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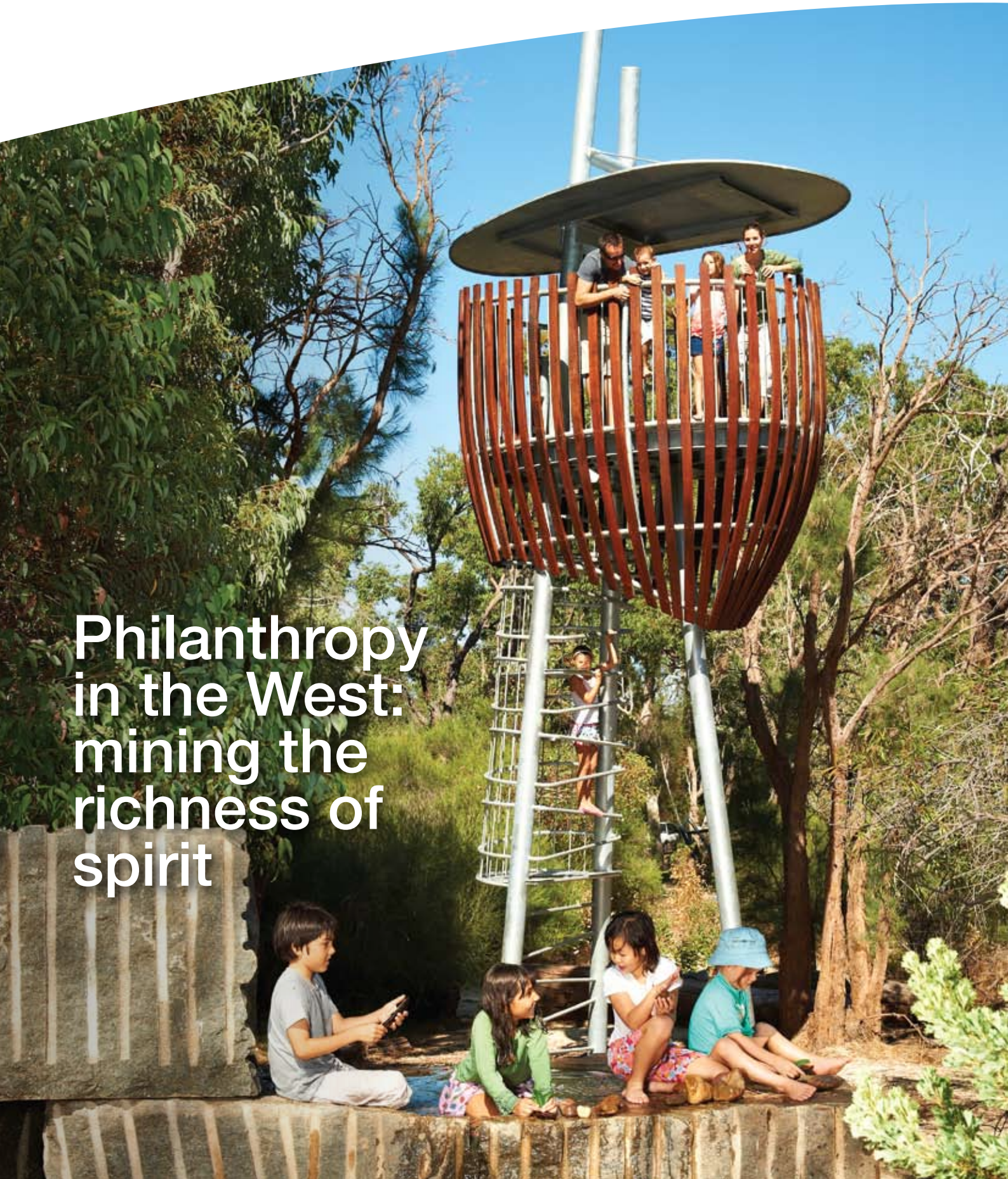

Philanthropy in the West: mining the richness of spirit

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 more giving Australia.

Our mission
To lead an innovative, growing, influential and high performing philanthropic sector in Australia.

Philanthropy
Philanthropy is the planned and structured giving of time, information, goods and services, voice and influence, as well as money, to improve the wellbeing of humanity and the community.

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

This issue of *Australian Philanthropy* is proudly supported by lotterywest

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Front cover
Cover photograph by Frances Andrijich shows Rio Tinto Naturescape, Kings Park, Perth; a place for children to connect with nature, have fun and appreciate the bush environment. Naturescape was funded through a true community partnership – Rio Tinto, Water Corporation, Lotterywest through the Friends of Kings Park and the Perth Solar City program. Volunteers have also been vital to the project including planting 40,000 plants and working as trained 'Naturescapers' to encourage fun, exploration and learning among young visitors. *www.bgpa.wa.gov.au*

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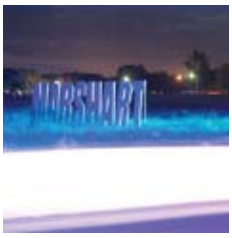





From the President and CEO

Western Australia is the focus of much attention across Australia at the present time – from the media, the public and governments – as it is at the centre of the largest and most sustained expansion of mining and associated infrastructure in Australia's history. The growth has many dimensions including supply shortages, a hunger for capital and people, and opportunities, including for Western Australia's large Indigenous population.

Australia has experienced mining booms before, but not on this scale. The gold rush of the nineteenth century created substantial wealth in Victoria, swelling the State's population sevenfold within a decade and developing infrastructure to cope. A number of individuals who had made fortunes in the gold rush stayed on and became generous benefactors: many eventually left money for the establishment of charitable trusts, aided by the Victorian tax system which provided relief from death duties.

Many Australians are hoping that the current resources boom in WA will lead to a corresponding burgeoning of philanthropy in that State. Certainly there has been a corresponding jobs boom and a massive need for new infrastructure, as occurred in the gold rush. However the context is substantially different from the 1850s. Mining now proceeds on a scale undreamed of in the nineteenth century, and is generally carried out by large public companies rather than by individuals and private concerns. The far reach of media and the public's access to information puts today's business leaders under more public scrutiny than their predecessors; they operate with much higher expectations from the community and government, not least that the West's new prosperity will result in a greater level of philanthropy in WA.

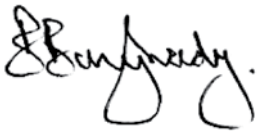
Commentators including philanthropist David Gonski, World Vision CEO Tim Costello, and WA Governor Malcolm McCusker – who is interviewed in this issue – have called upon the people of Western Australia to begin creating and shaping a philanthropic legacy. Given the enormous scale of the resources development in WA there is the opportunity to establish an even larger philanthropic base than in Victoria. Yet the latest available taxation statistics indicate that WA has the lowest percentage of donating taxpayers of all the states, and donors in the West donate on average a smaller percentage of their income than all other states and territories except the Northern Territory (Source: QUT Working Paper CPNS 54: An Examination of Tax Deductible Donations Made By Individual Australian Taxpayers in 2008-09).

Given these figures, what is the key to enabling a flow of profit from the West's resources and other growth businesses to channel into philanthropic wealth for community benefit? Is there a need for a deeper understanding of the long term benefits of philanthropy, or more Western Australian champions to publicly embrace giving and enthuse their peers?

Or is giving in WA already happening, but in ways that are not currently known through tax deductible donations or established foundations? For example, are social enterprises and giving circles having a positive impact on giving? Certainly the philanthropic sector in the West contains an intriguing mixture of established philanthropic legacies as well as those with newer wealth. It is also clear that many companies are contributing through their foundations, community investment programs and as part of their corporate social responsibility.

This edition of *Australian Philanthropy* explores some of these issues, and highlights and celebrates the unique nature of Western Australian giving. It is a joint effort between Philanthropy Australia, Giving West and Lotterywest. We thank Lotterywest for funding this edition, and for the work of Kevin MacDonald and the WA Advisory Committee in working with Philanthropy Australia to produce this edition.

We hope you enjoy it.



Bruce Bonyhady AM, President
Philanthropy Australia

Deborah Seifert, CEO
Philanthropy Australia

Giving in the West

By **John Poynton AM**, Chairman Giving West

There's no doubt that the landscape has changed since a group of West Australians got together in late 2008 to talk about philanthropy. The world has yet to recover from the worst financial shock since the 1930s Depression, China's growing geopolitical importance continues to mirror its economic performance and our State's mineral riches have created huge personal fortunes.

But then, as now, the same questions remain. How do we encourage a giving ethos? How do we increase the 'size of the pie'? How do we help grant recipients to be more effective?

The discussions held three years ago led initially to a research project conducted by The University of Western Australia, which was generously funded by Lotterywest. The resulting landmark report 'A Rising Tide' confirmed our feeling that so much more could be done and as a result, Giving West was born in late 2010.

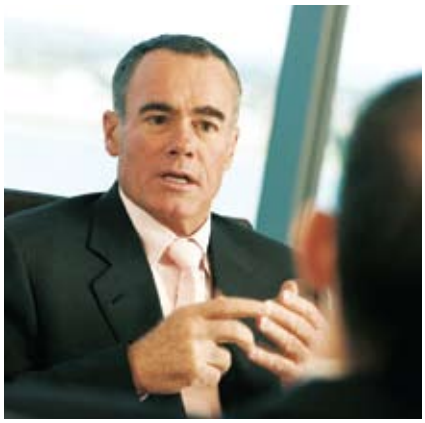
Just over a year later, we have a strong board, an excellent CEO in Kevin MacDonald and broad support from many quarters. The newly appointed Governor of Western Australia Malcolm McCusker AC CVO QC and his wife Tonya (who sits on the Giving West board) have been high profile advocates of our mission. Mr McCusker, a passionate long term philanthropist, recently awarded the inaugural Governor's Award for Philanthropy to David Flanagan of Atlas Iron, who also sits on our board.

"I am pleased with progress made through Giving West hosting 25 separate events in its short history, bringing together hundreds of people all keen to learn how to be more effective givers and receivers."

In the past, some donors have been reluctant to be acknowledged for fear of appearing to be smug and self serving. Fortunately there is a growing acceptance that drawing attention to acts of generosity does lead others to follow.

Andrew and Nicola Forrest have continued to promote giving and last year made donations totalling $50 million, the largest in WA's history.

As Chairman of Giving West, I am passionate about putting philanthropy on the agenda whenever and wherever possible. As such, I am pleased with progress made through Giving West hosting 25 separate events in its short history, bringing together hundreds of people all keen to learn how to be more effective givers and receivers. Whether it be a workshop on how to set up a PAF or a session on how a not-for-profit organisation can improve its 'pitch', there is a hunger for knowledge out



there. As a result of all this activity, we've received thousands of hits on our website, have many friends and followers on Facebook and Twitter and regularly feature in the mainstream media.

Our early goals remain the same but we are confident that there is a tangible shift occurring in the community's attitude towards philanthropy.

It is indeed ironic and somewhat disappointing that a 'tall poppy' syndrome still colours success. Just as some of our newly rich mining entrepreneurs are stepping up to the philanthropic challenge, it is unhelpful our Treasurer Wayne Swan castigates the rich as being greedy and undeserving of their wealth. Surely it is in everyone's collective interest to ensure we are a prosperous and successful society. The resulting tax revenue enables the funding of, amongst many other things, a fair social welfare structure. This prosperity also encourages, as we are beginning to see, the emergence of a new crop of philanthropists. ■

Malcolm and Tonya McCusker

Tonya McCusker, wife of the Governor of Western Australia, and Administrator of The McCusker Charitable Foundation, spoke to Louise Arkles about her family's experience in giving.

Please give us an overview of your giving.

The McCusker family has been giving for more than 30 years. For most of that time, our family gave quietly, usually anonymously. Due to work commitments, donations tended to be 'reactive'.

In 2007, the family decided to be a little more strategic about giving, and more proactive in ensuring that the donated funds were being used effectively. The McCusker Charitable Foundation was established, with four Trustees – Malcolm McCusker AC CVO QC (current Governor of Western Australia), his sister Carolyn McCusker, Justice James Edelman and myself, Tonya McCusker, as the Administrator.

Our website *www.mccuskercharitable.com.au* outlines our objectives and primary areas of focus and also clarifies the areas we do not support. Our primary objective is supporting medical research and we give priority to Western Australian based projects. However, we also fund community services, arts and environmental projects.

In establishing your foundation, did you look to others for inspiration?

Sir James McCusker (Malcolm's father) was certainly an inspiration who instilled in his son and daughter the importance of helping those in need.

We have been inspired by several philanthropists, Stan and Jean Perron, David and Sarah Flanagan, Andrew and Nicola Forrest and Sam and Leanne Walsh locally, and Warren Buffet and Bill Gates internationally, who have decided to speak out and promote the importance of philanthropy and set an example.

Just as inspirational, however, is the mother undertaking fundraising activities for her local school P&C and Rotarians fundraising to eradicate polio. No matter how small the amount raised, it all makes a difference to those in need. People must also remember that it is not just about donating one's treasure. As the saying goes, you should give of your, "Time, talent and treasure".

How do you decide where to give, and do you have a formal strategy?

We have a very lean organisation. Almost all requests come through our website which has an application form prescribing basic data we require for evaluation. As Administrator, I will either meet with the applicants or source additional information as required. Each application is evaluated by the four Trustees and a joint decision made.

We have no staff or volunteers, but I do have a large number of people I can call on for advice. For example, one research organisation asked for money for a new piece of equipment. I rang my sources at the WA Institute of Medical Research and Telethon Institute, and soon found out that Lotterywest was already funding the same equipment for another organisation. This resulted in them sharing the equipment – two sets were unnecessary.

Do you place much emphasis on measuring or evaluating the impact of your grants?

We certainly try to evaluate the impact, and require to be kept informed, not only so that we can be satisfied that the organisation is being well run, and collaborating with other such organisations (very important in medical research) but also so that we can decide whether funding should continue.

We ask grantees to provide a six monthly update on their projects and will undertake site visits where appropriate. However, having personally experienced the onerous requirements of acquitting government grants, we don't want to place too heavy a burden on these charities, many of whom are managing on a shoestring. So our reporting requirements are certainly less stringent than some corporate and government grants.

Do you see yourselves as part of a lively philanthropy community?

Absolutely. I believe there is a real awakening here in the West that giving is no longer a deeply guarded secret but something to be proud of. I am frequently in touch with staff at Lotterywest who have considerable information about the community sector and various projects requiring funding; connecting with other philanthropists is also helpful, as we can exchange ideas and information.

Last year's Australian of the Year, Simon McKeon, did much to publicise the importance of giving and the fact that those who give generously achieve a much higher level of happiness and sense of living a fulfilling and moral life. David Flanagan (Atlas Iron) does a wonderful job speaking out on how much pleasure he receives when he gives. Giving should be something that we are all proud to talk about.

Have privacy concerns impacted on the way you have chosen to go about your giving? Is the tall poppy syndrome alive and well in Australia?

There is still a degree of that old attitude by some; but I believe that it has diminished in recent times. People appreciate the importance of giving back to the community, and encouraging others to do so by example.

I know there are some donors who, when asked for a donation continually say, "No, I prefer to give privately". But Perth is a close knit community and people know who gives and who doesn't. Stories of high wealth individuals who make a moderate donation, and then expect the charity to work exhaustively to meet that donor's needs in return, are well known.

The McCusker children Nik (16), James (11) and Mary (3) and their mother Tonya (left) on a site visit at the Lions Eye Institute.

Have you succession planning, and who might be the future guardians of your philanthropic legacy?

Yes, we have of course given consideration to the important question of succession. We certainly wish to ensure that the Foundation's philanthropy continues without interruption. All our Trustees have law degrees and so it has not been necessary for us to call in advisors to develop a succession plan but we have attended a number of seminars on private ancillary funds and we have done our homework.

We hope that our children will develop an interest in giving back to the community. Our eldest boy Nik has been involved with some fundraising at school and spent time working in a school in Nepal. We take the younger children on site visits to the Lion's Eye Institute, Salvation Army and Rocky Bay. We do not believe in leaving a fortune to your children. Money does not buy happiness. Our hope is that our children each develop their own strong work ethic and carve out their own successful futures.

What legacy for WA would you like to see flow from the current economic boom, and what legacy would you like to leave as Governor and 'first lady'?

A more giving culture. A giving culture that is celebrated (but not bragged about), and that we can be proud of. A culture where you go to a party and the conversation is not about 'when my super yacht will be delivered' or 'how much I'm spending on a new car', and so on, but 'would you like to attend the event I am holding to raise money for Cystic Fibrosis research?'. There is so much need in the community and those who can, must do more for those who can't.

His Excellency Malcolm McCusker AC CVO QC, Governor of Western Australia, at The End of Polio Breakfast held by the Rotaract Club of Subiaco, with his wife Tonya McCusker (left) and a young rotarian working on polio eradication.

I'd love to see every business with at least one charity that it supports, and every director on a community board offering his or her time pro bono.

We need to realise that, despite its relative economic prosperity, WA still has needy people, homeless and disempowered people, as does the rest of Australia. The so called 'boom' has by-passed some.

But I am heartened to see the levels of giving, and the strengthening of community engagement, that we are witnessing now. It really is a dynamic time for philanthropy. ■

New systems needed... co-creating a brighter future

Western Australia expects 300 billion dollars of investment in the resources sector in the next 20+ years along with our population more than doubling. But there is such a focus on immediate resources growth that we are not balancing this economic growth by also looking at the broader social, environmental and cultural picture. By **Brodie McCulloch**, Founder and Managing Director, Social innovation in Western Australia.

We have entered a period of complex and unpredictable change.

How will this impact our already struggling social systems? We need to look strategically at how we plan, to involve all sectors and citizens in the creation of our shared future.

Innovative new models on both systemic and organisational levels need to be cultivated and nurtured by new ways of thinking and fresh new approaches. Social innovation in Western Australia (SiiWA) believes that one of the solutions is to support Social Entrepreneurs (entrepreneurs that are driven by a social purpose or mission) who have sound ideas for strong and financially sustainable projects to create change across systems, organisations and communities.

Social innovation in Western Australia (*www.siiwa.org*) was founded with the mission to facilitate the co-creation of resilient Western Australian communities through innovation, partnership and collaboration. This is achieved by supporting entrepreneurs, communities and business to deliver social good through innovation.

Sounds great but what does this look like?

SiiWA's first big project, in partnership with Stockland (a property management group) saw the opening of Spacecubed, a 550sqm 'Co-working, Collaboration and Innovation' space on the ground floor of 45 St Georges Terrace in the Perth CBD.

Spacecubed (*www.spacecubed.org*) has been designed to facilitate a new community of changemakers. The space provides office and meeting space for 70 organisations at any one time but intends to work with a broader community of 500 organisations fostering a remarkable community mix of 1/3rd social and environmental entrepreneurs, 1/3rd technology and creative startups and 1/3rd government and corporate innovation projects.

Brodie McCulloch presenting at Spacecubed.

This partnerships allows for Stockland's staff to volunteer in social enterprises or start-up social ventures, instead of the traditional low impact 'fence-painting' during their volunteering time. Once Spacecubed incubated ventures grow, Stockland seek to support them into other retail and commercial property to assist expansion in the open market.

Creating wrap-around support for organisations and individuals coming through Spacecubed is a key priority, and part of this ecosystem of support is funding and finance. Accessing funding when you're a large NFP is hard…accessing funding when you're a small start-up social venture is really tough! Government funding is rare, and funding through other NFPs can be difficult as often these organisations' cultures and systems do not marry with the needs and expectations of Social Entrepreneurs.

This leaves corporates, philanthropists/investors and earned revenue to fund social enterprise operations, all of which provide options for diverse and interesting business models. It is crucial to support these social enterprises through their first 24 months as their model is solidified – this is where I believe philanthropists and early stage investors can play a vital role in providing proof-of-concept funding and finance, to give an idea with potential high impact a real chance to form and thrive.

To meet the challenges of the next 30 years we need big, bold thinking and we need to support the mavericks who have the passion to execute innovative ideas and create new sustainable systems. ■

www.siiwa.org

Brodie McCulloch can be contacted on 0413 556 400.

SiiWA
Social innovation in Western Australia

spacecubed
CO-WORKING, COLLABORATION AND INNOVATION

Cultural change for a WA giving legacy

By **Kevin MacDonald**, CEO Giving West.

February 7 2012 marked the bicentenary of the birth of Charles Dickens, well before the foundation of the Swan River Colony in Western Australia. A prolific author, Dickens was also a philanthropist, founding a home for disadvantaged women. He was most famous for showcasing the struggles and social inequality in England, based on his own experience working in strenuous and often cruel working conditions. This led him to highlight the need for socio-economic reform, especially focusing on arduous labour conditions.

One of Dickens' better known stories, A Christmas Carol, was also influenced by his personal experience. The name Scrooge has become synonymous with miserliness and misanthropy. The conversion and redemption of Dickens' Scrooge from a cold-hearted, greedy man to one who discovers the joys of giving has become a defining tale.

In the twenty first century similar personal discoveries of the benefits of giving, of alleviating poverty, of changing the lot of the disadvantaged, are all commonly acknowledged. The pleasure and satisfaction that giving brings, and its links to wellbeing, is well known.

Australians are considered generous, ranked third out of 128 countries listed in the World Giving Index recently published by Charities Aid Foundation (the USA is first and Ireland second). The World Giving Index is based on three giving behaviours: donating money, volunteering time and helping a stranger. Based on responses, 71 per cent of Australians give money; 36 per cent volunteer time and 68 per cent help a stranger, which globally is the most common giving behaviour.

Whilst nature and financial markets play havoc with global economies and societies, WA is experiencing a great period of sustained economic growth, high employment and prosperity. But is it benefiting all West Australians? What will the lasting legacy be from this 'boom'? Tall buildings and large holes in the earth, or will it be something of greater substance?

The underlying belief that 'corporate philanthropy is only about big business giving big dollars' can't be further from the truth. Certainly big businesses benefiting from the State's buoyant economy should be at the forefront of fostering community investment in the State. So too should WA leaders be at the forefront in creating a culture of giving, leading by example to create a legacy for this State.

Key shifts in giving behaviour and community services are based on demographic and economic factors. WA business and community leaders, corporations and individuals are putting giving on the agenda in a bigger way than it has ever been before. Advocacy, funds, time and personal effort are increasing, developing a giving culture in WA – there has been a subtle but discernible shift – but there is more to do to effect real and long lasting change.

Western Australians have been generously donating money to many causes for many years but much of that generosity has been spontaneous or event driven. We should use the opportunity of the State's prosperity to build on the existing culture of giving, but in a regular and planned way to inculcate a cultural shift.

There have been signs of this cultural shift in Western Australia that clearly demonstrate longer and louder conversations about giving. There are many examples of individuals and families formulating and actioning giving through trusts, foundations and other vehicles. Employers continue to expand discussions that encourage employees to embrace the concepts of workplace giving and volunteering. Not only is this beneficial to organisations and people who are the recipients of this help but shows leadership in the WA community.

However, many people still misunderstand the term philanthropy, as if it relates purely to giving money or is only for the wealthy. Philanthropy is more than that: it is the giving of time, treasure and talent, regardless of your financial situation; having the courage to commit either financially or otherwise to a cause through personal endeavour or avocations.

Building on the leadership already shown WA can create a philanthropic landscape as rich as the physical one, which will lead to long lasting cultural change and a long term legacy for the future of the State and its people. ■

GivingWest

Lotterywest – leading in innovative grantmaking

Lotterywest is a grantmaker valued by community organisations for taking 'leaps of faith' and 'making dreams come true'. Relationship-building and innovation have been at the core of its approach since its inception and are key to meeting future challenges. **Gina Zanotti**, Grants Marketing Manager, explains.

"A rare combination of leadership and capacity to deliver" is how Lynda Dorrington, Executive Director of FORM, describes Lotterywest and its support of Yiwarra Kuju: The Canning Stock Route Exhibition. "Where others may have seen only the challenges of such a project, Lotterywest saw an opportunity to tell the story of the Stock Route through the vision of Aboriginal elders and young people".

This is the kind of feedback which gives Lotterywest the confidence that its flexible and responsive approach to grantmaking is working – both in the strength of the relationships it's building and in the outcomes of grants to more than 1200 different community organisations annually.

Funding case study – The Canning Stock Route Project

FORM is an independent not-for-profit organisation dedicated to advocating for, and developing, creativity in Western Australia. In The Canning Stock Route Project they've achieved something epic; an Indigenous art project that's gained international recognition and engaged a new generation in cultural learning.

"The difference between Lotterywest and any other partner that we deal with is that Lotterywest sees the dream, and helps you in a practical manner that realises that dream."

The 'challenge' presented to Lotterywest by FORM was a request to support travel back to country for a series of creative workshops. The aim of the workshops was to develop paintings and artefacts and engage young family members in cultural learning. The travel and activity was to be recorded through multimedia. The workshops involved nine Aboriginal Art Centres, host communities, cultural leaders and young people over a 1,300km route between Halls Creek and Wiluna.

Lynda elaborates: "Right at the beginning, the thought of travelling such a distance in rough country, finding people in the communities who were willing to engage, and simply the length of time required, all meant we needed big thinking and a willingness to take risks". We'd spent a year canvassing potential partners before Lotterywest opened the doors to us. The difference between Lotterywest and any other partner that we deal with is that Lotterywest sees the dream, and helps you in a practical manner that realises that dream."

Members of the Tjurkurba Artists gather on the Canning Stock Route.

The dream in this instance was to connect young people to their land and stories, to honour their elders, record and share the vibrancy of desert life and build the artistic and curatorial skills of Aboriginal people. This extraordinary cultural repository will be accessible to the families of all those involved, creating a genuine legacy for the Project stakeholders in remote areas.

Lynda also values the support Lotterywest gave in bringing the Stock Route artists to Perth when the project was showcased as part of Perth's recent Commonwealth Heads of Government (CHOGM) meeting.

"It really wouldn't have been worth having the exhibition without the artists being present. This is their project, their land and they needed to see the exhibition safely delivered into Western Australia. Lotterywest funded the artists' travel costs and that's a cost that others often won't touch."

Innovative grantmaking

Unlike other lotteries in Australia, or most lotteries globally, the Lotterywest Board has responsibility for making grants directly to community and charitable groups. The model for most other lotteries sees funds channelled direct to government as a form of taxation or to another distributing body. Final approval for Lotterywest grants rests with the Minister. In Western Australia the Premier has Ministerial responsibility for Lotterywest. Last financial year, Lotterywest's grants to community and charitable groups amounted to $114 million.

"We are very grateful for the freedom and responsibility that the government has entrusted in Lotterywest over many years now. That trust has enabled us to make decisions that, because of our size and reach, ultimately have had a significant effect on the shape of the not-for-profit sector in Western Australia," says Lotterywest Board Chairman, John Atkins.

The Lotterywest Board has championed the kind of lateral grantmaking that saw the Canning Stock Route Project receive crucial funding. Mr Atkins, appointed Chairman in 2010, sees his role as building on a tradition dating back to the 1930s.

"Lotterywest has always seen its role as more than just a distributor of funds. Records from Lotteries Commission Board meetings show that, even in its infancy, the organisation never shied away from initiating and supporting innovative approaches to social issues of the day."

"The resulting streamlined systems allow staff to devote more time to community development, bringing efficiencies to reporting and analysis, grant assessment and approval, application processing and payment."

Long standing Lotterywest CEO Jan Stewart agrees. "Applicants look to our organisation for leadership and advice in the development of visionary projects, such as The Canning Stock Route Exhibition. It's a reputation that places demands on our staff and challenges us to live up to our relationship model of grantmaking." She goes on to explain that the relationship model is central to Lotterywest remaining connected to grant customers. Although the organisation has built on this approach for many years, it has only recently been defined as a formal part of Lotterywest's strategic plan and approach to business with its grant customers.

All rural regions of WA and the metropolitan area are served by small teams, responsible for developing local relationships with individuals, community groups, State Government and Local Government agencies. This gives our staff a broad overview of the needs of the local communities. We know that the best work and outcomes come from personal relationships with others working in that area or region.

A young boy traces a representation of the Canning Stock Route with his fingers at the Yiwarra Kuju Exhibition.

As well as their local region, staff are also assigned to specialist grant areas, for example children and family services, disability, aged care, heritage and conservation, and they work to develop understanding and relationships with organisations working in these areas.

Merlin grants management system

Recently Lotterywest took on a huge task: to consolidate all the different software it used for business operations and customer relations through a single enterprise software system. The result for the grants team is a new grants management tool, known in-house as 'Merlin'. The resulting streamlined systems allow staff to devote more time to community development. Integrated with other Lotterywest systems, 'Merlin' has brought efficiencies to reporting and analysis, grant assessment and approval, application processing and payment.

Most importantly the project included a revision of the Lotterywest website resulting in clearer information for grant seekers and the capacity to receive applications online. Now, more than 70 per cent of grant applications are submitted online, reducing administrative time for Lotterywest and making it easier for community organisations.

Lotterywest encourages all grant applicants to make personal contact with the grants team before making an application, and actively encourages innovation. The new website is designed to be welcoming and to encourage potential applicants not to limit their thinking.

This approach has meant a change in thinking for our customers and our grants staff. Instead of our customers asking 'what are

we eligible for?' and tailoring their applications accordingly, we want them to think 'what do we want to achieve?' and 'what do we need to do that?' and then talk to us about what they really need.

Looking forward

With the new technology and relationship model in place, Lotterywest has a unique overview of the Western Australian community sector. Recently the Board and senior staff came together to reflect on the organisation's 'next stage' in grantmaking, including how to evaluate the effectiveness of our grantmaking; what challenges lie on the horizon, and Lotterywest's response as a community leader.

Interconnected issues facing our community include homelessness; substance abuse; domestic and child abuse; mental illness, loneliness and the growing sense of alienation of many from any kind of community connection; the deeply entrenched issues for our Aboriginal communities and the needs of our migrant and refugee communities.

"Instead of our customers asking 'what are we eligible for?' and tailoring their applications accordingly, we want them to think 'what do we want to achieve?'"

In addition, issues for children, in particular development of young children, our environment and many other growing social issues will challenge our capacity to work with community sector colleagues, and will require that we critically and constantly review how we operate.

Lotterywest will need to work with all key stakeholders in partnership to help find new ways of responding to these issues, accepting that there are no 'quick fixes'. However, the Board and staff are convinced that the core principles and values on which Lotterywest has built its approach to community responsibility are fundamentally right.

Perhaps the last word on Lotterywest and its grantmaking future should go to Curtis, a 22 year old Martu man and winner of two Western Australian Citizen of the Year awards. Curtis is studying screen production and is an ambassador for the Canning Stock Route Project.

"Yes, I make films about the art and lives of Western Desert people but I'm grateful to everyone who is supporting me in telling these stories. The good that came of this project… the young ones are painting now. I keep telling everyone – it's just the beginning." ■

lotterywest

The Fogarty Foundation

By **Annie Fogarty**, Executive Chair, Fogarty Foundation.

Brett and Annie Fogarty established the Fogarty Foundation in 2000, creating opportunities for people to achieve their potential and to build stronger communities in Western Australia. They have chosen to focus their time, expertise and funds on education as the most effective avenue of providing equality of opportunity for everyone.

"The philanthropic and business sectors are recognising the need for greater involvement, if Australia is to have an effective education system that delivers the future we all aspire to."

Education in Australia is often seen as an area for which the government and parents should be responsible. However education is a broad and complex area and the philanthropic and business sectors are recognising the need for greater involvement, if Australia is to have an effective education system that delivers the future we all aspire to.

12 program partners

The Fogarty Foundation presently partners twelve different programs, all with an education focus over a wide spectrum of the community. Many are within key institutes of education – schools, colleges and universities, but others reach out into the community working with not-for-profit organisations. The programs are all part of the 'education highway', addressing issues from early childhood learning, parent engagement, developing the leadership abilities of young people, and working with educators to support and build the capacity of teachers and school leaders.

A key factor of all of the programs is that they have benefits that go beyond the immediate, that they can be effective in a range of areas and will have long lasting positive change in the community, creating a ripple effect of social change.

Annie Fogarty (centre) discussing Fogarty EDvance with Keith Newton, Director of Learning Programs and Megan Enders, Program Director.

UWA Scholarship Program

As well as supporting organisations with specific programs, a key attribute of the Fogarty Foundation is identifying needs within the community and initiating new projects with tangible results. One of the first of these initiatives was the UWA Fogarty Foundation Undergraduate Scholarship Program, which was established to support Western Australia's brightest and most committed students to study at university. The scholarships include a Leadership Program which provides the opportunity for the scholars to learn from today's leaders and be given a broader insight into the community and how they can contribute. While this program is building strong leaders for the future, many of the scholars are already involved in community and philanthropic work in Australia and globally.

One of the most significant concerns the Fogarty Foundation has identified is the need for improved educational outcomes for children in low socio-economic areas. Children in these areas often face a range of challenges that can negatively impact on their education. Many students attending these schools have achievement levels below the national average and these levels have stayed persistently low despite numerous improvement measures and targeted interventions over many years.

Fogarty EDvance – advancing educational opportunities

Fogarty EDvance is a new approach to this challenge. Working across disciplines and including educationalists, business consultants and universities, Fogarty EDvance will be working to support and build the capacity of school leadership teams in low socio-economic areas.

Using management practices of successful businesses, the program will provide course work and mentoring, build strong peer support groups, and support principals and their teams to bring the resources of the community into their schools.

This is a unique initiative to bring the education, government, business and not-for-profit sectors together, and hopefully this model will be able to be used in other areas as well. The program has received initial support from people and organisations throughout all of these sectors, who recognise the importance of quality education for all and the benefits this brings to our whole society. Many also see the potential Fogarty EDvance has to enhance the participation and lives of the families involved, improve the delivery of other services in disadvantaged areas through the school and strengthen the cohesion of these communities. ■

Collective giving: launching Impact100

How collective giving, a growing phenomenon in the US, can help inform philanthropy, potentially enriching the lives of all Australians – and how WA is set to make a big impact. By **James Boyd**, WA Manager Artsupport Australia.

All philanthropists have one thing in common – they want to make a difference. The only way to ensure a donation has impact is by knowing what you want to achieve and how best to achieve it. But, as many philanthropists and would-be philanthropists have discovered, finding good investments is often easier said than done. In the US, collective giving through Giving Circles is becoming increasingly popular, and their ability to offer significant education to donors is making the search for impact much less of a guessing game.

A cross between a book club and an investment group, Giving Circles offer an engaged, collaborative approach to philanthropy. In a Giving Circle, donors place their charitable dollars into a pooled fund, and decide together which charities to support. The appeal is simple: involvement in a social and rewarding environment where donors see the benefits of a group gift above and beyond what they could achieve alone.

Giving Circles also offer exciting educational benefits. Research on 600 Giving Circles in the US tells us that 65 per cent of circles offer donors workshops and speakers on community issues; 56 per cent offer speakers on philanthropy and giving; and

Young people from Burringurrah (Gascoyne region) Western Australia taking part in Country Arts WA's 'Out There' Regional Youth Arts Leadership Program. Photographer: Wendy Carmichael (Courtesy of Country Arts WA).

The inaugural committee of Impact100 WA (left to right): James Boyd, Simone Eley, Loretta MacDonald, Rory Thomson (seated), Andrew Johnson, Paul Chamberlain, Sophie Chamberlain (seated), Simon Bedbrook and Iris Koomstra.

27 per cent offer donors how-to workshops on proposal evaluation and understanding non-profit budgets (Bearman: 2007).

"A cross between a book club and an investment group, Giving Circles offer an engaged, collaborative approach to philanthropy."

Impact100 is one of the successful US models of Giving Circles, which began in 2001 in Cincinnati. Their rationale is simple: 100 people give $1000 each annually; they pool the funds and then make high impact grants to local community organisations. Educational activities are an important key to their success.

Excitingly, Impact100 is about to be launched in Western Australia – a first in Australia – and promises to offer an educational stepping stone to enriched personal philanthropy.

The two founders of Impact100 WA, Simon Bedbrook and Sophie Chamberlain, come from families with a strong history of philanthropy. Simon Bedbrook, inaugural chairman of Impact100 WA, found the concept instantly appealing. "Working in the financial services sector, I see a growing interest in the area of philanthropy," he says. "I'm involved in our own family charitable trust and get a huge kick out of it. A growing number of West Australians have the capacity to be involved in philanthropy and Impact100 WA will give many of them an opportunity to test the water, introduce them to non-profits to explore what inspires them, and learn about the needs of the community."

Sophie Chamberlain says, "It's also important to increase people's involvement in effective and engaged philanthropy,

Ezekiel Peumorra takes part in the 'Mobile Moments' project, part of the Boab Festival's MarshART 2011, held in Derby. MarshART was established by DADAA in 2007, in collaboration with local community groups in the West Kimberley. MarshART is supported by the Collier Foundation. ('Mobile Moments' Artsworker: Sarah Nelson; Photographer: Matt Scurfield).

and make that experience accessible to many – so they can feel firsthand how rewarding it is. The minimum donation to Impact100 WA will be $1000, so should be affordable to most." Subject to successful recruitment, Impact100 WA intends to make at least one $100,000 high impact grant to a Western Australian non-profit organisation each year.

Sophie explains, "Making fewer, big grants will be our greatest strength. Our members will see the impact and we are also able to keep the costs of administration and reporting to a minimum". Simon Bedbrook adds, "So far, I've been surprised how easily it came together. Some people not fired up in the past are enjoying this idea."

"The minimum donation to Impact100 WA will be $1000, so should be affordable to most."

Impact100 WA will be a sub-fund of the Australian Communities Foundation (ACF). This will allow the group to offer a tax deduction to donors and reduce the burden of administration on the volunteer committee. The ACF charges 2 per cent of the value of the fund, allowing the vast proportion of donations to go straight into the community.

"We want Impact100 WA to offer lots of opportunity to learn about the community sector," Sophie explains. "We hope this will develop highly educated donors, new major donors, advocates for charities and, ultimately, a culture of giving in WA."

Indeed, US research suggests exciting spin-off effects of Giving Circles. 76 per cent of circle donors reported that their awareness of community problems had increased (Eikenberry and Bearman: 2009); 35 per cent of donors contribute additional money to charities met through their involvement; 65 per cent end up volunteering; 32 per cent offer pro bono support; and nearly half of participants end up on non-profit boards (Bearman: 2007).

More people in Australia would be philanthropic if they felt better informed of community needs and knew how to have impact. Impact100 WA is sure to catch on and, through a modest donation, will open the door for many to the enriching world of philanthropy. ■

www.impact100wa.org.au

Artsupport Australia is the Commonwealth Government's adviser to philanthropists on supporting arts, culture and related Indigenous projects in Australia. James Boyd also mentors Giving Circle start-ups. Tel: 08 6488 7339.

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Australian Communities Foundation – *www.communityfoundation.org.au/sub-funds*

Community investment – good for business, good for all…

By **Trisha Comerford,** Manager – Community Investment, Rio Tinto.

RioTinto

At Rio Tinto our approach to investing in the community is simple – to make a positive contribution and a lasting difference in both the local area around our many operations, as well as in the broader state, regional and territory contexts. We know it's not all about digging dirt out of the ground and it's now become part of our DNA.

We also know that we can't do all this by ourselves, which is why we partner with others who share our values and goals, particularly in statewide significant projects that inspire long term solutions in education, health, environment and culture.

In Western Australia, we address these via the Rio Tinto WA Future Fund, which is our statewide community investment vehicle.

"Our employees are proud of the work that we do and contribute widely. Our community volunteering program saw 6,500 employees participate in 2011, raising over $515,000 for 80 WA organisations."

We are currently in a state of unprecedented growth in Western Australia. We know growth to be exciting, but with it comes responsibility to our employees, our shareholders and our other stakeholders to make sure that as we grow, we are consultative about our plans and activities, we address sustainability matters and we add value. In short, we are determined that our growth will have a positive impact on host communities and will contribute to *their* growth.

We now have more than 10,500 people permanently employed in our Western Australian iron ore business alone. That figure will rise by about 50 per cent over the next five years. Overall growth will require, for example, access to educated local workforces, skilled and professional contracting services, engaged public and civil sectors, and a workable regulatory framework.

Our business engagement model requires us to address all stakeholders. An integral component is to invest resources to make 'better' communities, both those in the Pilbara in which our employees live and work, as well as those from which our employees may fly to the Pilbara on a regular basis.

One of the great challenges of community investment is that there is no rule book. There are no 'rights' and 'wrongs' about how much, where or how often to invest; which is a salient learning from each of more than 350 community health, education, cultural and environmental programs we invested in during 2011. But one thing has become clear to us – support partnerships or sponsorships that not only have a clear community benefit, but also have alignment with core business.

We would recommend that businesses look at developing partnerships rather than just giving donations. This means investing the time and effort in building shared objectives and outcomes and ensuring there are suitable resources from each partner to service the project and the relationship.

Our employees are proud of the work that we do and contribute widely. Our community volunteering program saw 6,500 employees participate in 2011, raising over $515,000 for 80 WA organisations.

Some of Rio Tinto's community investment successes include:

A $4.8 million partnership with the Royal Flying Doctor Service, which launched the Rio Tinto Life Flight jet in 2009. This partnership was a response to a pressing need for better health emergency services in remote areas, particularly in the Kimberley and Pilbara.

A foundation partner of the State Library of WA's Better Beginnings Family Literacy program. This program has already reached over 40,000 families and is being expanded with the assistance of the WA Government. Research shows the program is modifying behaviours and getting people to recognise the importance of sharing books with children.

A new $8 million environmental discovery facility in Kings Park – Rio Tinto Naturescape. It's an innovative partnership between Rio Tinto, the Botanic Garden and Parks Authority, Lotterywest and the Water Corporation, providing 6 hectares of inner-city bush where children can have fun and learn about the environment. (See our beautful photograph on the front cover.)

Rio Tinto has been around in Western Australia for over 40 years and will be here for a long time to come. We know that we take a lot out of Western Australia – literally – and we want to 'put back' in a meaningful manner: it is the right thing to do. In the long term; it's good for employees, good for communities and good for business. ■

Giving smiles back to the East Kimberley

Dr John Owen AM is a highly respected orthodontist with a practice in Midland. He and his wife Jan Owen, an experienced dental educator, nurse and homeopath, are the founders of the Kimberley Dental Team, which has given extraordinary service to remote rural communities in Western Australia's East Kimberley. John was appointed a Member of the Order of Australia in 2010 for 'service to the specialty of orthodontics'. He spoke with **Tanya Kay** about their work and giving in-kind.

How did the Kimberley Dental Team come about?

When Doreen Green, a respected Jaru woman and teacher at Halls Creek District High School, invited Madjitil Moorna choir (which Jan is a part of) to sing Aboriginal songs with the school's children, we jumped at the opportunity to also take our dental skills to the country. No dental therapy service had been to the Halls Creek community for several years.

We found that 38 per cent of the kids in the school were in need of urgent care. They were in constant pain, which affected their ability to concentrate, sleep and eat normally. We could see that down the track this neglect could manifest as cardiac disease, diabetes, learning difficulties and substance abuse.

It was clear the government needed some help. Dental funding had not kept up with demand. Building clinics in regional centres and then expecting patients to travel was not working. Dental education was non-existent. In fact, a toothbrush cost $7 and there were three brushes for sale in one of the communities.

How did you go about it?

We provided the Minister for Health with the statistics of screenings conducted during the choir's visit. As a result we were granted access to the underutilised government facilities in Halls Creek.

Twice a year we fly six to eight volunteer dental personnel to Halls Creek and accommodate them for a minimum of a week. Current figures demonstrate that as a team we are twice as productive for half the cost of a remote salaried dental service. Dentists of all levels of experience apply for the privilege to mentor younger practitioners. All the UWA students we have had so far have volunteered again and will eventually be able to lead their own teams because of our capacity-building approach.

We base the team in Halls Creek and radiate out, mostly by helicopter, to remote communities to give everyone access to the service. We have also set up two self-contained remote treatment areas, and rely heavily on mobile equipment. We distribute toothbrush packs wherever we go and have been able to bring the average cost of a toothbrush down to 20c.

We only go where we've been invited by the community, health clinic or school. There are approximately 120 remote communities in the Kimberley, of which we are involved with 12. We've been going back year on year since 2009 and have cultivated mutual respect.

How have you structured this giving-in-kind initiative?

We established The Kimberley Dental Team Inc, a not-for-profit incorporated company of which we are the directors. We don't charge for the service, we fund it through the Owen Family Trust. We have continued to attract some funding and support from organisations such as HTC Sirona, Skywest, The McCusker Charitable Foundation, Commonwealth Bank of Australia, National Dental Foundation and Dental Health Services. UWA now provides grants to enable dental students to participate.

We simply have not had the time, nor the fundraising experience, to engage in submission writing. We know we will need to tap into this avenue, as funding is currently reliant on income from our businesses, which means we have to work.

Dodnum medical clinic at Gibb River with Tippy under the chair keeping watch.

What is your vision for the future?

We are now getting clear real results from KDT's East Kimberley model. It can easily be replicated throughout WA and Australia given sufficient funding. We would also like to create the infrastructure to better tap into the pool of experienced dental nomads travelling around Australia.

If we can show that we are not needed anymore, that would be the best outcome, but at this point we still have 108 communities in the Kimberley region to visit. ■

www.kimberleydentalteam.com

Is there value in understanding values?

The traditional assumption is that giving and philanthropy are driven by a very narrow set of 'moral' based values. However, this over-simplified view dramatically limits our understanding of the relationship between personal values and giving, as relatively few people prioritise what might be considered 'moral' values above others. A better understanding can come from aligning personal values with causes and appeals, as this is likely to increase overall giving and the long term value of giving relationships. **Timothy Daly**, **Julie Lee** and **Geoff Soutar**, from the University of Western Australia Business School, shed light on the findings of a research project which seeks to understand what motivates giving.

The Values Project, led by Professor Julie Lee at the UWA CSI, involves an international team of scholars who are working toward refining the theory and measurement of personal values, with the goal of better understanding their impact on behaviour.

Initial work was funded by an Australian Research Council Discovery Grant (with Professors Soutar at UWA, Shalom Schwartz from Hebrew University and Jordan Louviere from the University of Technology, Sydney).

We are currently working with Giving West to develop a comprehensive project aimed at understanding and promoting more giving in the Western Australian community.

What are personal values?

Simply speaking, personal values are a range of motivational goals that indicate what is important to us in our lives, across situations and contexts. They influence our aspirations, perceptions, attitudes and behaviours; from the mundane, such as interrupting people in conversations, to important life decisions, such as career choices.

Personal values also impact on our view of the world and how the world ought to be. We tend to see our own values as the 'best' or 'right' way to be and believe others should have the opportunity to attain these important values. As such, our personal values impact on the types of charitable causes that are likely to resonate with us, as well as the appeals that are likely to motivate us to act.

A lot is known about the content and structure of personal values (see Schwartz, 2010). For instance, a systematic set of basic personal values has been found in almost all societies, evidenced by over 200 studies in more than 80 countries.

These values and the circular structure that captures their underlying motivations can be seen in the diagram opposite, in which neighbouring values share similar motivations and opposing values have conflicting motivations. Consequently, it is easy to pursue achievement and power values simultaneously, as they share a similar motivation (i.e. social superiority). However, it is difficult to pursue self-enhancement values and self-transcendent values simultaneously, as seeking personal success is likely to obstruct actions that help others.

Schwartz's values system[1]

Our research group has been collaborating with leading scholars around the world (including Professor Shalom Schwartz) to better understand personal values and their impact on attitudes and behaviours, including giving.

We are working on refinements to this values system and the way in which values combine. For instance, we know most people fall into one of four different value groups that have very different attitudes and behaviours.[2] These groups include people who are most motivated by different values:

1. **Self-Transcendence** such as Universalism ('moral' values}; or
2. **Openness to Change** such as Self-Direction and Stimulation; or
3. **Self-Enhancement** such as Achievement and Power; or
4. **Conservation** such as Conformity, Tradition and Benevolence.

While the self-transcendence group may be considered to have 'moral' values and, on average, give more to a range of causes, there are philanthropists in each of the groups. Indeed, many philanthropists are very successful business people, who value personal success and work hard to achieve wealth and a position in society. As these are clearly self-enhancement values (which oppose the commonly accepted 'moral' values), it is interesting to think about whether they moved toward a completely different set of values, or whether they are looking for different, perhaps more fulfilling, ways to promote the values they believe are important in society.

Why do personal values matter to philanthropy?

As already mentioned, there are people in our society who are motivated to place others' needs before their own (the self-transcendence group). These people place a greater importance on the welfare of others than on their own personal achievements. This does not

mean they don't want to achieve anything; they are often driven in their careers, but with the aim of helping the less fortunate in society, rather than achieving status or social standing. They are generally more open to giving. They see a greater need and feel greater responsibility because they believe the world should be a place in which those who are weaker are looked after by the strong. They are fulfilling their personal values by making the world a better place, according to their own standards.

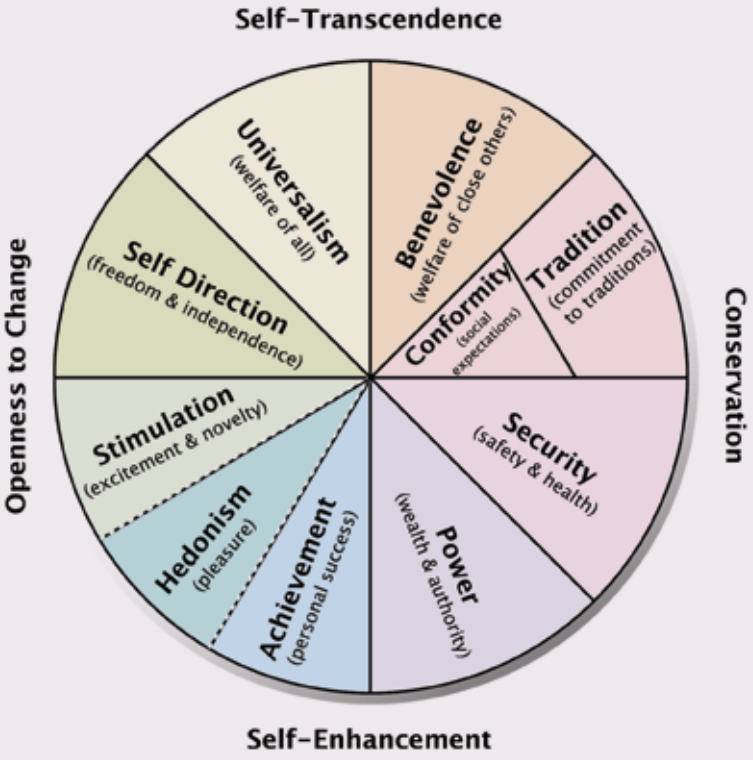
However, anyone can be motivated to give generously; particularly to causes that are aligned with their values or life goals. Our natural tendency to see our own values as the 'right' way makes us more aware of basic problems associated with attaining those values and, hence, we see a greater need to help others reach that goal.

As we have a finite capacity for giving it is important to think about how well charitable causes align with our values or life goals. For instance, education and job creation causes align most strongly with achievement values. Consequently, an achievement oriented person will be more open to give towards these types of causes, and more likely to gain personal satisfaction and wellbeing out of that giving.

In the long run, if we can match the alignment of personal values with causes, we will provide benefits to donors, through greater satisfaction and loyalty, and to the charity, through greater lifetime donor value.

Values can be also be used to maximise the effectiveness of different charitable appeals to different groups of people. With appropriate messages, we can motivate people from across values groups to help with the same cause. For instance, the Self-Enhancement values of Achievement and Power share a motivation for status according to social standards. For these people, appeals that offer the giver a chance to attain social recognition provide an opportunity to help a worthy cause and, at the same time, help their own value attainment. However, this appeal would be poorly aligned for the Conservation group, as they tend to avoid public recognition.

Schwartz's values system



Neighbouring values share similar motivations.

Different appeals offer strong alignment with each group, using the example of raising money to fund a named scholarship for an underprivileged youth:

- **Self-Transcendence**. Emphasise it as an opportunity to help a local community member get a more equitable chance at education, bettering society as a whole.
- **Openness to Change**. Emphasise it as a new or novel opportunity to get involved in something exciting and different as a worthy use of their resources.
- **Self-Enhancement**. Emphasise the status attached to a named scholarship, giving an opportunity for social recognition.
- **Conservation**. Emphasise the chance to give back to the institution that helped get them started, demonstrating loyalty and responsibility to their alma mater.

How can this understanding benefit philanthropy?

With more and more worthy charitable causes asking for money, a better understanding of personal values can help donors make more effective long term choices. Research tells us that the more often we are asked, the more money we give. However, this outcome leads to inefficiencies, as charities spend more on fundraising. A stronger alignment between the donor's personal values and the cause should benefit both sides of the equation. Donors more satisfied with their giving and charities more efficient in their fund raising. ■

For more information about the values project contact:

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1. See Schwartz, 1992, for a detailed explanation of the shared motivation between each pair of adjacent values in the circle as well as for an explication of the motivational conflicts between values.
2. Interestingly, it is the proportion of people in each value group that differs across countries, rather than a consensus around any particular value.

Reflections for the next generation of givers

By **Martin Copley**, Trustee of the Spinifex Trust and Chair of the Australian Wildlife Conservancy.

Western Australia today is unquestionably a place where personal wealth is being created at a dazzling rate and charitable giving is starting to follow in lock-step. Along with new wealth, the preconditions for a growing philanthropy sector are here: education, awareness and opportunity. What is more there are some excellent role models who are prepared to stand up and be counted.

So how do you start? Should you begin now when time poor and still building an asset base or should you wait until you have sold that valuable business? I don't think there is any right answer. Charities would love your support today but if you are driving a business it is usually difficult to take time out to get involved with philanthropy.

I didn't start getting involved in philanthropy until I turned 50. I thought I hadn't got the time to think of much else before then. All I can say now is that philanthropy is a bug that gets you, and I wish I had started at half that age – even in a small way.

If you are lucky enough to come into an inheritance then look around and see what areas of need strike a chord. Everyone should be able to find an area that really excites them. There is so much that is in desperate need of your support and the sooner you start building your experience in making grants the better. An early education in effective giving will stand you in good stead, as your grants and their impact grow over time. It can be easy to waste time and money with ineffective donations. You have to learn to see through the glossy brochures and sexy marketing and look for measurable results.

Starting young is a real advantage and in Perth there is now a group called Impact100 WA for those who can afford to gift from $1000 a year. This is a new initiative aimed primarily at people in their thirties and forties and they are gathering donors to raise at least $100,000 each year for charity. The collective choosing of grant recipients enables these donors to experience the satisfaction of being involved in engaged philanthropy, knowing that their contribution becomes part of a transformational grant, with strong leadership and guidance, funding projects within local communities and improving quality of life.

Those who can afford it often seek professional assistance in analysing the, sometimes confusing, range of giving opportunities. Large foundations and some PAF's employ grant officers and form committees to help them decide how best to deploy their grant funds. There is a lot of help available from advisors, networks and membership bodies like Philanthropy Australia.

Martin Copley (right) and Leigh Whisson from the Australian Wildlife Conservancy releasing a collared Burrowing Bettong (also known as a Boodie) on Faure Island in Shark Bay.

"All I can say now is that philanthropy is a bug that gets you, and I wish I had started at half that age – even in a small way."

Should the environment be a sector that attracts you, as it does me, there is also an organisation called the Australian Environmental Grantmakers Network (AEGN) to help you bring rigour and discipline to the selection process. One of the benefits of joining a network is that it gives you the ability to stay in touch with, and discuss causes with, others who support the same issues.

The risk of investing in the 'wrong cause', (or perhaps the 'wrong' organisation in the right cause) may only become apparent when it is too late and the money is spent. You might kick yourself afterwards for not doing your homework and getting better results from a stronger organisation, or one better aligned with your intentions.

Make no mistake, philanthropy is a significant and growing business area, and just like the stock market you want to pick the winners. It is very gratifying when you get it right. You will not get a financial dividend, but you will get huge satisfaction from knowing your money has been well applied and has made a real difference.

So my advice is get your feet wet early and grow your experience. That will give you the best chance of making the biggest difference, whether in small sums or large. For me, philanthropy simply ticks all the boxes. ■

A passion for learning

A BHP scholarship at UWA's Business School put **James McClements** on the fast track to success, co-founding a private equity firm, Resource Capital Funds (RCF) in the USA in 1998. The firm manages more than two billion US dollars on behalf of endowments, charities and foundations exclusively within the mining sector. Six years ago he moved back to Perth as Managing Partner of RCF and has been instrumental in establishing, amongst other things, a Mining Leaders Scholarship Fund and the McClements Family Foundation. He spoke with **Tanya Kay**.

What cultural differences have you observed between philanthropy in the US and in Australia?

Giving in the US is more institutionalised around the process. There is a greater cultural acceptance of both the process of asking for donations and also the decision to be public about giving. The style of asking in the US is far more direct, donors are more receptive as they know the process and no one takes offence at that. The culture of the obligation to give is also imbedded much earlier.

I don't think West Australians are unwilling or unable to give, there is a generosity here. The issue is around causes that are historically perceived to be less charitable such as education. In the US educational and cultural institutions have always been considered private rather than public institutions. There is an attitude here about the responsibility of government and, as a result, a resistance to philanthropy being called to support those causes. Here we also tend to focus around a particular event or significant expenditure, such as a new building, rather than taking a longer term more structured view.

What is your view on privacy vs. visibility in giving?

In Australia there is a little bit of the tall poppy syndrome around naming rights. By being public about your giving, you are actually helping to create a culture of acceptance around promoting giving. In the US this is just not an issue. Name association with a donation is not perceived in a negative way – it is seen as aspirational.

There are families in WA that have been active over a long period but have not been visible. We are going through a period now where there is significant new wealth creation and these people are new to philanthropy and should be encouraged.

In the causes that I am involved in, I have taken some visibility but have not necessarily had the need to be the front person. I do understand the importance of having a more public role and when appropriate it is something I will put more time into.

How can we improve our philanthropic portfolio management?

I would say in Australia we are decades behind best practice in the US where portfolio management is generally a lot tighter and there are clear benchmarks in terms of performance. The degree of sophistication is very weak and the volatility that is assumed when managing portfolios would just be unacceptable in the US. The idea that a conservatively managed portfolio is 100 per cent Australian public equities and cash, is a fallacy.

An endowment style of investing is intergenerational, and they are prepared to make longer term investments with less liquidity but significantly reduced volatility. I think there is certainly, in WA, a lack of understanding of how to manage a pool of capital or an endowment and a lack of willingness to accept changed models in terms of portfolio management.

I would like to see a high level of investment discipline adopted here. Integral to giving people confidence to give, is the reality that you have a professional investment team able to manage the money in accordance with international best practice. There needs to be a greater openness to having a board of trustees supported by a larger group of people that bring a range of skills and experience, having had broad commercial experience to these issues.

Can you tell us more about your personal giving?

The McClements Family Foundation is a private ancillary fund, it is smallish but growing in intent. The focus is primarily education, with a strong alignment with my wife's old school where our daughters now go, and my university UWA. We also focus on building capacity for the mining industry through establishing scholarships and networking opportunities. I am also a patron of the Hackett Foundation.

Through my involvement with UWA I aim to engage with the university around the questions of best practice and managing the dollars once raised. Giving is more than just dollars, it is about capacity building and leveraging networks and contacts. I hope to lead by example and to practise what I preach through the McClements Family Foundation. ■

Andrew and Nicola Forrest

Back in 2001 **Andrew** and **Nicola Forrest** established the Australian Children's Trust, to assist underprivileged children and young people. The Trust has a mandate of 'helping people to help themselves' and focuses on early intervention, empowering women with children, and supporting education, personal development and training for employment. *Australian Philanthropy*'s editor **Louise Arkles** spoke with Andrew and Nicola in February 2012 about how their philanthropy has developed over the past decade, and their ideas for growing the philanthropic pie.

Nicola: Eleven years ago we established the Australian Children's Trust with Andrew's view to helping our Indigenous people most in need. I have always worked to this, but suddenly we had a means to start outside of this mandate when Andrew gave a much larger gift to the Trust. Up to that point the Trust had been reactive, responding to applications, and we've learnt much from working in that way.

However after that substantial gift we made a decision to initiate major projects and refine our focus to a model where we identified partners and governments to the Trust's reach. We kept fighting to end the Indigenous life expectancy and wellbeing disparity, but now also assisted some 50 other causes, and actually put people on the ground to run these projects. Andrew mobilised large networks quickly, in one example to assist the worst affected areas of the Black Saturday bushfires, and we stayed for two years. In effect, we have evolved from reactive to being proactive and strategic, with a view to influencing social agendas and government policy to move from welfare to employment.

"Our belief is that to solve entrenched problems you have to first create the end solution, i.e. set up the employment opportunities first and then work your way back, via training, health and education."

In order to support smaller, more specific causes like the arts, we have set up a PAF called the Forrest Family Foundation, which gives us greater flexibility to support privately some things we've been very interested in personally, outside the remit of the much larger Australian Children's Trust.

Andrew: That's a good wrap up, Nic. The Children's Trust has a set of big picture initiatives, such as what Nic mentioned, the drive to close the Indigenous life expectancy gap and to increase quality of life.

We believe that the only way to tackle Australia's chronic Indigenous welfare problem is through employment. With support of Kerry Stokes' and Jamie Packer's families, GenerationOne set Australia a goal of creating equality of opportunity and responsibility in one generation. This can only be done through employment, created by job-relevant and job-specific training. This fast-tracks a long term unemployed person into a career which then eliminates the disparity for that person.

Our failed welfare model continues to cost Australia tens of billions and our reward is just to see the disparity widen. Something has to give, so we set about changing Australia's attitudes to welfare, as a solution to anything, and instead created 50,000 jobs. The idea was to create a simultaneous bottom up and top down solution. Attitudes first and guaranteed jobs second. Now Australia has a solution and the government can provide the training to allow Indigenous people out of the welfare whirlpool.

Working with its sister initiative, the Australian Employment Covenant, we are seeing attitudes change and jobs created across the nation. Already some 8,000 have crossed over from welfare to work in the biggest single initiative yet seen. However this is even before the Australian Government has provided its promise under the Covenant – job-specific employer-directed training – to meet what are now thousands of jobs for appropriately trained Aboriginal people.

Our belief is that to solve entrenched problems you have to first create the end solution, i.e. set up the employment opportunities first and then work your way back, via training, health and education to where the Australian Children's Trust has also been working, which is with women and children.

GenerationOne has 220,000 members, growing daily, and this complements the 320 business Covenant members, including many of Australia's most reputable companies who have guaranteed over 60,000 job opportunities. It is both corporate and government – changing attitudes towards welfare and Aboriginal people who are thriving on the equality and the challenge.

It is up to the Australian Government to fulfil their part of the Covenant, to supply the training. This initiative spells the end of the clearly-broken model of welfare!

Nicola: So to make major change, we need collaboration – government, corporates and communities all working together towards a shared vision. I think it's vital.

In a different space, we are currently redeveloping our offices on an incredible site in Perth – called Sunset, the once barb-wired up old people's home. The idea is to create a centre

Andrew Forrest in Ethiopia at one of the local orphanages, about to play soccer with the kids.

of philanthropic excellence, a place to bring philanthropists together to share infrastructure, administrative resources and meeting rooms, and to foster dynamism and collaboration.

"Much of our philanthropy has been anonymous because of our belief that it is best to give without strings attached. We are only now evolving from that attitude if it adds considerable value to the recipient or the cause, we could go public."

Andrew: We've been engaged in philanthropy in a formal sense for 11 years, but have been giving for most of our married life. Much of our philanthropy has been anonymous because of our belief that it is best to give without strings attached. We are only now evolving from that attitude, seeing that we can be anonymous where possible but, if it adds considerable value to the recipient or the cause, we could go public with our contribution. If it is not important that we have a public profile then we would rather give the opportunity, say for naming rights, to someone else where it will encourage them to give to that cause.

Our family has been asked to join the Global Philanthropic Circle, founded by Dr Peggy Dulany Rockefeller, which assists our thinking with philanthropists around the world. I've just come back from philanthropic meetings in China, where there is a movement beginning – a ripple, or perhaps more a flame of philanthropy is catching fire. Prior to that we visited Taiwan where already quite a bit of philanthropy is happening. It's going to be as powerful a force for good and civil society as anywhere else in the world.

In China, because it's centrally controlled, how much tax they pay is of perhaps greater importance than how much money they give away. Interestingly, what came out of these meetings between the Global Philanthropic Circle and China's largest philanthropists, were words like compassion, love, help for anyone who needs it – wild words for Chinese business people. They really want to give, they often just want to know how. In Taiwan for example, there is a company called Formosa which has set out to help educate the very poor Chinese mainlanders, so they did a joint venture with the government – guess how many schools they're aiming to build in rural mainland China? 10,000!

Nicola: That's a great example of social investment. It's about empowering communities so they can improve things for themselves, and most communities do have the answers themselves. It's about unlocking that potential.

Whereas government welfare employs a scattergun approach, philanthropy has a sharper, more accurate focus as by definition it's so much closer to the community. For the dollars spent, private philanthropy will always be many times more effective than government welfare.

One of the more successful smaller models we've been involved with is the Men's Shed at Fitzroy Crossing. It was a collaboration of business, philanthropy and government, and that is the model that will prove sustainable. Part of the frustration is the difficulty of understanding who is involved in what space. In a town like Halls Creek with a population of 2000, there are about 25 different service providers. So it's not about needing more money, it's about needing leadership.

Andrew: The reason we agreed to this interview is to stress that philanthropy needs to start with leadership and the will to change through sustainability, not welfare. A second reason

Nicola Forrest in Nepal at the Maiti Nepal concert September 2011.

is to encourage Australia's attitude towards giving to develop. Right now Australia's culture doesn't encourage giving, and it is tended to be viewed through the lens of the tall poppy syndrome. There's little celebration of giving, instead often a cynical undercurrent of questioning motives.

"The media have a serious role to play here. If the press fosters this negative attitude, philanthropy will be kept behind a protective wall of privacy."

Once we gave away over $100 million worth of shares, and being shares we had to announce the gift as per the ASX rules. At that time the share price of Fortescue was rising sharply, so the headline was "Forrest makes over $100 million in one day but gives away less". If we were too sensitive, these recriminations would have inhibited our giving. The press reaction was observed closely by others, who may themselves have been inhibited from giving. That's a great shame.

The media have a serious role to play here. If the press fosters this negative attitude, philanthropy will be kept behind a protective wall of privacy, and people won't want to give openly, and as a consequence are likely to give less than they possibly could. However if philanthropy was celebrated, then we'd have an Australian psyche which would encourage giving of all types, openly and privately.

Nicola: One way we can support that change is by ensuring the positive stories are shared. When donors visit schools, community centres or even prisons, arts centres or isolated communities where their gifts are making a real sustainable difference, then it matters less to them what the nay-sayers think.

However regardless, Australia needs to move to celebratory giving. The satisfaction that comes from high-end engagement takes philanthropy way beyond the 'feel-good' to sustainable change. This does mean we take risks, but we are comfortable with that and as Andrew says, active philanthropy involves leadership, and that by definition heightens the risk.

Andrew: When we set up the Children's Trust the charter was 'to go where angels fear to tread'. We aim to initiate substantial social change initiatives that government or NGOs will take over once the risk is mitigated satisfactorily. We have to be comfortable to be in that high risk area.

From reducing the Indigenous life expectancy and wellbeing disparity and encouraging the Australian people to eliminate it in one generation, to human trafficking and slavery, we encourage fellow philanthropists to give and to be unafraid to lead. However and wherever they choose, giving will lead to a more just and fairer society than a government could ever hope to achieve. Working collaboratively with philanthropy, governments can be way more effective with taxpayers' dollars than they could ever be on their own. It's all about positive collaboration and encouragement of both government and civil society. ■

Australian Children's Trust

Vox pops

There are a number of young leaders active in the social entrepreneurship space in Western Australia who are still under thirty years of age. *Australian Philanthropy* profiles three worth following:

Lachlan Cooke

ICEA Founder/Chairman
Facebook: facebook.com/iceafoundation
Twitter: @iceafoundation
Website: www.iceafoundation.com.au

Inspiration
I was first introduced to the Bardi people from One Arm Point, a remote community in the Kimberley, in North Western Australia when I was in year 11 in 2006, through a boys/mens leadership camp held by Indigenous organisation Garnduwa. The trip opened my eyes to the amazing culture of the Bardi people and I made many friends in the community.

I was inspired to establish an organisation to bridge the educational gap existing between young people living in these remote areas, compared to regional centres. It started with establishing a Library in Beagle Bay and from there in 2007 we established the ICEA Foundation, which exists to make national reconciliation a reality through grass roots youth initiatives.

Purpose
National reconciliation is our purpose – all Australians united through mutual respect for one another.

Challenge
The biggest challenge is developing the optimal programs needed to achieve our purpose. The consultation, as enjoyable and important as it is, is a very slow process, however we are now very confident that we have a set of programs to make this vision a reality.

Opportunity
My biggest opportunity was being a part of the Commonwealth Youth Forum planning committee for CHOGM in 2011, and the Australian delegation for the UN's Child's Rights Convention in Geneva in 2011. I learnt a great deal on the importance of youth participation and engagement, and on global initiatives for peace building and reconciliation.

Holly Ransom

Incoming President-Elect of the Rotary Club of Crawley
Twitter: @hollyransom
Website: www.hollyransom.com
Website: www.rotarycrawley.org.au

Inspiration
I'm motivated by change and a burning desire to have a positive social impact. When I went to my first Rotary meeting in April 2011 they played a video that said "of the 1.2 million people in Rotary only 2 per cent are under the age of 30 and only 12 per cent are women" and this rang huge warning bells in my head. I couldn't help but think that unless something changed Rotary would be non-existent in 10 years and I passionately believe that Rotary is too powerful a change agent, worldwide, to sit by and let that happen.

Purpose
I want to lead a sustainable, intergenerational change model within the club that cements this 'new Rotary' as a viable model for Rotary moving forward. I also aim to share our approach within the Rotary International community in order to help drive change within the organisation at an international level.

Challenge and opportunity
These two are fused for me – my biggest challenge is to make this new model work and work so well that it spreads like wildfire amongst what is traditionally a very conservative organisation. At the same time, this provides me with the biggest opportunity to make enormous change through empowering the incredible 1.2 million strong Rotary community with a different way of doing things that allows the organisation to thrive and to continue its incredible work.

Michael Sheldrick

Campaign manager with the Global Poverty Project
Twitter: @micksheldrick
Website: www.theendofpolio.com

Inspiration
I became aware that polio was still a significant world health problem when I met David Goldstone, a member of the Rotary Club of Crawley. Rotarians instigated the global push to eradicate polio, and the Crawley Club had awarded me a youth scholarship based on my work with the Global Poverty Project. I got talking to David and he told me how he had suffered with polio as a young man, pulling up his trouser leg to show me the calliper he still wears. This was the first time I really saw the human cost that a debilitating disease like polio could have.

Purpose
Global Poverty Project (GPP) is an Australian-grown international education and advocacy NGO working to catalyse the movement to end extreme poverty. Last year, I led GPP's successful campaign, The End of Polio, which helped secure $118 million of further investment in global polio eradication efforts.

Challenge
I find people can often be cynical about our ability to create change. The fact that since 1988 global collaboration has reduced the number of polio cases by 99 per cent demonstrates very clearly that change isn't just possible, it's real!

Opportunity
The greatest opportunity was when I was granted an audience with the Prime Minister to discuss polio. She showed great interest in our campaign and ultimately agreed to place polio eradication on the agenda of the Commonwealth Heads of Government Meeting, hosted in Perth last year. $118 million in total was pledged towards polio eradication by governments and philanthropists, including Bill Gates.

Should philanthropy extend to the workplace?

By **Edward Kerr**, Chief Executive Officer of The Australian Charities Fund.

Michelle Hutton, Edelman Australia's CEO, certainly thinks so. When releasing Edelman's 2012 Trust Barometer findings she said, "The public expects business to do more than just make money and create jobs. They expect business to improve the world it operates in, act ethically, treat employees well and help local communities. This is the difference between trusted and distrusted companies."

Edelman found that societal attributes (such as addressing society's needs, positively impacting the local community and treating employees well) are more important to building future trust than operational attributes.

"If just 10 per cent of Australia's workers donated $5 per week, an additional $300 million would be available to the community sector."

Western Australia is in boom times. Building trust with the community and attracting and retaining talent are paramount to success.

At The Australian Charities Fund, our experience has shown that by establishing a workplace giving program and involving employees in the design, delivery and outcomes, employers have the opportunity to build employee engagement, harness the collective generosity of their people and enhance their reputation in the communities in which they operate.

In late 2011 the Deputy Chairman of The Australian Charities Fund, Greg Hutchinson spoke at a number of functions in Perth organised by Giving West to promote a culture of giving in the workplace. Kevin MacDonald, CEO of Giving West, is keen to promote giving in the workplace as part of Giving West's strategy of promoting philanthropy in Western Australia.

From data The Australian Charities Fund has obtained from the Australian Taxation Office, we know that across Australia over 100,000 workers in almost 3000 employers are donating approximately $30 million annually through payroll giving – this is the process of regular pre-tax donations via payroll deductions to deductible gift recipient charities. Almost half of these donations are matched by their employers, resulting in total annual donations of approximately $42 million.

Sounds good? Yes, but it is nowhere near its potential.

Today, about 1 per cent of Australia's workers give by payroll deductions. If just 10 per cent of Australia's workers donated $5 per week, an additional $300 million would be available to the community sector.

There are over 20,000 enterprises in Australia generating more than $10 million in annual revenue (many of them being in Western Australia). This is an enormous pool of potential support for the community sector within the employers of Australia. Importantly, our research shows most people who donate through the workplace do not reduce donations they make outside the workplace, which is a great reason why charities should promote the growth of giving in the workplace.

At The Australian Charities Fund we believe employers will be more impactful if they adopt a holistic approach to their giving strategy, including, where appropriate, payroll giving, one-off fundraising, skilled or unskilled volunteering, grants and in-kind support. We are seeing a growing trend of employers seeking a narrower range of community relationships, but which are much deeper and more relational than in the past.

Working in collaboration with Giving West, The Australian Charities Fund is aiming to promote the growth of a culture of giving in the Western Australian workplace. Information kits are being made available to help employers launch and promote workplace giving programs and to help charities connect and inspire employers to support their work.

The Australian Charities Fund also is working with its 120 plus charity partners to encourage them to collaborate amongst themselves and with the business and government sectors to promote giving in the workplace. Anyone interested in finding out more about these initiatives can visit our website or contact us on 02 9024 8630. ■

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THE AUSTRALIAN CHARITIES FUND

Contributing to the community is all part of the culture for ABN Group

Dale Alcock and **Garry Brown-Neaves**, of the Alcock Brown-Neaves Group.

Over the last five years the Alcock Brown-Neaves Group (ABN Group), a residential builder in Western Australia and Victoria, has donated over $5.5 million to more than 30 charities, and the passion for doing so is shared by business founders, Dale Alcock and Garry Brown-Neaves.

Garry explains, "Working together over the last 25 years, Dale and I have always looked for ways to contribute and give back to the community. With the size and maturity of the business, it just seemed right to formalise what we give back, based on a percentage of our profits.

"We used to receive lots of requests for funding from family and friends involved in charities on an ad hoc basis. It can be really tough to have to say no to helping a charity or not-for-profit, but we needed some way to make the application process fair and allow us the space to assess the request on our terms. Having a foundation has allowed that."

With ABN Group going from strength to strength, initially in WA and more recently in Victoria, a decision was made in 2006 to launch the ABN Foundation, with the remit of giving back to the community.

"We formed the ABN Foundation as a private ancillary fund to ensure the legacy of the ABN Group's giving in the community for future generations," Garry said.

Since that time, the company has donated over $5.5 million to worthy causes nation-wide, including the Salvation Army Queensland Disaster Relief Appeal, the Red Cross Victorian Bushfire Appeal, St John of God Comprehensive Cancer Centre, The Smith Family and the Ear Science Institute Australia.

"We're genuinely very pleased to be in a position to assist a range of not-for-profit and charitable organisations and to step in and help in times of natural disaster," Dale elaborates. "As builders, we know how much love people put into their home and everyone at ABN Group found it distressing to see hundreds of homes devastated and even washed away by the Queensland floods last year. We were determined to help Queenslanders rebuild their lives and donated $500,000 to the Salvation Army Queensland Disaster Relief Appeal.

"Australia had a very hard year with natural disasters in 2011 and we also assisted victims in WA and Victoria, donating $95,000 to the Red Cross Victorian Flood Appeal and $100,000 to the Lord Mayor's Distress Relief Fund for victims of the Perth Hills Bushfire."

When it comes to deciding what causes to support, the ABN Foundation has enviable flexibility and scope.

Dale Alcock (left) and Garry Brown-Neaves.

"We have a two-pronged approach in how we manage the ABN Foundation. Firstly, most of the businesses are aligned with a not-for-profit organisation. Our people are involved in deciding who they want to align themselves with. We try to partner with the organisation for 2-3 years and generally seek out applications for funding that do not receive government grants and will immensely benefit from our support. Not-for-profit partners that provide volunteering opportunities for our people are ideal; it's a great way to engage our teams with these organisations and give something back themselves," Dale explains.

"Secondly, we also give out ad hoc donations and funding, usually for relief situations. These decisions are made directly by us. Our HR manager, Tracey, manages the requests, but ultimately Garry and I make the decision on who we wish to support."

"We deliberately decided to have no set formula when it comes to evaluating proposals," Garry explains. "We look for those who we think need it most, how much passion the people driving it have for their cause and the difference the funding will make for them.

"We don't currently ask for any formal reporting or set KPIs from our not-for-profit partners. At the end of the partnership we look at what has been achieved and whether we will renew that relationship based on whether the organisation has made the difference they said they would."

And so what advice would the founders of ABN Group give to others starting down the path of philanthropy? "I think we'd both say just do it", says Dale. "The bottom line is it's all part of being a socially responsible company that understands the importance of contributing to the community." ■

David Flanagan

David Flanagan is a geologist and the Executive Chairman of Atlas Iron, an iron ore producer, developer and explorer in the Pilbara. He received the inaugural Governor's Award for Giving in 2011 for his hands-on commitment to charitable causes. Although private about his personal giving, David is a powerful force amongst Western Australia's new wave of philanthropists, walking the talk and inspiring others to do the same. He spoke to **Tanya Kay**.

Atlas Iron has built a reputation for corporate philanthropy and volunteering within communities. How did this come about?

It just kind of happened over time. It doesn't happen in a top-down corporate sense. Our staff know that giving is aligned with the values of the business. As a result we tend to attract more people that are charitable, and we believe they also perform better.

I was told the best way to get involved in philanthropy is to do something that you are passionate about. Your enthusiasm then inspires others. Now anyone that takes on an Atlas Iron contract knows they will be asked to kick in for one of our charities or all of them, and we will kick into theirs.

What do you see as the benefits of corporate social investment?

When you engage in a genuine act of kindness, it builds resilience in you and in the business as well. The energy and capacity-building powers that result from genuine giving are visible in increased productivity. Corporate giving and volunteering are thus good commercial investments also.

We have a set of company values that include leaving a footprint. By creating opportunities for staff to live those values, they become ultimately more aligned to the company's values. After our first team development day in Fremantle, we could really see the alignment happening. We assess our people on their performance in the business and the way they conduct themselves and behave around our values.

For your second annual teambuilding day you chose to have the entire company volunteer within the community of Port Hedland, contributing to a range of community projects in a one-day 'blitz'. What outcomes did you achieve?

Port Hedland is a national infrastructure asset that generates more revenue for Australia than anything else in the country. In the next 10 months it will generate more profits for the mining companies than Kalgoorlie has in the last 100 years. We wanted to show the local community of Port and South Hedland that we were prepared to give our time, not just money and the benefits delivered to them by us and our operations.

The volunteering teambuilding day was a massive undertaking that took months of planning. It required an external company, Transforming Teams, to project manage the logistics to move over 200 staff and contractors and to facilitate the community consultation. "Ngayanhtharti" or "We Together" in the local Kariyarra language was the theme of the day. Together with members from the local community, across five locations and four primary schools, we delivered some incredible outcomes.

The schools received a gift of their choice, ranging from iPads to BBQs. At Tkalka Boorda Aboriginal Community, volunteers worked beside residents to install new play equipment, shade sails and swings at local playgrounds; provide a BBQ area; create basketball and netball courts, and plant trees at residences. The Hedland Community Living Association requested an uninhabited building be turned into a radio studio and the Lawson Street Youth Centre got a facelift and a new shed. The 'blitz' acted as a catalyst for local service providers to get involved and even the council's parks and gardens workers turned up on the day to assist, together with the SES and Variety.

We ultimately found this experience more powerful than our first because it was so closely aligned with our company.

What different types of philanthropy does Atlas Iron engage in?

We support optional planned workplace giving. The staff choose where the money goes and we match what they give. We also give 1 per cent of profit. This year we will probably end up contributing more than $2 million to philanthropic causes.

Our philanthropy does not operate as a foundation but is run by the company, so we are not limited to giving to charitable foundations to qualify for a tax deduction.

For our corporate giving we focus on the Pilbara, Indigenous and Western Australian causes. We develop partnerships within communities, often places where we are operating. We want people in those communities to see that we can benefit them by being there.

Sometimes we support straight philanthropy, where someone comes to us with a need. That can involve an element of venture philanthropy, supporting something new and innovative in a region. Our support of Many Rivers Microfinance is an example of this. We were initially approached for a grant by what was then very much an underground movement, to enable Aboriginal people to borrow money and start businesses in the Pilbara. Our support acted as a catalyst for further

David Flanagan.

Building a playground at the Tkalka Boorda (3 Mile) Aboriginal Community. (Photo: courtesy of Transforming Teams)

funding from the mining sector, and today they run six offices around Australia and have given more than 170 loans to start small businesses.

There are probably 20 or more organisations that we have helped with grants over time and we do go out and look for projects also.

According to the World Giving Index 2011, 'volunteering time' was the least common giving behaviour in Australia. Why do you think this is and how best do you think it can be addressed?

It comes down to the mutual benefits, and I just don't think people get it. I am involved in eight not-for-profits and I don't think I would be anywhere near as effective if I was not involved with them. The relationships and opportunities that have opened up as a result are priceless. Organisations that have experienced these benefits need to be vocal advocates for it. The act of giving builds so much resilience and capability in the giver, it makes you want to give more.

I would like corporate Australia to explore the concept of a national teambuilding day that benefits all the communities where they operate across Australia. I believe if we can get 50 to 100 corporates to consider doing their team development days within the community, we can achieve some amazing outcomes and a collective benefit shared by all.

What life experiences have motivated you to be personally philanthropic?

My father was always involved with community stuff and as a family we used to do the Salvation Army Appeal every year.

As a 17-year-old from Bunbury I went to Kalgoorlie to study at The School of Mines. Whilst on a run one night I came across a group of Aboriginal fringe dwellers living in the dirt. I was blown away by the poverty so close to a prosperous mining centre in Australia. This experience made me stop and take stock. The second thing that shaped my view was when I had kids. Suddenly all that mattered to me was them, and that they are proud of what I have done with my life. I want the world that I leave for them to be better for me having been here.

"I am involved in eight not-for-profits and I don't think I would be anywhere near as effective if I was not involved with them. The relationships and opportunities that have opened up as a result are priceless."

I believe that philanthropy in WA is at a tipping point where it is about to take off. There is a lot already being done and more that can be done, but I have a really optimistic view of the future. ■

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The research path to growing giving

By Emeritus Professor **Margaret Seares AO**, author of *A Rising Tide? Exploring the Future of Giving in Western Australia*, which was published in 2010 by The University of Western Australia and supported by Lotterywest.

Can a culture of philanthropy be created? This was the question lying behind a research project undertaken in Western Australia during 2009-10. The genesis of the project was a forum held in 2008 at The University of Western Australia (UWA), during the last heady days of the boom, at which key philanthropists questioned why a state allegedly awash with money was not seeing a lot of that money flowing into philanthropic giving.

There was something of a paradox in the forum being held at UWA, as the University was founded on what was probably the most generous act of philanthropy ever to have occurred in Western Australia, when Sir John Winthrop Hackett gave the then-huge sum of £450 pounds, the equivalent of around $32m today, for the establishment of a university campus in Crawley. But Hackett's example did not lay the foundations for a strong tradition of philanthropy in WA but, instead, a pattern where very generous acts have continued to occur only spasmodically, often from individuals little known in the wider community.

From the forum in 2008 came about a research project, funded by Lotterywest, and auspiced by UWA. Sally Edwards undertook the research components with myself as project manager. We convened a steering committee, chaired by John Poynton, a philanthropist who had been a key driver of the forum mentioned above.

Researching philanthropy

The project, which resulted in a report called *A Rising Tide: Exploring the Future of Giving in Western Australia*[1], commenced with a desktop review of what was happening globally in fields related to philanthropy and, in particular, what had happened in terms of promoting the practice of philanthropy in a community. It also looked at what was happening in Australia and, specifically, in Western Australia. The data[2] suggested that, despite private wealth increasing faster in WA than in other states during the previous decade, the average donation did not increase as quickly. In particular, the affluent in Western Australia tended to give less than their counterparts, especially New South Wales and Victoria, albeit with a few notable exceptions. Yet levels of volunteering in Western Australia were high and very comparable with national trends.

All this is not to suggest that there has been a dearth of philanthropy in WA. That is not the case, and there are some community members who have been extraordinarily generous in their support for areas such as medical research, the arts, youth development, the disadvantaged, and the like. It was the limited extent of this generosity that was of note.

Impediments to giving

What were the impediments giving rise to this anomaly where the wealthiest state in the nation appeared to be almost a laggard when it came to philanthropy? A series of interviews with individual donors, together with focus groups and surveys, suggested a range of reasons, with two that were seemingly prominent in WA. The first was the nature of the boom-and-bust economy that has always prevailed. There is an almost subconscious community knowledge that there will inevitably be a bust following any boom. This tends to generate two quite different kinds of behaviour: one is the 'spend it up' syndrome; and the other is a hoarding instinct, and one that focuses on looking after the next generation of family when times turn bad.

The other item of note was the lack of strong Jewish community leadership in philanthropy, such as occurs in Melbourne and Sydney. The reasons for this are complex and best left to a historian of Jewish cultural and migration history, but it is regarded as relevant in any discussion of philanthropy in WA.

Fragmented and competitive

From the perspective of donors, and of some people who were potential donors, another issue was the fragmentary and sometimes competitive nature of the not-for-profit sector in WA. There are sometimes two, three or even four organisations that support a particular type of medical problem, or environmental issue, or art form, and some donors find it very difficult to work out the best way to make a difference in their area of interest in such a fragmented and uncoordinated landscape. In such circumstances they will often do nothing.

Strategies to promote giving

So the questions were focused, not only upon what accounted for the particular circumstances of philanthropy in WA, but also upon what could be

done to stimulate a more broadly based culture of philanthropy. Efforts overseas to promote philanthropy revealed a range of strategies that the *A Rising Tide* report summarised as:

1. Legal Reform Strategies
2. Market Segmentation Strategies
3. Public Awareness Campaigns
4. Donor Leadership Strategies
5. Donor Education Strategies
6. Strategies to Engage Professional Advisors
7. Place-based Philanthropy Initiatives
8. Peer-based Philanthropy Initiatives
9. Issue-based Philanthropy Initiatives
10. Philanthropic Infrastructure Initiatives

It was recognised, however, that efforts to promote philanthropy have often confronted challenges to do with legal and financial hurdles in different constituencies, together with differing cultural attitudes towards provision of support for others.

The report then discussed key ideas that people thought could be effective in promoting better giving in WA, summarised in this word cloud.

Interviewees recognized that just one of these suggestions, in isolation, would not achieve the desired outcome, and that things would not change overnight. There was also a feeling that, with a growing number of fundraising campaigns emerging in universities, schools, medical research organisations and arts organisations, there would have to be a major push into parts of the community not on the standard 'go to' list of high-net-worth individuals, and that to do this would take a very carefully crafted communication strategy. There were also concerns expressed by some members of the not-for-profit sector that a strong push to increase philanthropy would encourage the State Government to withdraw from existing funding responsibilities.

Ways to grow giving

The Steering Committee responsible for the project then took the range of suggestions and reduced them to the following functions for consideration:

- A single Giving Exchange offering a connection or matchmaking service, based around the main areas of philanthropic focus (e.g. medical research, Aboriginal disadvantage, the arts, conservation, etc.).
- A portal service aimed at making it easier to access knowledge about giving.
- An ongoing communication program promoting giving in general as well as specific types of giving (e.g. donations as gifts, bequesting, percentage giving).

- Engagement programs for specific demographic groups including young people (primary to post-secondary).
- Research (local or collaboration on national/international projects).
- Peer learning programs and facilitating ongoing networks for givers and receivers.
- Focal point for liaison with State Government (e.g. about state-based fundraising laws and macro-level policies such as matching funds) and Local Government (e.g. about community level giving).
- Development and supply of support resources for financial advisors, educators, fundraisers, not-for-profit executives and other professional stakeholder groups.
- Active collaboration including joint ventures and the hosting of programs.
- Focal point for national and international organisations to connect with Western Australia givers and recipients.

Giving West

The Committee discussed whether this work was best undertaken by an existing body, by government, by a consortium of partners, or by a new organisation working in tandem with existing philanthropic support organisations. From this, a new organisation, Giving West was born, with a brief to develop, with appropriate partners, a range of programs to deliver the functions listed above. Giving West is chaired by the chairman of the Steering Committee, John Poynton, and its initial board included and includes members of the Steering Committee, some philanthropists, some members of the not-for-profit community, and from the wealth advice community.

The *A Rising Tide* report provides extensive research and feedback to work from, and it is hoped that, over time, with engagement from the wider community, the culture of giving in Western Australia will reflect its status as one of Australia's most, if not the most, affluent states.

A Rising Tide? Exploring the Future of Giving in Western Australia can be downloaded from the Lotterywest website. ■

www.lotterywest.wa.gov.au/grants/news-and-events/publications/publications

1. For the final report of the project *A Rising Tide: Exploring the Future of Giving in Western Australia* see *www.lotterywest.wa.gov.au/assets/grants/documents/publications/a-rising-tide*
2. The most up-to-date data at the time was sourced from Philanthropy Australia's Giving Australia Report 2005; Australian Taxation Office Reports on Donations Claimed as Tax Deductions; and the Australian Bureau of Statistics Reports from 2007.

Wayne Bubb is Chairman of the James Galvin Foundation. With over 35 years experience as an organisational coach and financial planner, he is an accredited family business adviser with Family Business Australia (FBA).

The Galvin family decided to formalise their long term ad hoc giving by establishing a PAF in 2010. As a family they decided to work together through the PAF and to actively engage the next generation in their philanthropic activities and decision-making. Those family members not previously exposed to business or philanthropy, have gone on a journey of learning about philanthropy that is having a positive flow on effect for them as a family in business. They are also keen to establish a junior board to further build capacity for the future.

The Three Circle Model, which Wayne recommends, defines three core areas for families in business to consider: the family, ownership of the business assets and wealth it creates, and the day to day operations. Just as a business has a board and shareholders, the family appoint family members to a family council to address important family matters that might be considered governance issues. A family charter is established that sets out the family's core values that determine the criteria the philanthropic board uses to decide what projects to support.

The Family has found that by going through this process it clarified wealth ownership, management and where philanthropy sits. It has enabled them to make informed decisions together on how to invest the money and what projects to support in a united and informed approach to their philanthropic legacy.

As a result, the Foundation has made its first significant three year contribution to a well established and well researched charity. ■

Jarrad Tate is a manager with KPMG and a director of the Tate Family Foundation, a PAF established in 2010. The foundation was eligible for the state-run Philanthropy Incentive Program and a donation of $39,000 was made in its name to support Theatre Kimberley, an outreach program for disadvantaged youth in the Kimberley region of Western Australia.

My family has always been charitable but we have found that establishing a PAF has given our philanthropy a structure and brought us closer. It has also been a good way for us to honour and acknowledge my father's life's work.

We sought external advice from the Myer Family Office and they were involved in the initial setup. Our Foundation is governed by a board of six volunteer directors, each with a set of skills that enables us to share the workload. Our aim is to keep costs to a minimum in order to maximise the distribution we can make each year.

In the beginning we set clear guidelines for making grants. The focus areas we have chosen have been influenced by personal experiences. They are disadvantaged youth, child medical research and animal welfare. As a board we research various organisations within these areas to assess where we think our funds will have the biggest impact.

The Philanthropy Incentive Program was our introduction to supporting the arts, and we have experienced firsthand the impact that circus and theatre-based outreach programs can have on disadvantaged youth. We have been inspired by the work done by Theatre Kimberley, and have assisted them with business planning and financial reporting processes.

As an established PAF, I believe we have an obligation to promote philanthropy. There is also significant benefit in networking with other PAFs with similar focus areas, to explore opportunities to collaborate, share resources and make a bigger impact. ■

Dr Marcus Tan

Dr Marcus Tan is a co-founder of the Meridian Global Foundation, a Charitable Investment Fund that has a small grants program (giving around $30,000 since its inception in 2005), and a very active in-kind support program. The fund provides volunteers for various charitable activities and sources in-kind items such as land, gifts and mentors, worth more to the charities than cash alone. Dr Tan also supports his medical school at UWA and chairs a NFP that provides a program called StreetDoctor, a mobile GP practice for the homeless.

My co-founders and I have had access to opportunities and the benefit of successful professional and business careers. We wanted to find a way to give back and help others achieve their goals. Our journey so far has shown us that to get the most out of philanthropy, donating time and getting directly involved is the most rewarding. When setting up our structure and registering for DGR status, we were lucky to have received support from the Freehills pro bono program without which we would have struggled to find advice and support. This is where groups like Giving West are now providing such an important service.

We mostly support projects in keeping with the foundation's values for sustainability, ethics and empowerment. Given our backgrounds these have tended to focus on education and supporting opportunity creation through microfinance, locally and internationally. Because our emphasis is about getting involved and not just making grants, we have a volunteer executive board overseeing the foundation's governance and day-to-day operations. It is important to the success of the foundation that volunteers are professional, accountable and given clear guidelines.

Looking towards the future, it would be great if a benchmark or social norm for philanthropy is established. This would encourage people to give in a pro-active and considered way, rather than reactively. I would love to see a social enterprise fund or prize established that supports social innovation and looking into solutions for the world's social challenges. Philanthropy should also be demonstrated and taught in schools so that our kids can know how lucky they are to live in such a great place and not to take these things for granted. ■

meridianglobal.org

Simon Bedbrook

Simon Bedbrook is a director and volunteer of the Paraplegic Benefit Fund (PBF), originally founded by his grandfather and father in 1984, and also a director of BFS Finance, a financial services firm. He is the inaugural chairman of Impact100 WA.

My family and I have been involved with the PBF over the course of my life. It has shown me firsthand the positive impact one can have on someone else's life, and they on yours, if you make the decision to give.

In my practice I actively encourage my clients to be philanthropic, and I get a lot of satisfaction when they start giving. Initially, I am the one encouraging them to support projects in areas they have an interest in, and I do some initial research and due diligence for them. Once clients are involved, usually no further encouragement is needed. I find they gradually start getting more involved, even travelling to see the projects and volunteering their time and expertise. It's like setting a ripple effect in motion.

Many clients have, as a result, formed their own PAFs, whilst others feel that the financial investment of half a million, to make it worthwhile, is prohibitive. In WA we have lots of first generation entrepreneurs who have 'made it', but interestingly they don't feel exceptionally wealthy yet, even though they are. There is quite a bit of philanthropy happening in the ultra high net worth area but it is the next tier down, the people with $10-$50 million in net assets, that need to get more involved.

In my opinion we need more networking and learning opportunities for philanthropists, more training for professionals on setting up the various philanthropic structures, and more giving circles like Impact100 WA that require smaller investments and allow for more involved decision making on where the money goes. ■

Dr Margaret Feilman OBE

At 91 Dr Margaret Feilman OBE has seen a lot of change in the landscape of Western Australian philanthropy over the years. As the first woman to graduate in architecture at the University of Western Australia, WA's first female town planner and founding member of the WA branch of the National Trust of Australia, she has always held a passion for both the natural and built environment and the communities they sustain.

Encouraged by their mother, Dr Feilman and her younger sister Patricia, who has been acknowledged as one of the early 'godmothers' of philanthropy in Australia, established the Feilman Foundation in 1976.

"In those days we would give little bits of money to all sorts of people," she says. "We would put a little advertisement in the paper and then people would come to us for donations. At that stage there was very little money given by the State Government or any government towards anything that would help the general community." Today the Foundation focuses on providing grants to Australian based not-for-profit projects for the benefit of the environment, child and youth welfare, culture, education, and medical research.

When asked about her vision for the future of philanthropy in Western Australia Dr Feilman said, "There are people in Western Australia with a great deal of money who could be doing more. I think it's disappointing at the top level. You only have to look in the paper. But some people, like the McCuskers, are very generous. It's rather mixed." ■

Ron Bennetts

Ron Bennetts is a member of the BPF Group at Morgan Stanley Smith Barney specialising in private wealth management. Exposed to philanthropy early on in his career at JB Were, he established the Bennetts Family Foundation, a PAF, in 2002.

Immense fortunes are being made in WA and there is a real lack of information and knowledge on how to grow and pass the wealth on to the next generation. Setting up a PAF is one way and ideal for getting the next generation thinking about giving and how to manage money effectively through investments. There is however an obligation for this generation not to lock the next generation in without their approval and that's where having sensible wills and the like become important.

For me, setting up our PAF wasn't a tax event, it was a family decision. We wanted to establish a structure to effectively redirect money to the causes we are close to and by coincidence, some have ended up being closely related to subsequent family events.

The foundation does not have a website, accept submissions or employ staff. I have with time established a good network in the areas we are interested in, such as medical research. Privacy is very important to me and if I was to do anything different, I would not have called it the Bennetts Family Foundation.

I believe if we are going to raise people's awareness of giving, we need to highlight all the options available and ensure they have peer support and a pool of trusted advisors they can call on.

There are many specific events and circumstances that bring people into this field, so over time we are building capacity and developing professionalism. In two generations' time, I expect that this will all be sorted out because you get a natural build-up of expertise and almost by osmosis a transfer of that expertise to the community. ■

Geoff Rasmussen is co-founder and Managing Director of Azure Capital and the Chairman of the Azure Foundation. He has been on the board of Youth Focus, a Perth based DGR, for nine years and chair for the last three years.

I am passionate about youth related causes and came across Youth Focus whilst doing pro bono work in youth health. I saw they were doing good work and that there was an opportunity for me to add value, leveraging my expertise. I have been inspired enough to climb Mount Kilimanjaro in 2010 with a group of businessmen to boost awareness and funds.

The Azure Foundation does not employ dedicated staff. Instead it is run by one external director, and a board and company staff are also involved with the grant-making process. We encourage staff to donate through a giving program, to champion causes and to volunteer through mentoring programs. Our office infrastructure and facilities are available to select charities to foster deeper engagement. Volunteering adds a richness of experience for our employees that improves client interaction. It benefits the character of the organisation, as well as staff retention.

Grants are distributed as follows: 30 per cent for education related causes as we are an education enabled business; 30 per cent for causes recommended by staff; 30 per cent is unallocated and dealt with on a case by case basis through submissions, and 10 per cent is rolled over into an endowment in case the fund needs to be topped up. When your funding is driven by the current year's performance, I think it's sensible to try to build up a buffer so you can smoothe out the ups and downs and protect your long term obligations.

I think people who are fortunate have an obligation to give back. It is good for the soul and good karma. It also improves your personal brand and that of your firm's. I don't want to change the world and am sober about my own abilities but I do want to make a contribution. ■

Kerry Harmanis has been a lawyer, full-time traveller, fish vendor, prospector and a very successful businessman. Since selling his company Jubilee Mines NL, in 2008, he has devoted a large part of his life to spirituality and philanthropy. He has elected for now not to establish a formal structure for his giving, despite its substantial sum, instead choosing to take a more personal approach.

I have made commitments to myself and I always try to give generously… I have a plan for my giving but have decided at this stage not to put a legal entity such as a foundation between myself and the recipients, who tend to somehow find me anyway. As an evolving giver I sometimes find it is difficult prioritising the various requests for donations. This is when organisations such as Giving West can play an important role.

Over the course of my life I have always donated to certain NFPs and good causes that alleviate people's pain and suffering. I also support some causes triggered by events that have touched me personally, such as suicide prevention and some environmental causes.

My philosophy is that if you really want to effect change, you need to change people from the inside out. I try to be an example through my own spiritual quest and by reaching out to people through mentoring and through a meditation college in which I am involved.

It has been said, "We all think we are going to be fulfilled by getting. The truth is we get fulfilled by giving, but we don't give to be fulfilled. We give because we want to give". As the Bible says, "for it is in giving that we receive". I strongly believe one should never give to get recognition or to feel good about oneself, nor for tax benefits. ■

Place-based giving kicks off in Fremantle

By **Dylan Smith**, Executive Officer Fremantle Foundation.

Fremantle holds a unique place in the Australian psyche and still retains a special community spirit with a long history of social justice. It's been just over 12 months since the official opening of the Fremantle Foundation and that event has heralded in exciting opportunities for place-based giving. The long term goal of a significant endowment for Fremantle is now well underway.

Established as a community foundation, the Fremantle Foundation offers people who live, work or play in Fremantle the opportunity to make a lasting contribution to their community. Donations go towards a growing pool of funds that are held in perpetuity, to be invested strategically for the long term social wellbeing of the area of Fremantle. One key strength of the Fremantle Foundation is the ability to highlight priority areas for the community and adapt as time and situations change.

There have been some great examples of place-based giving from donors in our first year. Here are three of the best:

Kylie Wheatley creates Nectar for Women

Kylie Wheatley is proud of her beloved Fremantle, a community that has nurtured her professional and personal life for many years. Through her events company Red Tent Events, Kylie has been behind many of WA's major markets, festivals and community events over the last decade.

Kylie Wheatley.

After building up the popularity of The Nectar Festival, a yearly event Kylie founded to celebrate International Women's Day, she was looking for a way to effectively give back to the Fremantle community.

With the focus of The Nectar Festival being about celebrating and supporting women, Kylie was also keen to see if her donations could support causes relating to women in Fremantle, which is an obvious and fitting request. She decided to set up a Named Fund with the Fremantle Foundation called Nectar for Women. Named funds contribute to the existing funds held in trust by the Fremantle Foundation and can be named in honour of a family, family member, friend or this case, a special event.

Kylie requested that funds from Nectar for Women support generations of women in areas such as pregnancy and birth, post natal care and crisis support.

Peter Bell becomes Patron to build community funds

Peter Bell, the former captain and champion Fremantle Docker, has a strong interest in personal philanthropy and has taken on the task of gently encouraging others to do the same. Fremantle has played a big part in Peter's life and is a special place for his family.

In fact, Peter helped establish the Fremantle Foundation with a donation on behalf of his family and in an instant agreed to give his time and energy by becoming the inaugural Patron.

Peter respects that people give in various ways and for various reasons. For instance, he was keen to make sure donations to the Fremantle Foundation can be made anonymously if requested. He also understands that not all donations are in dollar form, and he helped by asking for in-kind donations to support the rise of the Fremantle Foundation.

In addressing guests at functions Peter's key message to donors and potential donors is that it's not just financial donations that can assist the Fremantle Foundation. At this stage, talking about the Fremantle Foundation and recommending it to others who may be in a position to give is highly valuable, as we build awareness of the Fremantle Foundation as a giving option.

Peter Bell.

Fremantle Ports support local organisations

Fremantle lives in the backdrop of the Fremantle Ports. The sky scraper size ships that roll into town and poke above the existing buildings are welcomed with media announcements. And if you ever forgot the port is there in full operation, the stench of a sheep ship will greet you on the street!

It's an understatement to say that Fremantle Ports is a key commercial leader in the city. Alongside their core business, Fremantle Ports also have an extensive community support program. They chose to support the Fremantle Foundation in recognition of the number of community-based groups there are in our area that thrive on small amounts of financial assistance.

Through support such as that received from Fremantle Ports, the Fremantle Foundation has become another avenue for grant applicants to get help with projects, events or initiatives that support the local community. ■

fremantlefoundation.com

ANZ – responsible business and thriving communities

ANZ in Western Australia employs more than 1,300 staff, operates 85 branches and 381 ATMs. As well as being a retail bank, we provide services to some of Australia's largest businesses, facilitating exports into the Asian region that has become the engine of world growth. By **Jane Nash**, Head of Financial Inclusion & Capability and Acting Head of Corporate Responsibility, ANZ.

At ANZ we are clear on our social purpose: to help build prosperity of individuals, contribute to thriving communities and to grow our business in a responsible way that balances social, economic and environmental considerations. To achieve this we create pathways to security and prosperity that not only serve our customers and staff well, but extend to disadvantaged individuals and communities. This occurs through capacity building programs, employment and education opportunities, grants to local communities and staff volunteering.

We partner with not-for-profit community organisations and the Federal Government to support people on low incomes, including Indigenous communities, to improve their money management capabilities and help develop a long term savings habit.

SaverPlus is Australia's first matched savings program. Low income participants set a savings goal, save regularly towards it over 10 months and their savings are matched, dollar-for-dollar by ANZ up to $500. Matched funds must be spent on educational purposes. In Western Australia, SaverPlus is delivered by Anglicare WA and the Smith Family. It is highly successful in supporting development of a savings habit: evaluation by RMIT University shows 87 per cent of participants continue to save either the same amount or more than they did while on the program and it is making a positive difference in peoples' lives.

MoneyMinded is Australia's most widely used adult financial education program, helping people on low incomes develop money management skills and confidence in dealing with money. It has been delivered in Western Australian communities through partnerships since 2005. An adaptation of that program for Indigenous people, called MoneyBusiness is delivered in partnership with the Department of Families and Housing, Communities and Indigenous Affairs in 15 locations across WA.

MoneyBusiness has helped many people take control of their finances. For example, Karen, a 27 year old mother of five children from Geraldton was on a Centrelink pension and $4000 in debt when she approached the local MoneyBusiness team for support. Karen attended MoneyBusiness education sessions and worked one-on-one with the workers to pay off her debts, and start to save to buy her own home. The MoneyBusiness team also provided information to assist Karen in starting up her own small craft business. Karen says "MoneyBusiness has changed her life" and now brings other young mothers to the MoneyBusiness office.

Geraldton Resource Centre delivers the MoneyBusiness financial literacy program to Indigenous communities in WA.

We also provide Indigenous people pathways to employment. In Western Australia we have hosted 100 Indigenous trainees since our Indigenous Trainee Program started in 2006. Over half of these are school leavers who gain work experience in our branches. Seventy per cent of Indigenous trainees remain in employment at ANZ.

Support for creation of education and employment opportunities in regional communities is provided through the Seeds of Renewal Program. Under the Program, community groups from Australian towns with populations of less than 15,000 people are eligible to apply for a grant of up to $15,000. For example, in 2011 a grant was made to help give disengaged youth an alternative education opportunity to achieve Certificate II and gain work experience via the Wheatbelt Heritage Rail Project, a collaborative project between Shire of Dowerin, RDA Wheatbelt, O'Connor TAFE Institute and Rail Heritage WA.

Our staff are active in their local communities, volunteering for not-for-profit organisations in capacities ranging from packing food for relief efforts to skilled positions on boards of community organisations. ANZ encourages volunteering: everyone has a day's paid leave annually and a wide variety of volunteering opportunities are advertised on our Intranet. ■

Further information about ANZ's community programs can be found at *anz.com/cr* or by contacting Gerard Brown, General Manager Corporate Affairs by email: Gerard.Brown@anz.com

Pathways to sustainable services – supporting community services through change

The last decade has seen significant growth in Western Australia's population and economy. The pressure of this growth on our infrastructure and services has produced a growing divide within our community. **Irina Cattalini**, CEO of the Western Australian Council of Social Service, reflects on the challenges facing the community services sector and the opportunities for philanthropists to share their talents and time (not just their treasure) to make a real difference for the most disadvantaged and vulnerable in our society.

There is great change occurring within the WA community sector that will be of interest to anyone supporting the activities of charitable community services. The Barnett Government provided a much-needed boost to funding for community organisations delivering state-funded service contracts in the 2011-12 State Budget. The increase offers better wages and conditions to many, while posing some tricky issues for those with a more complex mix of funding sources. The recent Fair Work Australia gender pay equity decision also offers the prospect of fairer wages for staff, but there is anxiety that the obligation to pay higher award wages may not be matched by commensurate funding.

There are further reforms afoot at the Federal level that includes changes to the Charities Act and the creation of an Australian Charities and Not-for-profit Commission. These reforms offer potential benefits and risks and present community boards with a catalogue of legal and governance issues. While there is a flurry of activity and a renewed sense of optimism among Western Australian charities and community organisations, most continue to struggle to respond to the growing level of unmet demand for help from those on low incomes under pressure from a rising cost of living.

The impact of the two-speed economy

The profound impact of an extended mining boom on the Western Australian economy is well known: a two speed economy with some sections of society thriving, and others struggling with cost of living pressures. Nowhere is this clearer than in the demand for social services and supports, particularly in crisis services and emergency relief. While we have seen a consistent national trend in increasing demand for social services and a growing gap in unmet need, the situation is particularly stark in the West.

The Australian Community Sector Survey 2011 reported a 15 per cent increase in assistance provided by agencies in WA in 2009-10 compared to national growth of 12 per cent. Sixty per cent of WA services indicated that they were unable to meet a growing demand for services. The level of unmet need was highest in housing and homelessness, mental health and emergency relief. Western Australia now has some of the most unaffordable housing in the nation and the world, and the area where housing stress is most apparent is in a chronic lack of affordable rental properties for low income households in metropolitan and regional centres. Tackling these issues was the key focus of the recommendations of the WACOSS *Pre-Budget Submission*, available at *www.wacoss.org.au*

The impact of state reforms on community services

The WA Council of Social Service is the peak body representing the interests of 650 community service organisations and approximately 400,000 disadvantaged and vulnerable West Australians. The sustainability and effectiveness of community services and their ability to meet growing demand for support is a major focus for the Council. We have been working collaboratively and constructively with the State Government and other community service peaks to reform funding arrangements, reduce red tape, and ensure a sustainable community sector.

In response to the recommendations of the State Government's *Economic Audit Committee Report* in 2008 on the operational and financial performance of the Western Australian public sector, the Premier established the Partnership Forum to oversee the implementation of its reform agenda. The Forum is comprised of the Directors General of State Government human services departments and leaders from the community sector, including the Council. The Forum plays a crucial role in overseeing the implementation of the new *Delivering Community Services in Partnership (DCSP) Policy* which sets out a framework for funding community services through a new outcomes-based approach to contracting. This approach to whole-of-government and whole-of-sector collaboration across human services is unique to WA. It has created a new sense of energy and enthusiasm about working collaboratively across the public and community sectors.

Delivering real outcomes for our community

The aim of the Partnership Forum and the DCSP policy is to deliver better

outcomes for the Western Australian community, particularly its most disadvantaged and vulnerable members. It seeks to do this by strengthening community services, reforming human service contracting, and moving towards a more collaborative approach to the evaluation and design of services.

The actions of the Barnett Government in committing $604 million over four years to provide an on-average 25 per cent increase in funding for state-funded community service contracts, and in sending clear and consistent messages to all State Government agencies to embrace the DCSP policy, have been well received across the community.

Smaller community service organisations in particular face significant challenges in the transition to an outcomes-based approach to service contracting. Where in the past State Government funding agencies have specified inputs and outputs and stipulated the manner in which services are provided, this approach is changing. The new procurement model requires community service providers to design and cost services to deliver particular outcomes. The extent to which smaller organisations have the capacity and experience to do this varies greatly. In practice this can mean having to find new staff with the right skills and experience, buy in support or put in place new accounting and reporting systems, which is all time and resource intensive.

The Funding and Contracting Services Unit of the Department of Finance has been working with the Council and community peak bodies to train and support community organisations to build capacity in outcomes based procurement. This is where there is an opportunity for the corporate and philanthropic sectors to offer their time and talent to assist smaller organisations to build sustainable services and take advantage of these reforms by helping to improve organisational management, governance and financial systems.

The Fair Work Australia Equal Remuneration decision

The recent decision by Fair Work Australia in the equal remuneration case promises to address the inequity in wages and conditions faced by the mostly female workforce of the community sector. The decision has raised both hopes and concerns, the most prominent being the apparent gap between the scale of the increases granted (between 19 and 41 per cent over eight years, starting in 2013) and the quantum of new funding announced to meet those increases ($2 billion nationally over eight years, of which WA might receive 10 per cent).

To reflect the mixed manner in which most community services are funded, a significant slice of the cost of the increase in award wages will need to be met by increases in both State and Federal funding and funds derived from other sources, such as fundraising. WA is a step ahead, with state contracts already receiving a significant increase, but the path ahead remains unclear with Federal funding of services.

Community service employers will need to be aware that the changes to state procurement could mean that services funded under new arrangements may be interpreted as trading activities, bringing them under the Federal industrial relations system and hence the modern award. Western Australia is the only state that has not referred its industrial relations powers to the Commonwealth. While many community employers may have had advice in the past that they can enter or remain under the state system, we recommend that they take legal advice.

The impact of the Federal reform agenda

To add more complexity to this changed environment, community organisations are gearing up for changes to the Charities Act and the formation of the Australian Charities and Not-for-profit Commission (ACNC). An independent commission to support and regulate the sector and improvement to the legislation governing charitable tax exemptions are welcome, but only if implemented in a way that provides simplicity and less red tape rather than an increase in regulation.

The significant point here is that the proposed Federal reforms demand a level of awareness and a capacity to engage which is likely to prove challenging for smaller organisations. It is conceivable that as a result of these converging pressures on the community sector from State and Federal reforms, we risk a change in the diversity and composition of the sector over the next five to 10 years. Smaller organisations may struggle to keep pace unless there is dedicated and intensive support to help them adapt to change. Ultimately, these developments translate into increased need for organisational assistance and calls for support from donors and supporters.

Opportunities to support the community sector

The changing face of the community services sector provides many opportunities for philanthropists to use their skills and expertise to help organisations increase their capacity to adapt to a changing contracting and regulatory environment. With such a convergence of issues, it is clear that contribution of time and talent from those with relevant expertise – particularly in the areas of contracting and service costing, and finance and governance – are likely to be of crucial importance and immeasurable value.

The Council is seeking innovative ways to support the community sector to face these challenges and welcomes the opportunity to facilitate partnerships and collaborative approaches to link philanthropic capacity with areas of high need in the community. We are also keen to help anyone who is interested in getting involved to find the best way for them to make a constructive contribution. This might include organisational partnerships, mentoring programs, pro bono and in-kind assistance, as well as helping those who are interested in going onto a community sector board to identify the right one. There is plenty for us to do, and it's a great time to make difference. ■

$10 million Social Enterprise Fund for WA

The State Government has awarded Social innovation in Western Australia (SiiWA) the capacity building role in a $10 million Social Enterprise Fund, leading a consortium which includes Social Ventures Australia, Social Traders, the Centre for Social Impact and the Western Australia Council of Social Service.

The Fund will invest in businesses that trade to deliver social purposes. The Social Enterprise Fund Grant Program will accept applications for funding to support organisations at three different stages of development: exploration, start-up, and growth. It is designed to increase the number, effectiveness and efficiency of social enterprises in Western Australia, and will support the not-for-profit sector to establish new, or strengthen existing, social enterprises.

For more information go to *www.siiwa.org/projects/social-enterprise-fund-western-australia/*

Telethon Institute appoints new Director

Leading paediatrician and infectious diseases specialist Professor Jonathan Carapetis has been appointed the new Director of the Telethon Institute, following the retirement of Founding Institute Director Professor Fiona Stanley at the end of 2011. Named as Northern Territory Australian of the Year for 2008, Professor Carapetis has been Director of the Menzies School of Health Research in Darwin since 2006, where he forged new directions in research and training to tackle the big problems in Indigenous health.

SVA expanding in WA

Social Ventures Australia (SVA) continue to expand their presence in Western Australia, with the Western Australian Department of Communities selecting an SVA led consortium as the preferred respondent to establish and operate the much anticipated Western Australian Social Enterprise Fund.

The Private Ancillary Fund (PAF) Service offered by SVA, headed in WA by Simone Eley, is to be rebranded 'Australian Philanthropic Services', with a view to provide greater focus to this service and accelerate expansion plans. Offering full establishment and ongoing administration services, as well as grant making and evaluation services for PAF trustees, Australian Philanthropic Services will play an important role in supporting the development of giving in WA. And as a Perth local who has always played an active role in the community, Simone is well placed to understand the nuances of WA philanthropy.

To find out more, email Simone at seley@socialventures.com.au *www.socialventures.com.au*

Myer Family heads West

The Myer Family Company
www.mfco.com.au

Having recently established an office in Perth, headed by Julian Butler, The Myer Family Company (MFCo) provides professional services to assist high net worth families and charities in particular with estate and succession planning, accounting and tax management, investment services, traditional trustee services, philanthropy and matters addressing compliance and governance.

Peter Winneke, MFCo's Head of Philanthropic Services, will be running Philanthropy Australia's foundations and governance workshops in Perth on Tuesday 22 May. Having established nearly 70 family foundations in recent years, and worked with many of these families to establish a strategic giving program, Peter has been a regular visitor to Perth in recent months.

http://www.philanthropy.org.au/workshops-seminars/paf-workshop.html#calendar

Sidney Myer Fund/Myer Foundation
www.myerfoundation.org.au

As a national funder, the Sidney Myer Fund and The Myer Foundation have a long history of support in the West, committing approximately $6 million over more than 220 grants. Grants have been made across several program areas, including Education, Poverty and Disadvantage and Arts and Humanities.

In February 2012, the Sidney Myer Performing Arts Awards were held at the new State Theatre Centre of Western Australia. The national awards were created in 1984 by the Trustees of the Sidney Myer Fund to enhance the status of the performing arts in Australia.

The Trust Company opens in Perth

Australia's oldest independent trustee, The Trust Company, has established an office in Western Australia. Mr. Ravi Malhotra, State Manager in Perth, describes the impetus behind the expansion as a clear opportunity to leverage the increased economic activity associated with mineral wealth to enhance social and economic capacity.

The Trust Company, through its Native Title Trustee services, is dedicated to making a real difference to Aboriginal communities by working closely with the specific Aboriginal groups who receive monetary benefits through Trust structures. Within the native title system, opportunities exist for Western Australia's traditional owners to achieve economic improvement through negotiations with the extractive industry.

Ravi can be contacted on rmalhotra@thetrustcompany.com.au or visit *www.thetrustcompany.com.au* for more information.

Members of Philanthropy Australia

New Members

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

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Crawbuck Foundation
5Point Foundation
Shaun & Bernadette Flannery
Fleurieu Community Foundation
Fremantle Foundation Limited
Give Where You Live Foundation
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Believe Foundation
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Community Sector Banking
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Support Act
UnitingCare NSW.ACT
University of Southern Queensland
YWCA NSW

Philanthropy Australia would like to acknowledge the support of:

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