four, funding would continue at an appropriate level for the second five years.

Orygen Youth Health Research Centre was established as a Company Limited by Guarantee, with Colonial Foundation nominating three Directors and Melbourne Health and The University of Melbourne one Director each. The Executive Director of the Research Centre was also on the Board. This structure enabled Colonial Foundation to be closely involved in Orygen and for the grantmaking organisation to be kept fully informed about its major 'investment'. The grant, or contribution, agreement drawn-up between the parties ensures that the Foundation funding is dependent upon satisfactory reporting (twice yearly) and also subject to occasional external reviews.

Colonial Foundation's funding began in early 2002 and Orygen was quick to build its operations. Staff numbers quickly built from around 35 to about 140 today, including leading researchers attracted from interstate and overseas.

The fourth year of Colonial Foundation's commitment to Orygen occurred in 2006 and, to confirm the continuance of funding for the full 10 year period,

an expert review panel was assembled. This review strongly supported Orygen's work and, whilst suggesting some improvements to practise at the Centre, recommended to Colonial Foundation that its funding indeed continue for the full ten year period and that the funding be increased to \$17 million for the next five years. The risks of providing such a large grant and the allocation of such a large proportion to one organisation certainly seem to have paid off.

The Research Centre is conducting a diverse range of major research studies focussed on improving treatments for young people with mental disorders and substance abuse disorders. Orygen has attained two National Health and Medical Research Council Program Grants for research into emerging mental disorders and its researchers have published over 800 scientific papers. Orygen has successfully encouraged service reform, and is the lead operator of Headspace: the National Youth Mental Health Foundation, supported by a \$69 million grant from the Australian government. There are now 30 Headspace centres funded to provide youth mental health and drug and alcohol services across Australia.

Australia is now a world leader in Early Intervention and Youth Mental Health. Within Victoria and around the world we are achieving much better long term quality of life for those affected by mental illness. ■

<http://www.colonialfoundation.org.au/>
<http://www.orygen.org.au/>

Colonial Foundation Trust



Supporting the development of community sport

Sport can be integral to the life and health of a community, particularly in regional and rural Australia. **Rod Philpot**, General Manager of the Australian Sports Foundation (ASF), explains that while not charitable at law, through the ASF there is much scope for sports projects to address social needs through participation.



After the dust settles on the sports funding allocations that occur at federal and state budget time, and the economic stimulus plans for developing sporting facilities, it is community club-based sport that is left contemplating its future.

Sport is often regarded as the lifeblood of communities, particularly in regional and rural areas. Community sport programs have been developed by locals to meet local needs, however it is also the case that communities are struggling to retain volunteers in sport and source funding for developments that will create further opportunities for participation in sport.

The Australian Sports Foundation is a public company initiated by the government in 1986 specifically to support the development of sport in Australia. It is listed in the Income Tax Assessment Act 1997 as a deductible gift recipient (DGR), and any non-profit incorporated sporting organisation, community group, council, or school can apply to register a sport related project with the ASF.

While sport is not a charitable purpose at law, it nevertheless fulfils a significant number of beneficial community roles ranging from social cohesiveness, inclusiveness, active participation and hence health benefits, employment, leadership and positive involvement of youth.

In its submission to the Commonwealth Government's Independent Review of Sport in October 2008, the Australian Sports Commission stated that "Australia has a long history of engendering an active sporting lifestyle, leading to international success in sport. However our active lifestyle is under threat and the sport system which has evolved over our history is struggling to adapt to and compete with modern challenges and inactive leisure pursuits." The starting point for addressing these challenges is community sport.

The ASF is the only organisation listed in taxation law that has the ability to support sport development at all levels throughout Australia. Projects are able to be registered with the ASF in five discrete categories:

- facility development;
- equipment;
- sport development;
- team travel; and
- hosting a major sporting event.



Community members working to resurface the courts at the Healesville Tennis Club. Healesville was on the fringe of the February 2009 bushfires in Victoria and the Tennis Club played a role in arranging fundraising activities in the region to assist victims.

A focus of the ASF is to support initiatives in regional and rural Australia. Over 20 per cent of current projects are based in regional or rural areas, as are approximately 40 per cent of enquiries received. This is regarded as significant considering that regional/rural Australia account for approximately 13 per cent of the national population.

The sports sector is reported to have held up well in the financial crisis, and the ASF is evidence of this with over 550 projects registered Australia wide and discretionary grants issued in 2008/09 amounting to \$16.7 million (a growth of over 20 per cent on 2007/08). Communities have benefited, for example, through projects designed to build new sporting venues, to purchase equipment to enable novices to learn from qualified coaches, and to facilitate access to sport for those with transportation difficulties. Other specific initiatives to support special target groups include the creation of pilot programs for Midnight Basketball Australia (which is now operating as a DGR in its own right) and the Men's Outreach Program in Broome which is addressing social needs by encouraging participation in football.

In 2009/10, the ASF is celebrating the dual milestones of 25 years of operation and issuing discretionary grants totalling over \$150 million since it began, and looking forward to fostering social inclusion through sport. ■

For more details, visit the ASF website at www.asf.org.au or contact the ASF on (02) 6214 7868.

A gender lens – for clarity of vision

Whether supporting men and boys, women and girls, or everyone – we all need to take a look through the gender lens, explains **Mary Crooks**, Executive Director of the Victorian Women's Trust.



of gender in philanthropic grantmaking. Because this was my bread and butter in a way, I put my hand up to do the job.

So I got to work over the last summer – reading widely, researching the international literature and trying to establish whether there was a quick and easy set of materials for us to pick up and use, even if some re-jigging was required.

Disappointingly, I came to the conclusion that although there was a great deal of material, it was not all that satisfactory. It is frustrating when important and relevant ideas and concepts are bogged down by obscure writing, with limited practical application.

One of the problems is the assumption that gender awareness is simply about becoming more aware of the needs of women and girls, and not boys and men, which is incorrect. Another problem is that a lot of the language around gender is overly academic and confusing. Even the concept of gender itself is usually defined in such laborious and theoretical language as to be rendered fairly meaningless.

And so a new framework came into being, born from this discontent! *A Gender Lens for Inclusive Philanthropy* will be launched in early December 2009.

It calls for a fresh look at gender and its relevance to effective philanthropy. *A Gender Lens* helps us to see more clearly the deeply layered role that gender plays in shaping our male and female lives, work, experiences and choices.

Looking closely at the daily lives and experiences of men and women means appreciating gender difference itself –

Late in 2008, the newly forming Australian Women Donors Network saw the need to create materials to encourage a greater awareness and consideration

picking up on the innate and life-course differences between boys and girls, men and women, and making sure that these differences are accounted for in philanthropic initiatives.

Risk factors and health issues for boys and men are often different to those for girls and women:

- Boys have a higher risk of injury than girls at every age after infancy.
- Transport accidents and suicides are leading causes of death in young males.
- Heart disease, work related accidents and circulatory diseases affect significantly more men than women in the 25-64 age group.

On the other hand:

- Young women are more likely to suffer anxiety and depression than young males.
- Migraine, dementia and alzheimer's disease rank higher for women than men.
- For women, gender specific health needs revolve significantly around menstruation, pregnancy, childbirth and menopause¹.

Imagine planning effective health policy and program responses without this basic information. Imagine allocating health resources without appreciating how different are the circumstances for women and girls compared with men and boys!

Gender awareness also helps us to understand and respond to deep-seated inequalities. Inequalities are by no means confined to women and girls. But on key questions of economic security, health, well-being and political participation – women more commonly experience greater disadvantage and discrimination relative to men.



The implications for philanthropy are clear. If foundations desire to use grants to promote and achieve greater justice and fairness, they need to have gender inequalities at the forefront of their minds and grantmaking.

Finally, increased gender awareness helps to assess the scope for high order philanthropic investment. Despite their under-representation in parliaments and other formal decision making spheres, women and girls play key roles in economic and social development and the growth and maintenance of civil and democratic societies.

Indeed, as understood by leading global organisations such as the United Nations and The World Bank, women and girls are often the pivotal agents of change – initiating and driving reforms that are less likely to come about through other means.

Taking stock of gender will make for more inclusive philanthropy. ■

A Gender Lens will be available for purchase after 1 December. Inquiries to the Victorian Women's Trust www.vwt.org.au

1. www.healthyactive.gov.au/internet/main/publishing.nsf/content/phd-mens_policy



The social inclusion of people with disabilities

Supporting, informing and empowering people with disabilities and their families is key to achieving social inclusion, writes **Di Winkler**, an Occupational Therapist who has worked with people with severe disabilities for nearly 20 years. In 2006, Di founded the Summer Foundation, a not-for-profit that aims to resolve the issue of young people in nursing homes



Young people with disabilities living in nursing homes are one of the most marginalised groups of people in our society – 53 per cent of young people in aged care receiving a visit from a friend less than once per year and 82 per cent seldom or never visit their friends. They are effectively excluded from society with 32 per cent seldom or never participating in leisure activities in the community¹.

A recent report released by the National People with Disabilities and Carer Council called *Shut Out*² concluded that many people with disabilities in Australia “live desperate and lonely lives of exclusion and isolation.” People with disabilities often exert extraordinary effort just to live ordinary lives. Their lives are often “a constant struggle – for support, for resources, for basic necessities, for recognition”.

Improved medical technology has increased the survival rates and life expectancy of people who sustain severe brain injuries^{3,4}. People who would have died at the scene of an accident two decades ago are now surviving with very severe disabilities. People also live longer with degenerative diseases such as multiple sclerosis⁵. This has resulted in a new population of people with severe disabilities and complex care needs that require 24-hour supervision or very high levels of daily care and support, challenging the current disability service system. An estimated 3,500 people under the age of 60 live in nursing homes, which are not suited to their needs⁶.

The Hon. Bill Shorten, Parliamentary Secretary for Disabilities and Children’s Services recently stated that “In a practical sense I believe people with disability are the last frontier of civil rights in this country.” In March 2007, Australia was among the first of about 80 nations to sign the United Nations Convention on the Rights of Persons with Disabilities⁷. The human rights philosophy underpins disability policy in Australia. However, without somewhere to live and sufficient support, the rhetoric in disability policy about empowerment, community inclusion and participation is meaningless.

The disability service sector in Australia remains under-resourced, highly rationed and fragmented^{8,9}. There have often been too many competing perspectives and priorities in the disability sector. Lack of funding means that advocacy groups organised by diagnosis compete with each other for scarce resources⁹. As a result, the disability sector has been ineffective in engaging the general public and putting disability on the political agenda.

As we know, governments tend to be risk averse which limits their ability to lead change and foster innovation in the disability

sector. Much to the frustration of the community, state disability services have been developing a similar model of segregated accommodation and support to people with disabilities since large residential centres started being deinstitutionalised in the 1980s. There needs to be more creative thinking and a range of housing and support options developed so that people have real choice. Sector partnerships are required to ensure that people with a disability get equitable and timely access to social housing and support packages. Leadership for the social inclusion of people with disabilities and major reform needs to come from the non-government sector.

Supporting, informing and empowering people with disabilities and their families is key to achieving social inclusion. More initiatives are required to support a wider range of people with disabilities to make informed choices, tell their story, engage in systemic advocacy and provide leadership in the disability sector. Philanthropy can make a substantial difference through a range of strategies, as shown on the following page.

People with disabilities are part of the population, not a separate population. When considering funding for any projects (e.g. the arts, recreation, childhood development or housing needs), the philanthropic sector should ensure that people with disabilities are included. This is what social inclusion means.

Australia is on the cusp of a significant disability reform. The National Disability Strategy, which is the road map for reform, is still in development. The successful implementation of a national disability insurance scheme would remove existing inequities and ensure that people with a disability have the resources and support they need to live ordinary lives – with somewhere to live, someone to love and something to do. There are moments in time when philanthropy can make a huge difference and this is one of them.



Michelle had just completed the first year of her primary teaching degree when she suffered a near fatal asthma attack which resulted in a severe brain injury. Three months later she was admitted to a nursing home, however, her parents were determined to take her home. Michelle has spent seven long years re-learning to swallow, read, dress, walk, swim and ride a tricycle. She now spends two days per week volunteering at a local primary school and has recently participated Building Better Lives ambassador program, which provides support and media training to enable people with disabilities to tell their stories and get involved advocating for change.



Strategy	Rationale	Examples
Focus on leadership	Fund projects that support and empower people with disabilities to develop leadership skills and engage in systemic advocacy. Fund organisations that actively foster leadership by employing people with disabilities and having people with disabilities on their board.	Building Better Lives Ambassador workshops – support, train and equip young people in nursing homes to get involved in systemic advocacy. ¹⁰
Provide an evidence base	Currently, we are spending \$2 billion each year on disability services in Australia and only investing \$2 million in disability related research. Research projects where universities partner with people with disabilities, families, service providers and government is likely to have the most significant impact.	The housing careers of people with a disability and carers of people with a disability – research conducted by AHURI. ¹¹
Foster the movement for change	Fund grassroots approaches and alliances that empower people with disabilities and mobilise carers, families, service providers and government to work together to educate the public about the issues and solutions related to disability. This will assist in putting disability reform on the political agenda.	National Disability and Carer Alliance (NDCA) – currently focusing on the feasibility of a National Disability Insurance Scheme. ¹²
Demonstrate models that work	Foster and fund the generation of innovative ideas, the development of pragmatic solutions, pilot models of support and the evaluation of pilots.	The Wicking Project – a model of residential care for older people living with a severe alcohol related brain injury. ¹³
Foster and fund collaborative initiatives that provide the creative thinking and the partnerships required to resolve complex and persistent problems in the disability sector.	To achieve significant impact we need to support the cohesion and capacity building of the disability sector, rather than focus on building individual organisations. This involves sharing knowledge, skills, leadership and credit for any success. Collaboration is essential to secure the level of funding required for the whole sector and lead the reform of disability services. A whole of government approach is required.	Summer Foundation Property Advisory Panel – an incubator for ideas and creative thinking about integrated supported housing for people with disabilities. ¹⁴

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14. Summer Foundation Ltd. www.summerfoundation.org.au.

Di's blog can be found at <http://diwinkler.typepad.com/weblog/>
 The Summer Foundation's website is at www.summerfoundation.org.au
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SUMMER
FOUNDATION

The arts driving social inclusion

The arts, and specifically community and cultural development programs, are proven tools for driving positive social change and supporting community wellbeing, writes **Ivana Jirasek**, Coordinator of Artsupport Australia.



The transformation of dysfunctional communities through the intervention of arts practices

such as theatre, music, singing (consider the recent growth in community choirs), dance, writing, painting, photography, video and multi-media is well documented. The reported benefits are many for both participants and the wider community – with social inclusion high on the list.

Many social groups suffer isolation and discrimination through systemic and long-term situational and institutional disadvantage – consider the disabled, the aged, Indigenous, youth-at-risk, unemployed and those in regional and remote Australia. The Australia Council for the Arts has supported community and cultural development (CACD) programs over four decades to build healthy community engagement, and confers an annual Ros Bower Award for excellence in the field.

Artsupport Australia works with hundreds of arts organisations nationally, many of whom provide effective programs to address a diversity of social needs. It helps them build their philanthropic income and equally works with many philanthropists, trusts and foundations



A child participating in an ArtStories program.
Photo: Catherine Threlfall.

to source projects that meet their specific areas of interest. Artsupport Australia provides mentorship, advice or referrals – all as a free service. Some of its clients include:

ArtStories

In 2003, Darwin-based music therapist Anja Tait formalised the long-term development of ArtStories, an arts-based model – using music, songs, visual arts and storytelling to teach language and literacy. An early three-year grant from the Westpac Foundation; enabled the innovative multi-lingual and inter-generational approach to be trialled at remote and regional communities of Northern Territory. This included the Numbulwar Community Education Centre, an Indigenous learning hub with over 200 students, for many of whom English is a third language. ArtStories' success led to the support of government and institutional partners, including the Northern Territory Library, which has embraced the program and its capacity for national and international application.

Australian Centre for Photography

The Matana Foundation for Young People has supported the Australian Centre for Photography (ACP) to pilot a program for marginalised youth from wider Sydney. Run in partnership with Oasis Youth Support Network, the program involves training small groups of young people in photography and personal development in bi-weekly sessions over 10 weeks. It will culminate in a group exhibition at the Centre's gallery during the peak visiting period prior to Christmas – marking a personal and public rite-of-passage. The photographic medium is a very liberating tool, with vast social reach enabled by digital technologies. The program's ability to grow participants' creative and commercial potential as well as social engagement brings a very powerful community benefit.

Tutti Ensemble

Adelaide-based Tutti Ensemble has received international acclaim for integrating artistic excellence and social inclusion. It provides unique

training, services and opportunities for South Australian school leavers with disabilities in music, drama visual arts and digital design. Its programs include Tutti Kids, a music and drama program for disabled children 2-12 years age, to build early concentration and social skills to support achievement and independence in later years. The Macquarie Group Foundation has supported Digitech, a film-making and animation program devised to develop important skills for young adults in digital communication to enable greater social exchange and connectedness. Sellout performances at the 2009 Adelaide Fringe for 'The Shouting Fence', a choral collaboration with the State Opera of South Australia, had a cast of 150 ranging from five to 85 years of age, including about 60 per cent with disabilities.

Philanthropy is a crucial source of income for these organisations, and Artsupport Australia is on side helping develop their individual donor programs, and bringing them to the awareness of appropriate philanthropists and foundations. ■

Artsupport Australia is an initiative of the Australia Council for the Arts to grow cultural philanthropy
www.australiacouncil.gov.au/phillyanthropy

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Public libraries – a community of interest

Libraries play a unique and well documented role in social inclusion, explains **Daniel Ferguson**, founder and Executive Director of Friends of Libraries Australia (FOLA). FOLA is a national voice for the 60 per cent (12 million) of people of all ages and circumstances who use and value public libraries, and for the 13 per cent of people who – the major research study *Libraries | Building | Communities* found – would also use them if they were more accessible.

The public library is the one place where everyone in our society – the mentally ill, those that left school at 15, those struggling with poverty, the unemployed, those who don't speak English, and those who are socially isolated – can come in without any fear of expectations or prejudice, can feel safe and comfortable and can experience a sense of community and belonging. That is social inclusion in action.

Public libraries are early childhood literacy developers, school and homework support providers, and lifelong learning agencies – an essential complement to formal education, but to date an overlooked investment in the Australian government's Education Revolution. As Germany's Bertelsmann International Foundation for Public Libraries asserts:

The classroom is not the only place where learning occurs. To be successful in today's information society, people need access to individual educational options that suit the diverse learning needs we encounter throughout an entire lifetime. One place that reflects the diversity of human knowledge exceptionally well is the public library.¹

They are also key facilitators of social interaction – with mobile libraries delivering books in person to residents in nursing homes and those who are housebound by infirmities or living in isolated rural communities.

The *Libraries | Building | Communities* research² shows that public libraries play a crucial role in building social capital:

- Bringing people together from across the social strata.
- Forging greater understanding of other perspectives and other cultures.
- Offering a safe space that embraces diversity; and



The township of Benalla in central Victoria has an active Friends of the Library group who are lobbying for a new library to replace an outdated building which handicaps the community and impedes opportunity.

- Providing connection into the community for people who are otherwise excluded.

Libraries are actively overcoming the digital divide, providing free access to and training in information technologies for people of all abilities. Library staff help people to navigate the mass of online information and to build their own skills; in English language, in literacy, job searching or computer skills.

As community hubs, public libraries offer free, safe and convenient spaces for communities to meet and participate in the life of the community.

Yet, despite these successes, expenditure on public libraries still represents only 3 per cent of total Australian local government expenditure. This is modest for what is invariably, (even when they are under-resourced and in desperate need of basic maintenance) a local authority's most heavily used and valued community provision – its iconic 'window' to the community.

Given an outstanding return on public investment of conservatively \$5 for every dollar spent, and at only 9 cents per day³ – one third of international best practice public library funding – we need to ask:

where is Australia's vision? Public libraries are receiving, on a usage basis by far the lowest per capita funding of any educational, cultural or civic provision, yet are in the forefront of social inclusion initiatives.

Working in partnership with community groups, service providers, philanthropy and government, public libraries are ideally placed to maximise social inclusion outcomes across Australia.

We do not assume that everyone who experiences exclusion has to be 'rescued' from that experience. But we do hold the view that a responsible society will give all its members opportunities to become connected to others and to the benefits that society offers, should they wish to take advantage of them... libraries and information services have a fundamental role to play in that provision.³ ■

www.fola.org.au

1. Bertelsmann Library Foundation www.bertelsmannstiftung.de/cps/rde/xchg/bst_eng/hs.xsl/338

2. *Libraries/Building/Communities: the vital contribution of Victoria's public libraries* Library Council of Victoria, http://www.slv.vic.gov.au/about/information/publications/policies_reports/plu_lbc.html

3. Ibid, report 3 Bridging the Gaps.

John Atkin

As part of its social inclusion agenda, the government is exploring ways to develop a new and stronger relationship with the third sector, largely based on partnerships. To this end they are developing a 'National Compact between government and the third sector', to contain key priorities and principles for this relationship. Charged with developing a framework for the Compact is the National Compact Joint Task Force, comprising 18 members from third sector organisations, commonwealth government agencies, local government and unions. **John Atkin**, Managing Director and Chief Executive Officer of Trust Company, is the Chair of the Task Force, and he spoke to *Australian Philanthropy*'s Mary Borsellino about the Compact and philanthropy.



How do you come to be the Chair of the National Compact Joint Task Force?

Senator Ursula Stephens knew of my background with Trust Company and my interest in philanthropy and she felt bringing someone new and fresh in as an independent chairman might assist the dialogue of the Joint Task Force.

My background is in law, and since January 2009 I've been the CEO of the Trust Company, which was established in 1885. We have about \$400 million in philanthropic funds and we distribute about \$20 million a year to different charities. I'm also on the board of the Outward Bound Australia Foundation.

The National Compact is described as an agreement between the government and the third sector outlining how the two will work together to improve and strengthen their relationship and thereby benefit the community. What does this mean in practice?

By its nature, the compact is looking to develop the working relationships between the government and the third sector over time. We need to consider the five to 10 year implementation of the Compact. However, as part of our work on the Task Force we have identified priority areas for the framework: The key ones are:

- (a) Document and promote the value and contribution of the third sector. The recent draft report from the Productivity Commission has looked at where things can be improved, and also it's put into the public record just how important the sector is.
- (b) Protect the sector's right to advocacy – independent and irrespective of any funding relationships. For certain parts of the third sector there had been a very unhappy history where funding contracts included 'gag clauses', but now those are all removed.
- (c) Recognise the diversity of the sector, both in the consultation process and in the initiatives. One of the issues we had to grapple with early in the task force was how the government defines the third sector, including not only the social charities but extending out into arts bodies, environmental bodies, industry associations, sporting clubs, unions, leagues clubs and so on. So we had to develop a set of principles which applied to that broadly-defined sector.
- (d) Provide greater information access, particularly to publicly funded research data. An issue that came out really strongly was a difficulty in accessing Department of Health and other research about social conditions and illnesses which was relevant for programs which groups were trying to develop. Social charities couldn't get access to information about drug and alcohol rehabilitation programs, information which is just sitting inside government bodies.
- (e) Reduce red tape and streamline reporting. At the moment organisations may have to write three different reports for three different departments, presenting the same information but in three different ways. Similarly, increasing the consistency and simplicity of financial arrangements between the government funding bodies – both state and federal – and participants in the third sector.

- (f) Address paid and unpaid work issues. There was a lot of cheap press recently about some of these bodies being exempt from fringe benefits tax, enhancing the remuneration they pay to employees. But they do that in the context of the people working for charities getting paid well below market rates.
- (g) Improve funding and procurement processes. If you speak to FaHCSIA, they actually rely on participants in the third sector to deliver billions of dollars worth of programs. To improve that whole process so it works more efficiently and people get a stronger outcomes-based focus is really important.

Putting your trustee hat on, what do you think the compact might mean to the philanthropic sector in particular?

I would hope that philanthropic organisations such as Trust Company who are investing – and I use that word deliberately – the charitable monies into participants in the third sector would consider adopting the leadership principles set out in the Compact. In that way we would promote a much more multi-lateral working relationship between government funders, private funders such as ourselves, and recipient social charities, or research institutions, or arts or environment bodies. I think that by promoting a sense of leadership around philanthropy, we will be able to tap into the enormous resources – not only financial, but also the human talent – in business communities and elsewhere in society. That's where the big return on the principles will be – an enhanced return on that philanthropic investment.

“I think that by promoting a sense of leadership around philanthropy, we will be able to tap into the enormous resources not only financial, but also the human talent – in business communities and elsewhere in society.”

What role do you see for philanthropy in promoting social inclusion, given that many philanthropic foundations are reluctant to put funds into areas they see as falling under government's responsibility?

I would encourage philanthropic foundations to invest it in capacity building. So much of the government money goes into support of particular programs. Given the constraints on the government budget, they'll always be looking for the lowest cost, most efficient delivery on those programs.

Or alternatively, I would encourage philanthropic organisations to focus on marginalised or disadvantaged communities that are otherwise in danger of missing out on the general social net that the government and major social charities provide. When I was at Blake Dawson, their pro bono campaign was very focused on marginalised communities that didn't have the access to the government safety net programs.

Is mainstream Australia resistant or receptive to the concept of reaching out to the disadvantaged?

I think it's increasingly receptive. Maybe it's a slight generational issue, in our ageing population. My brother-in-law, who just turned 60, says that life's divided into three stages: learning, earning, and returning. As the baby boomers move from the earning stage of their life they will increasingly look for purpose beyond work and material possessions. I think they will increasingly look for engagement in philanthropy.

It's almost like a hierarchy of needs, in that when people reach a certain level of comfort in their own lives, their ambitions suddenly become much broader for how they want to help the rest of the world.

I think the 'hierarchy of need', as described by Maslow, is a false construct based on a very individualistic, zero-sum approach which encourages people to focus on their consumerist needs. The problem with Maslow's theory is that it doesn't explain why there are so many happy people in what are otherwise impoverished countries like India, nor does it explain why in Australia, despite an unprecedented improvement in economic conditions over the last 20 years, we have had a steady increase in depression right through that period.

The problem with the hierarchy of need is that it focuses you in on what you don't have. It plays to people's sense of personal anxiety. Philanthropic activity, on the other hand, encourages you to consider matters of a higher order – beyond yourself.

I think what happens is that as people get older – say turn 60 – their mortality is much more apparent to them than it was at say, 40. They realise just how ephemeral and transient the material parts of life are, so they yearn for a sense of purpose that transcends material wealth.

What will the indicators of the National Compact's success be?

Turning the relationship from a contracted relationship based on a sense of obligation to a mutually respectful partnership based on principles of leadership is at the heart of what we're trying to do. We'll be able to measure our success in terms of better outcomes, better targeting of resources, and a growth in the capabilities and capacities of the organisations in the third sector itself.

Governments and philanthropy have been working to address poverty and disadvantage for almost a century (since the Great Depression), albeit on a smaller scale than at present – is this term 'social inclusion' just a buzzword or does it represent significant shift?

We're using the term 'social inclusion' as a label to encapsulate a lot of ideas. The key word is inclusion, and the outcome of inclusion is engagement. At its heart this is a leadership-based approach rather than a duty/obligation-based approach, so it's encouraging people to lead, to include and engage others. This is a different way of looking at things, and in that sense I think it's really powerful. ■

Philanthropy – supporting ‘at-risk’ youth

Chris Wootton, Grants Executive at the Helen Macpherson Smith Trust and **Faye Whitehead**, Senior Project Officer at the Victorian government’s Office for Youth, present their collaborative partnership model for supporting youth at risk of social exclusion.

The term ‘at-risk’ is “generally used to describe youth who come from disadvantaged circumstances who show signs of emotional or behavioral problems, or who are at risk of disengaging or face barriers to participating fully in their communities, and/or who may lack confidence and the support to navigate developmental tasks successfully.”¹ In this decade, we have seen an exponential increase in the development of mentoring programs to address issues and problems faced by young people deemed ‘at risk’.

The Victorian government defines mentoring as “the formation of a helping relationship between a younger person and an unrelated, relatively older, more experienced person who can increase the capacity of the young person to connect with positive social and economic networks to improve their life chances.”²

Mentoring can develop naturally, arising from everyday situations where anyone can assume a volunteer role of a mentor, or in a planned and structured program, where the mentor and the mentee are chosen from a list and matched through a formal procedure, as in the case of most ‘at risk’ youth programs.³

“Mentoring is not for everyone and not all mentoring is good.”

Whilst the concept of mentoring is not new, surprisingly there has been very little research and evaluation into the effectiveness and impact of such programs. Anecdotal evidence suggested that many mentoring programs for ‘at risk’ youth may pose a severe risk of doing ‘more harm than good’ if they are established without appropriate:

- support for mentors and mentees e.g. training, role definition, guides and matching;
- resources being allocated e.g. referral systems, help lines and travel support; and
- understanding of the needs of youth who have very complex needs, which may be beyond the experience of primarily volunteer mentors.³

These concerns were the driving force behind the establishment of the collaborative partnership in 2007 between the Helen Macpherson Smith Trust and the Victorian government (The Office for Youth, Department of Planning and Community Development), to conduct the Mentoring and Capacity Building Initiative (MCBI).⁵

The MCBI actively builds partnerships and the capacity of organisations across the state to support, expand and improve the quality of mentoring programs involving young people living in disadvantaged circumstances or environments. Both organisations identified the need and were able to leverage funds off each other at a scale which could lead to a significant improvement in the quality of youth mentoring.

Under this collaborative program, the Trust and Office for Youth jointly funded:

- six regional youth mentoring coordinators, who are hosted by community organisations operating youth mentoring programs. Their role includes training, information sharing, supporting new mentoring programs and the development of best-practice tools and guides;
- an initial evaluation by Victoria University of the first year of the project;
- a more detailed evaluation of the effectiveness of youth mentoring across the state in 2010 and 2011; and
- organisational development for the Victorian Youth Mentoring Alliance (VYMA).

The Office for Youth provides overall project management, targeted youth mentoring grants and other services and initiatives related to young people. The Trust provides strategic independent advice and direct operational support for the six regional coordinators and their host organisations and participates at quarterly regional coordinators meetings. So far, the program has provided support to 159 Victorian youth mentoring programs, involving over 4,500 young people and 4,200 volunteer adult mentors.³



Mr Michael Poulton, Chairman VYMA, The Minister for Youth Affairs, the Hon. James Merlino MP, Ms Sarah Johnson, Executive Officer VYMA and Mr Darvell Hutchinson AM, Chairman, Helen Macpherson Smith Trust at the launch of the 2010 and 2011 Youth Mentoring Partnership (July 2009).



Learnings

The learnings arising from this project are summarised under three key questions:

1 Why a collaboration with government?

Successful youth mentoring programs require extensive collaborations between government, community organisations, the philanthropic community, corporations and individuals and cannot be conducted by government alone. Strategically, the Victorian government took the lead in relation to strategies to address 'at-risk' youth, however due to competing priorities, the level of funding and emphasis on youth mentoring would have been significantly reduced (i.e. a limited pilot project in only three regions may have been possible).

In relation to the Trust, we did not have sufficient resources to fund a state-wide program and would have continued, without the collaboration, by funding a limited range of ad hoc mentoring programs that would have little or no access to quality support, tools and networks.

2 What was the value-add of each partner?

In addition to its leveraged funding, the Trust has brought to the project:

- insights as an independent third party;
- an emphasis on independent evaluation and a longer-term evaluation of benefits and impact of youth mentoring; and
- the desire to establish the VYMA as a sustainable peak body.

In addition to their leveraged funding, the government brought to the project:

- an integrated strategy to address 'at-risk youth' which included youth mentoring;
- additional funding options for community organisations e.g. targeted programs;
- a 'whole-of-government' approach to youth mentoring;
- strong Ministerial support;
- communication and promotional resources e.g. materials, good practice guides and launches; and
- linkage with federal government and other national organisations.

3 What other learnings arose from the project?

This collaborative project arose from a common interest to improve the quality of youth mentoring across Victoria. To reflect this, a memorandum of understanding was approved, rather than a standard government 'rigid' contract. The whole process has been a learning exercise and has required many issues to be clarified along the way. Continuity of key personnel involved in the project has been an important element of the success of this project.



A mentor and mentee join the celebrations at Youth Mentoring Week 2008.

Benefits for the future

We envisage that this collaborative project will lead to further significant improvements in youth mentoring programs across Victoria. It is hoped that through this project, combined with evidence-based research demonstrating the benefits to be derived from quality youth mentoring programs, it will lead to additional investments in youth mentoring programs by socially responsible corporations, community organisations, and the philanthropic sector.

“You cannot do a kindness too soon, for you never know how soon it will be too late.”

Ralph Waldo Emerson (American philosopher 1803-1882)

In conclusion, mentors are doing a kindness when they take on the responsibility of helping other people learn from their experiences. Through these relationships, mentors can give back to society and the person they are mentoring can achieve career growth, personal development or intellectual development.¹

At-risk youth need our support and encouragement and we see this collaborative project as a fundamental systemic role for a philanthropic trust and the government to undertake, which will lead to a significant positive impact on the lives of young people across Victoria. ■

1. Keating, L. M., Tomishima, M. A., Foster, S. & Alessandri, M., 2002, "The Effects of a Mentoring Program on At-Risk Youth". *Adolescence* 37.148, Winter p717.
2. Victorian Government 2005, *Leading the Way: Strategic Framework on Mentoring Young People 2005-2008*.
3. <http://www.linkroll.com/mentoring/a-definition-of-mentoring.php> (Accessed 12 August 2009).
4. Broadbent, R. & Papadopoulos, T., 2009, *Evaluation of MCBI Regional Coordination*, Victoria University.
5. Victorian Government 2006, *A Guide to Effective Practice for Mentoring Young People*.

Ageing futures

Despite the significant growth in the number of older Australians, modern Australia still has a strong focus on youth. One outcome of this is ageism: discrimination against, stereotyping of, marginalising or excluding older people. **Anita Hopkins** and **Fleur Bernasochi**, from Philanthropy Australia's Ageing Futures Affinity Group present a framework to assist philanthropic endeavours to promote positive ageing.



The care of older people is the single biggest health issue facing Australia in the 21st century. Australians are living longer than ever before. When

Australia's first retirement age was set in 1909 at 65 years of age, the average life expectancy for the Australian male was 58. Today, Australian men live an average of 13 years past retirement age, and Australian women, another 17 years. It is expected that by 2035, people over 65 will comprise 45 per cent of the voting public^{1,2}.

Healthy ageing requires a range of conditions, including social connection.³ The growth in the number of older people and the diverse nature of Australia's older population presents many challenges to achieving social inclusion; including aspects of ethnicity, geographical location, socio-economic status and health. In looking at the international experience of ageing and social inclusion, a 2006 report from the UK⁴ stated that the experience of social exclusion in later life can be particularly acute for people who already feel isolated in mid-life, for it can be difficult to break the cycle of exclusion.

In our society, ageism remains a serious human rights issue. Discrimination against the aged is broadly acceptable today, in the same way that sexist and racist behaviour was in the past. Alarmingly, the increasing incidence of elder abuse is now a serious social issue;⁵ recent research indicates that between 1 and 5 per cent of senior Victorians may be experiencing some form of harm or abuse.⁶

If we don't seek to address issues of social exclusion then we heighten the

risks of associated with those issues. It is important to ensure that the diverse voices of older Australians are heard.

Ageing Futures Affinity Group

The work of Philanthropy Australia's Ageing Futures Affinity Group has demonstrated that there are many ways to strengthen social inclusion of older Australians, including:

- promoting intergenerational solidarity;
- enhancing the development of inclusive communities; and
- focusing on the issue of ageism as a human rights issue.

The Group has deliberated on the fact that, when the aged are mentioned, people seem to think of the frail older people in aged care homes. Even in philanthropy, donors and foundations often think of aged care facilities first when looking to support programs for older people.

“Clearly the vast majority of seniors are not living in aged care facilities and most likely never will, so it makes sense for the focus to be on supporting this cohort to continue to be active and engaged members of their communities.”

In this vein there has been significant recent work done in aged care by The Myer Foundation with its report *2020 A Vision for Aged Care in Australia* and the J.O. & J.R. Wicking Trust, which is

dedicated to addressing ageing and Alzheimer's with a focus on innovation and systemic change.

However, the surprising reality is that on census night in 2006 only 7 per cent of people over 65 were residing in aged care facilities. Clearly the vast majority of seniors are not living in aged care facilities and most likely never will, so it makes sense for the focus to be on supporting this cohort to continue to be active and engaged members of their communities.

“Additionally, key events in later life, such as bereavement or retirement from work, can lead people to become excluded, and age related prejudice can limit an individual's opportunity to overcome these.”⁷

What should philanthropy be funding?

How can philanthropy best respond to ensure that the interests and needs of older Australians are considered in a healthy, inclusive society? Despite the fact that applications for equipment in aged care facilities dominate the submissions in this field, many philanthropic organisations are questioning whether their funds are best used for purchasing equipment, given this can be deemed to be a government responsibility. What other giving opportunities are available in this sector?

The Ageing Affinity Group has developed a framework which attempts to provide philanthropists with some direction and ideas about the full gamut of opportunities available to fund in this arena. The Ageing Futures Framework highlights options to fund more practical and engaging projects, encouraging the pursuit of new approaches and attitudes to ageing. There is a strong emphasis in the Framework on projects that work towards social inclusion and ageing well.



Ageing Futures Framework for Philanthropic Individuals and Organisations

(This is an extract, to view a full version of the Framework go to www.philanthropywiki.org.au)

Themes	Strategies	Project examples
Ageing well	<ul style="list-style-type: none"> Building more older person friendly communities. Addressing barriers to equal opportunities for ageing well. 	<ul style="list-style-type: none"> Long term marriage and its impact on healthy ageing Two PhD scholarships with the Healthy Ageing Research Unit (HARU) at Monash University. Singing, a healthy way to life a Musica Viva project. Facilitating spiritual reminiscence Development, Implementation and Evaluation of a Learning Package.
Supporting diversity	<ul style="list-style-type: none"> Encouraging the development of ageing strategies for older people that reflect the most diverse demographic in the Australian community. 	
Creating multigenerational environments	<ul style="list-style-type: none"> Building intergenerational links. Providing opportunities to share skills and experiences across generations. 	<ul style="list-style-type: none"> Grandparents Alliance delivered by COTA NSW.
Building better approaches for service delivery to older people	<ul style="list-style-type: none"> Listening to older peoples' experiences of services. Funding new approaches and service models. Supporting workforce development. 	<ul style="list-style-type: none"> Manningham Centre Association Providing internet access for people living in a nursing home. Older Persons Action Centre Consultations with older people about their experience of accessing public transport and suggested solutions. Establish a Teaching-nursing home Develop and create teaching modules based on real nursing homes in the virtual world using Second Life.
Promoting the human rights of older people	<ul style="list-style-type: none"> Education and prevention of abuse and mistreatment. Addressing age discrimination. 	
Changing government, business and community thinking about ageing	<ul style="list-style-type: none"> Addressing implications of growing inequities in income/resources. Government policies impacting on older people. 	

Positive Ageing

As Rhonda Parker, Australia's Aged Care Commissioner, points out:

"Ageing does not prescribe decline as we have previously understood it. Recent research has established that only approximately 30 per cent of physical ageing can be traced to our genes – the rest is down to lifestyle choices."

One goal of the Ageing Futures Affinity Group is to promote philanthropy that supports positive ageing, and the Framework is a practical tool which should encourage this. The Framework is available on the PhilanthropyWiki, and will be reviewed annually. ■

For further information Anita and Fleur can be contacted at State Trustees Ltd on telephone (03) 9667 6740.

"Ageing does not prescribe decline as we have previously understood it. Recent research has established that only approximately 30 per cent of physical ageing can be traced to our genes – the rest is down to lifestyle choices."

1. Presentation to the Ageing Affinity Group on November, 2008, "Philanthropy's contribution towards a positive ageing experience for older Australians".
2. The proportion of people aged 65 years and over is expected to increase to 26 per cent by 2051. There were nearly 300,000 people aged 85 years and over in Australia in 2004, making up 1.5 per cent of the population. This group is projected to grow, to 2-3 per cent by 2021. Australian Bureau of Statistics, 2007.
3. Abstract for "Protecting Elders' Assets," paper to present to the International Federation on Ageing 10th Global Conference, Melbourne 3-6th May 2010, WAINER Jo, DARZINS Peteris, owada Kei, CUBIS, Jacinta.
4. *A sure start to later life: ending inequalities for older people*, Social Inclusion Unit UK, Office of the Deputy Prime Minister, 2006.
5. Gerry Naughtin, presentation to the Ageing Affinity Group on November, 2008, "Philanthropy's contribution towards a positive ageing experience for older Australians".
6. Rights, Respect, Trust: Victorian Government Elder Abuse Prevention Strategy, April 2009.
7. Ageing Futures in Australia Discussion Paper: "Positioning Philanthropy: Creating Age Friendly Communities".

A hand-up not a hand-out

Since 2003, NAB has committed over \$130 million to microfinance, taking a leadership position to support and develop respectful not-for-profit products that meet the needs of people living on low incomes, financially marginalised from mainstream banking. Community Finance and Development manager **Jackie Coates** explains how relationships and collaborations are central to their microfinance programs.

As part of our commitment to strong relationships with our customers and the broader community, the National Australia Bank (NAB) supports a range of innovative microfinance programs that include affordable personal and business credit, transaction accounts, savings accounts and insurance. The programs are internationally unique for developed economies and NAB has been recognised by five Money Magazine Best of Best Awards for socially responsible products.

The National Australia Bank's collaboration with Good Shepherd Youth & Family Service has greatly influenced our response to social exclusion, which has been twofold – partnership and microfinance. Working closely with Good Shepherd Youth & Family Service we've developed new credit and savings products. Over the years our microfinance commitment has grown to over \$130 million and along the way we've learned some home truths that guide our work in this area:

- Understand your limitations, leverage your strengths; at NAB we understand that our strength is our banking platform and the provision of finance.
- Trust takes time, and partnerships need to be equally weighted.
- Learn to talk a shared language: timelines, priorities and expectations need to be explicitly specified; it is important to keep communications channels open and honest.
- Act local: nationally coordinated, locally controlled programs works best for communities.
- Listen: appreciate that you don't know all the answers and one size doesn't fit all. Engage the stakeholders you want to support.
- Balance: find ways to balance the need to make processes efficient, while maintaining a supportive service approach. One need shouldn't happen at the expense of the other.
- Collaborate: demand for microfinance is large and program scale, quality and awareness can be maximised with a whole-of-community approach.

Strong working relationships between corporate, community and government sectors are essential. Community and government partners are crucial to get the necessary outreach and expertise with low income Australia. With NAB's support these programs are not capital constrained, however operational funding is a challenge for microfinance programs which are high-touch, therefore high-cost, requiring us to work in new ways and involving cross-sector partnerships.

NAB supports four not-for-profit microfinance programs in partnership with community and government sectors. NILS®, StepUP and AddsUP programs are delivered in collaboration with Good Shepherd Youth & Family Service and many state community agencies, with support from state and federal



governments. NAB's Micro-enterprise Loan program is delivered with business-training agencies that train, source and mentor loan applicants.

1 No Interest Loan Scheme (NILS®) – In 2009, NAB increased its NILS® commitment from \$10 million to \$15 million to expand the program nationally. NILS provides small loans at no interest for the purchase of essential goods and services (between \$800 and \$1,200). It is anticipated that NAB's support will fund 200 new schemes by 2012. The NILS® trademark is registered to Good Shepherd Youth & Family Service (No 766836).

2 StepUP Loans – Launched in 2004 and developed by NAB and Good Shepherd Youth & Family Service, StepUP is a bridge between NILS and mainstream credit to provide small loans of up to \$3,000 at an interest rate of 3.99 per cent. Since its launch, the program has lent over \$4.6 million.

3 AddsUP Savings Plan – Launched in 2009, NAB developed AddsUP to give people an incentive to save. Once in the lifetime of the account, NAB matches account balances to a total annual value of \$500. AddsUp is offered via NAB's NILS and StepUP community partners. In 2009, the program was launched in Queensland and Victoria.

4 Micro-enterprise Loans – Launched in 2007, NAB provides not-for-profit business credit to people with few or no avenues to access affordable credit. Applicants are sourced by business literacy training providers who also provide mentoring in the first twelve months of the loan. Over 211 enterprises have received unsecured, not-for-profit business loans of between \$500 and \$20,000, totalling \$3.1 million.

Ultimately, as a bank we recognise NAB has a special role in the economy and broad responsibilities in the community to ensure these options remain safe, affordable, accessible and sustainable for future generations. ■

<http://www.nab.com.au/microfinance>



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La Trobe University Foundation
Leukaemia Foundation of Australia
V. Lloyd
Macquarie University
Mater Foundation
MDM Design Associates
Medibank Private
The Melbourne Anglican Foundation
Melbourne Recital Centre
Mercy Health Foundation
Mission Australia
MJD Foundation
Monash Institute of Medical Research
Monash University
MS Research Australia
MS Society NSW/VIC
Murdoch University
The Myer Family Office
National Heart Foundation of Australia
The Nature Conservancy
NIDA
Northcott
The Oaktree Foundation
Oxfam Australia
Parramatta City Council
Peter MacCallum Cancer Foundation
Philanthropy Squared
Plan International
The Pyjama Foundation
The Queensland Art Gallery Foundation
The Queensland Folk Federation
Queensland Library Foundation
Rachel J Kerry
Reconciliation Australia
Regional Development Australia-Sydney Inc.
Research Australia Philanthropy
Room to Read Australia Foundation
Royal Botanic Gardens Melbourne
Royal Botanic Gardens Sydney
The Royal Children's Hospital Foundation (Qld)
The Royal Children's Hospital Foundation (Vic)
Royal Rehabilitation Centre Sydney
Rural Health Education Foundation
The S. R. Stoneman Foundation
The Salvation Army (Southern Region)
Save the Children Australia
Scope (Vic)
Senses Foundation Inc.
SMILE Foundation
The Smith Family
The Spastic Centre
St. George Foundation
St Mary's Cathedral Hobart Restoration Commission
St Paul's Anglican Grammar School
St Vincent de Paul Society of Victoria
St Vincent's & Mater Health Services
Starlight Children's Foundation
The State Library of NSW
The State Library of Victoria Foundation
Stewart Partners
Surf Life Saving Foundation
Sydney Institute of Marine Sciences
Sydney Opera House
Sydney Theatre Company
Taralye
The Travellers Aid Society of Victoria
UCA Funds Management
United Way Australia
University of Melbourne – Advancement and Communications Unit
The University of Melbourne – Alumni Office
University of New South Wales
University of South Australia Foundation
University of Sunshine Coast
University of Tasmania Foundation
VicHealth
Victoria University
Victorian College of the Arts
Vision Australia
Volunteering Australia
Warakirri Asset Management
Western Australian Institute of Medical Research
Westmead Medical Research Foundation
Whale & Dolphin Conservation Society
Whitelion
Wise Community Investment
World Society for the Protection of Animals
Youngcare
Youth Off The Streets



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