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From Little Things Big Things Grow:
The Role of Small Grants



Philanthropy Australia is the national peak body for philanthropy and is a not-for-profit membership organisation. Our Members are trusts and foundations, families and individuals who want to make a difference through their own philanthropy and to encourage others to become philanthropists.

Our vision: A giving and caring nation.

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

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

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

Our front cover features members of the Gaeta Rural Fire Brigade testing their new mop-up unit in the Burnett Ranges near Mount Gaeta in Southern Queensland. The Brigade were awarded a \$3,900 grant, sourced from Perpetual Trustees to purchase a mop-up unit to provide an immediate response to wildfires and assist in hazard reduction burns.

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Editor: Louise Arkles
Assistant Editor: Mary Borsellino

Design and production: MDM Design Associates
25 William Street, Richmond Victoria 3121
Telephone: (03) 9429 1177 Email: mdm@mdmdesign.com.au

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From Little Things Big Things Grow: The Role of Small Grants

Jeanne Orr's - Reichstein
Foundation
Source

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“There is increasing anticipation that trustees of foundations and trusts will be expected to meet the same level of governance standards that are imposed on public companies, and over time foundations and trusts will be required to provide more information publicly.”

From the President

Bruce Bonyhady, President

At the Philanthropy Australia Annual General Meeting in April 2007, I presented a draft *Vision, Mission and Strategic Plan: 2007-2011*. We committed to consult with interested trustees of our Members to ensure that in setting this strategic agenda for Philanthropy Australia, Council would be meeting your expectations as your peak body and the representative of the philanthropic sector.

Our aim was to finalise and publish the *Vision, Mission and Strategic Plan: 2007-2011* during the third quarter of this year.

I would like to thank the trustees for meeting with Gina and me, for your engagement on this important issue and constructive comments during the past few months of consultations.

At Council's meeting on 23 August all the feedback and comments from trustees were considered and the final version of Philanthropy Australia's *Vision, Mission and Strategic Plan for 2007-2011* was approved. It is now available on the Philanthropy Australia Website.

The recent consultations and discussions with trustees have also given Council a very important opportunity to gauge Members' perspectives on the priorities within the new framework set by the Strategic Plan.

Transparency and reporting by foundations and trusts were both the most pressing and contentious issues raised in our discussions. A wide variety of views were expressed, from the need for privacy by some individual and family foundations, through a view that foundations are private funds for public purpose, to some who believe that with special tax concessions comes a requirement to report publicly.

For most trustees there is a recognition that, in line with the enhanced scrutiny of the duties and responsibilities of public company directors, there is increasing anticipation that trustees of foundations and trusts will be expected to meet the same level of governance standards that are imposed on public companies and over time foundations and trusts will be required to provide more information publicly.

During these discussions trustees highlighted the need for increased information, particularly technical and legal information, and it became apparent that we have a significant gap in the provision of resource materials and information on trust and foundation governance. As a result one of the most significant priorities identified in the strategic process is in the key area of governance.

Consequently, in the *Vision, Mission and Strategic Plan: 2007-2011* we have substantially reviewed the intended outcomes under governance to encourage trustees of our Members to maintain sound governance policies and practices and to report regularly on the outcomes of their philanthropic contributions. We have also added an outcome under governance on effective education and professional development for Members and the sector more generally.

In the next year, again in consultation with Members, we will develop best practice governance guidelines and practices for use by all and put in place an effective professional development program for trustees.

We will also lead a consultative process to discuss and determine voluntary reporting standards for foundations and trusts and encourage adoption of these standards throughout the sector.

I am looking forward to working closely with Council and Members as we implement the Strategic Plan and build a stronger philanthropic sector together.

I commend Philanthropy Australia's *Vision, Mission and Strategic Plan: 2007-2011* to Members.



“Many trustees feel that the explicit articulation of ‘voice and influence’ in our definition of philanthropy is a key difference between giving a donation and philanthropy.”

From my Perspective

Gina Anderson, CEO

In August 2006, under the guidance of Lady Southey, the former President of Philanthropy Australia, Council commenced development of a five year strategic plan for the organisation. On becoming President, Bruce Bonyhady led this strategic review and concluded with a series of consultations with Members for feedback and endorsement.

This process proved to be time consuming and resource intensive for Councillors and staff. However, the cumulative discussion and understanding for all involved and the resultant clarity of purpose and direction is proving to be extraordinarily worthwhile.

We began our process by reviewing the key trends affecting philanthropy and the not-for-profit sector and the resultant very dynamic phase we are now enjoying. This prompted a complete review of our vision and mission, who we are and what we do. Over the last 12 months there have been many robust and forthright discussions as Council wrestled with defining what we do and who we represent.

In articulating our mission “To represent, grow and inspire an effective and robust philanthropic sector for the community”, Council agreed to the inclusion and critical positioning of the word ‘represent’. Council was mindful that the explicit reference to ‘representing’ Members would probably continue to preclude Philanthropy Australia from receiving DGR status. However Council reaffirmed that the primary role of Philanthropy Australia is to represent its Members.

This discussion then led to who should be Members, and particularly the vexed question of those corporations

and businesses that have significant community investment and workplace-giving programs, but do not have a foundation. Concerned by the potential confusion of philanthropy with the much wider corporate social responsibility, and the reality that we do not represent corporations and business, Council confirmed that those who are eligible to be Members of Philanthropy Australia are grantmakers who are:

- trusts, foundations and organisations whose prime objective is as a grantmaker that distributes to non-related entities and which have a separately constituted board;
- trustees and trustee companies in their capacity as trustees of trusts and foundations;
- individuals; and
- families.

Council further determined that those who are eligible to be Associates are individuals and organisations that support the vision and mission of Philanthropy Australia, including community organisations, associations, research institutes, universities and other interested parties who want to become involved with Philanthropy Australia.

After some 10 months of deliberation by Council to formulate a draft Strategic Plan, we sought feedback from groups of trustees on Philanthropy Australia’s proposed direction. Four meetings were held in Melbourne, two meetings in Sydney and one meeting in Perth. In addition a number of meetings with individual trustees unable to attend the group meetings were held in Melbourne, Brisbane and Sydney.

This certainly proved to be a worthwhile initiative as we have gained a great deal of constructive feedback and consequently a much greater understanding of the issues about which our Members are concerned. There was a lot of discussion on the need to continue to develop our Affinity Groups and the need for more guidelines and tools for Prescribed Private Funds. There were also suggestions around a more proactive media strategy and a number of trustees also asked for information on how to further engage other trustees in understanding the social and environmental issues their foundation is tackling.

At all meetings and conversations there has been a very positive reaction to our definition of philanthropy, particularly to the inclusion of ‘voice and influence’. I think many trustees feel that the explicit articulation of ‘voice and influence’ in our definition of philanthropy is a key difference between giving a donation and philanthropy.

Trustees were generally very pleased with the four key areas of: Representation; Grow and Inspire; Effectiveness; and Governance; and the listed priorities and intended outcomes. Several specific suggestions on intended outcomes put forward by the trustees have been included in the final Strategic Plan.

Clearly outlining who we are, what we do and who we represent has already helped us all, Council and staff of Philanthropy Australia, to articulate to the wider community why we exist and what we aim to achieve.

Aiming for impact: The R. E. Ross Trust

By Sylvia Geddes, Executive Officer, The R. E. Ross Trust

The R. E. Ross Trust is considered, in the Australian context, a large foundation, featuring on Philanthropy Australia's '15 largest foundations' list and disbursing approximately \$4.1 million per annum. With the current international trend towards foundations making fewer, bigger, 'strategic' grants to selected organisations, you might assume that the Ross Trust works in this model; however, this is not the case.



Sylvia Geddes.

In December 2006, The R. E. Ross Trust changed its granting guidelines to express its priorities in terms of the impacts the Trust aims to make:

- (a) Improvement of social and economic outcomes for the most disadvantaged and vulnerable people in Victoria.
- (b) Improvement of outcomes for children in their early years.
- (c) Improvement of access to and achievement of equity and excellence in public education.
- (d) Protection and preservation of Australian indigenous flora and fauna.

By using the word 'impact' the Ross Trust is saying that it wants to be sure that the money it gives will make a real, positive change in the circumstances of the intended beneficiaries. The decision to adopt an impact driven approach did not arise from a view that large grants achieve better results than small grants. In fact, quite the contrary. The Ross Trust is of the view that achieving a positive impact is independent of grant size: grants of all sizes from small,

one-off grants through to large multi-year grants can achieve positive impacts if the resources available to be applied are adequate to the tasks required.

The size of a needed grant is much more related to the purpose for which the grant is to be used than the positive impact to be achieved. By purpose, the Ross Trust means for example, a project, a program, development of an organisation's infrastructure, organisational capacity building or salaries. In a sense the Ross Trust doesn't care what the money is used for, as long as it can be demonstrated that it will be used to produce the impact the Trust and the grant applicant want to have.

Impact means real change, independent of grant size

Clearly a small grant is not going to be of much assistance if the task is to change a whole system of service provision to benefit a large population group or to cover a large geographic area. But if the impact being sought is a minor improvement in the quality of life of a small group of people experiencing some form of localised disadvantage, the cost of making the change will be a lot less and a small grant may be just what is needed.

In assessing a grant's potential impact, the Ross Trust considers factors such as the nature of the impact being sought, the number of people who will be affected, the size of the population groups and geographic areas involved, the time required for the impact to be felt and the flow-on effects to others.

If the desired impact is improving the opportunity for children aged 0-5 to have optimal developmental experiences, both a \$2,000 grant to a toy library and a multi-million dollar grant to the Centre for Community Child Health to roll out a six year Linking Schools and Early Years project can achieve the impact. Both grants are worthy although they differ in population and time scale.

Our smallest grant in recent years was \$230 to a group of older citizens who needed some crockery and cutlery. This seems like an inconsequential grant but the impact it had on the beneficiaries' quality of life was substantial. When you think beyond the dollar figure, about what access those people had to recreational facilities or social engagement, living as they were in an outer suburb with its attendant transport and mobility problems, to create the opportunity to socialise over a meal, building relationships and social engagement, the impact on their quality of life was significant indeed.

It was considerations such as these that led the Ross Trust to determine that there should be no minimum or maximum limits imposed on the grant amounts which applicant organisations could seek.

Small grants for small rural communities

In 2002 the Trust decided to join with the Foundation for Rural and Regional Renewal (FRRR) and other donors to establish the Small Grants for Small Rural Communities Program. This initiative of The William Buckland

Foundation now distributes over \$500,000 in grants each year. The Ross Trust currently contributes \$75,000 each year on a rolling three year basis.

As the Ross Trust wants to fund small rural communities, but does not have the capacity to visit every rural community to find out what their needs are, this approach suits us perfectly. Equipping one body, in whose professionalism we have confidence, with a pool of money to do this work – to facilitate communication about available grants to rural communities, undertake research and investigative work, select worthy applications, and administer grants – on the Trust's behalf, is a terrific solution.

Responsiveness

In not placing limits on the size of grants or the purposes for which they can be used, and in choosing to accept unsolicited grant applications, the Ross Trust is deliberately making itself as responsive as possible to any organisation aiming to achieve the positive impacts sought by the Trust. The capacity for responsiveness that this approach allows for is crucial.

Because foundations are so small in their capacity – for example, here at the Ross Trust we have five part-time staff – how can we possibly know what is going on out there in the community? How do we know that organisation 'X' has come up with a fantastic idea with the potential to have a substantial impact in their local or even wider community? If we ruled out unsolicited grants below a certain amount, we would be ruling out some excellent initiatives that might deliver important impacts.

For example, in October 2001, the Ross Trust granted \$10,000 to Bass Coast Youth Services to develop an Independent Persons Program: the statutory role of Independent Persons is to attend a police interview with a young person under the age of 17 years if a parent or guardian is unavailable.

A training program was established in cooperation with Victoria Police, which was later used to train all existing Independent Persons as Community Corrections Volunteers and Corrections Work Site Supervisors. The program was later extended to bail advocacy and renamed the Youth Justice Program, which in turn led directly to the creation of the Association of Honorary Independent Persons (Victoria) Inc. In July 2004, the Ross Trust granted \$8,100 to the Association to extend its operations throughout Victoria and update its 'Youth Reference and Resources Manual', developed with the earlier Ross Trust grant. The roll-out from the initial small grant has been very gratifying.

If you think of it in a business context, an entrepreneur or a small start-up doesn't begin with a fully fledged business, there are a whole raft of steps before a company can list on a stock exchange.

Change or charity

Looking at the history of charity – a word with negative connotations for many people today, but not for me – the role of philanthropy was to fill gaps and the Ross Trust considers that charitable trusts still ought to be doing that. One school of thought is that 'charity' is beneath us, a bandaid, a waste of money, and charitable trusts and foundations should only be supporting prevention and promoting social and policy change – the old 'fence at the top or ambulance at the bottom' argument. My personal view is that this conception is flawed, based in part on an incorrect assumption that Australian charitable trusts have a greater degree of capacity and flexibility of purpose than is actually the case.

The fact is that charitable trusts are not government agencies or major institutions. In the case of charitable trusts like the Ross Trust, the Trust is not even an organisation – it is the five trustees who hold in trust the money gifted by the benefactor. Under law, their

responsibilities to manage and distribute the invested funds are clear. The capacity to behave as if a charitable trust is an independent organisation depends on the provisions of the legal instrument by which it was established.

It's worth considering what has brought about this belief that foundations need to do something more, something bigger than be responsive to community needs. One factor relates to the new professionalisation of philanthropy in Australia. There are now more trusts and foundations with staff – staff who themselves are more career-oriented, more intellectually engaged in debates about social policy and grantmaking. Trustees and staff have become more aware and informed, including about practice in the USA and UK, more thoughtful and engaged, reading the professional literature and talking to colleagues. To some extent this has generated a self-fulfilling prophecy, that if you engage highly professional staff they'll want to learn and do new things.

An example of the consequences of the 'change not charity' approach has been the retreat of charitable trusts in recent years from providing grants for emergency relief and material aid. The Ross Trust is one of the few trusts that is still giving, very significantly, for this purpose and regards it as a strategic intervention to prevent and alleviate poverty.

A multiplicity of approaches

The community needs its charitable trusts and foundations to take a multiplicity of approaches which include making grants of all sizes, accepting unsolicited applications, initiating major strategic interventions, acting as enablers and convenors, and promoting positive social change. In my view it would be very sad indeed if all foundations chose not to accept submissions or make small grants because that would exclude a myriad of potential important impacts which need to be encouraged and supported for our communities to thrive.

Small grants in small rural communities

By Jo Mason, Grants Manager, Foundation for Rural and Regional Renewal



The Bute RSL was awarded \$3,000, sourced from Perpetual Trustees, to modernise the clubroom. The local council provided earth moving equipment, community providers supplied the filling sand and volunteer labour prepared the floor. The clubrooms are now used for youth activities and provision of meals for tourists.

Meeting a need

The Foundation for Rural and Regional Renewal (FRRR) is the only national organisation offering small, non-matching, discretionary grants to small regional communities in all states and territories.

The Small Grants for Small Rural Communities program focuses on communities with a population of up to 10,000 people, providing grants of up to \$5,000 to not-for-profit organisations. Projects must be for a charitable purpose and offer clear public benefit for communities living in small rural and remote locations, contributing to their development in social and community welfare, economic, environmental, health, education or cultural areas.

The program was developed to cater for the needs of rural and remote communities, therefore the main features of the program are:

- a simple application form;
- straightforward guidelines;
- a 1800 telephone number for grantseekers;
- website support;
- simple acquittal procedures; and
- acceptance of handwritten applications.

Collaborative origins

The program is a result of a collaborative partnership between The William Buckland Foundation, Perpetual Trustees, The R. E. Ross Trust, The Pratt Foundation, The Myer Foundation, the Department of Transport & Regional Services, The Ian Potter Foundation, The Sarah and Baillieu Myer Family Foundation, the Becher Foundation and the Foundation for Rural and Regional Renewal (FRRR) which makes a financial contribution and administers the program on behalf of the partners.

FRRR is ideally placed to administer the small grants program on behalf of the partners, as our mission is to champion the economic and social strength of Australia's rural and remote communities through partnerships with the private sector, philanthropy and governments. We have wide grantmaking powers which put us in a unique position to assist rural communities as we can distribute deductible gift recipient (DGR) funds to non-DGR organisations, and do not require matching funding. It is this ability that makes the program so effective, as the lack of organisations with DGR status in rural and remote communities has hampered funding to community projects for many years.

We know the program has been highly effective as an independent evaluation revealed that 74 per cent of recipients reported leverage of additional funds and/or volunteer commitment as a

direct result of the small grant received. 78 per cent of recipients indicated that the grant made a significant difference, and 66 per cent said the project would not have happened without the grant. Our experience is that the receipt of small grants frequently improves community confidence and encouragement to continue voluntary efforts within small communities.

FRRR welcomes new partners to the program and if you would like to learn more about the Small Grants for Small Rural Communities program please contact Sylvia Adams, CEO on (03) 5430 2305 or visit the FRRR website at www.frrr.org.au. Copies of FRRR's regular newsletters and its latest Community Report are available by contacting FRRR.

Case Study 1:

Boosting the social heart of a small town (South Australia)

Bute RSL Club – \$3,000

Source: Perpetual

One regret John Pridham has is that he didn't find out more about his father's war experience when his father was alive. But the revival of the RSL Club in his home town of Bute, west of Clare on South Australia's Yorke Peninsula, has given him another way of making a connection with his father's life. Beleaguered by waning interest from ageing members and with its premises run down, the club in this farming town of 300 people was facing closure. John and his fellow townsfolk decided they couldn't let that happen. With funds from FRRR they stripped an old room at the club, laid down a concrete floor, covered it with lino and made a meals area. Then they began serving meals to tourists coming to Bute by train on Sundays. Locals began turning up for meals too. Long-forgotten medals and war mementoes have been dug out and framed for the club walls. The spin-offs have amazed the Pridhams. This year the town held its first ANZAC Day march; 480 people came. Many stayed for the celebrations at the RSL. "We had the most wonderful day," says John's wife Linda. Now there are plans to apply for another grant to continue the club's overhaul.



Dongara drive-in.

FRRR liked this project because it helped a small community revive its social heart and inspired renewed involvement among younger people.

Case Study 2:
Reviving the drive-in (Western Australia)
Shire of Irwin – \$3,000
Source: The Ian Potter Foundation

Just two drive-in theatres remain in Western Australia. One at Dongara, south of Geraldton, is run by teenagers. "If we run a new release film, it's pretty much packed out and we have up to 100 cars," says volunteer youth group coordinator Natalie Mawer, 19. The drive-in had closed when the Shire of Irwin's Youth Advisory Council in the coastal town of 3,500 people suggested it be re-opened. Since then the Dongara Youth Group has issued tickets, manned the gates, run the café and offered car window cleaning on film nights, usually held on long weekends and school holidays when the popular tourist area is inundated with visitors. Funds raised from the film nights have helped build a skate park and a BMX track. "On a good night we can raise up to \$3,000," says Natalie. "We have an absolute ball and the next night we might go out together using the funds." A storm three years ago smashed the screen. The shire rebuilt it and the youth group took the opportunity to upgrade their projector with help from FRRR.

This project illustrates exemplary initiative and leadership on the part of the young people of Dongara/Port Denison who raise funds for municipal projects doing something they enjoy.

can also use the radio to talk to the school bus drivers if needed and the beauty is we don't have to buy anything else to make it work." Sandra says the school has been aware of drought's impact. "Getting the grant has added to the community's morale because we feel we are not forgotten."

This school was innovative with a project that helped children improve reading, writing and speaking skills while providing joy in the surrounding farming community.

Case Study 4

Providing Jobs for Special Needs Workers (South Australia)

Kingston Supported Employment Service – \$3,000

Source: Perpetual

Gianni Spada's family moved from Naracoorte to Kingston, about 100km west, so Gianni, 32, could work in the Kingston Supported Employment Service there. Gianni and his 12 work colleagues have high support needs and require constant support and supervision. Gianni mows lawns with the service's Kingston Lawn Rangers. The service has a ute and trailer, two ride-on and four push mowers and a whipper snipper, but until FRRR's grant, they had no on-site storage. Now they do: a shed with a concrete floor now doubles as storage and a maintenance training area. The service's manager June Alexander, who has worked doggedly to make the business profitable since federal government disability funding reforms were introduced in 2002, says the business is a big team effort that gets lots of local support but sometimes feels forgotten or overlooked because it's regional. "Our main job is to employ people with disabilities. We have to run a profitable business so we can buy all our equipment but the shed was something extra and a grant like this is invaluable. The service is paramount to the town. We have 1,600 people here: 800 live in the town and 800 live nearby. Our nearest town is 100km away and there is no public transport so if our clients couldn't work here, they would have no work." Gianni concurs. "It's important we have mowing jobs to do," he says. And a shed. "It's a very good shed," he says.

Case Study 3:
Encouraging kids to take to the airwaves (New South Wales)
Tallimba Public School – \$788

Source: FRRR

Drought has tested the mettle of those in the tiny town of Tallimba, two hours north of Wagga. Wheat and sheep farmers whose children attend the primary school have survived on hope for some years. At the 28-student school, a UHF radio show broadcast by the kids each Friday has been a bright spot during lean times. Using the school's FRRR-funded UHF radio, the Grade 3 to 6 kids present a 15 minute show called 'Tallimba Talks to You'. It features community and school events, book readings and short stories. The kids prepare the scripts and present the show. Sandra Leslie, a teacher's aide and office worker who lives 12km from the school, says farm households tune in religiously. "The children learn about public speaking. In emergencies we



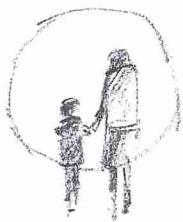
Each Friday lunchtime, a group of Tallimba Primary School students prepare scripts and perform a 15 minute community radio show called Tallimba Talks to You (TT2U) thanks to an FRRR grant of \$788. The school purchased an UHF radio to support a literacy program for Grades 3-6.

Highly motivated and with strong local support, the Kingston Supported Employment Service appealed to FRRR as a worthy recipient because of the nature of its work and the dynamism behind it.

From little things big things grow: The role of small grants

By Helen Cook, Secretary, The Walter and Eliza Hall Trust

The Walter and Eliza Hall Trust was established by Eliza following the death of her husband Walter in 1912. Eliza provided 1 million pounds to establish the Trust with the express aims to relieve poverty, advance education, assist the Anglican Church and to benefit the community generally. For nearly a century the Trust has assisted tens of thousands of individuals, families and organisations in their time of need.



Chairman of the Walter and Eliza Hall Trust, John Chatterton believes that the real benefit of the Trust's small grants program is that it fills a gap not covered by Government or other charitable organisations. We seek and receive a good deal of feedback from social workers and health professionals, as well as the individuals and families we support, and are confident that the type of small grant assistance we provide does have a significant impact upon the quality of life and wellbeing of those we are able to assist. Providing funding for an electric hospital bed, for example, may enable a family to continue to care for a loved one who is disabled, or has a chronic illness and this may prevent the need for possible nursing home placement.

There appears to be a tendency to move towards the big preventative, curative and research programs, and away from the less attractive areas involving the direct relief of poverty, and crisis relief in particular. The big programs are necessary, but regardless of how successful they are, there will always be many people who fall by the wayside and find themselves in desperate need. We believe that some help should be available to them in these circumstances, and so that is where we direct our efforts.

The requests we receive are many and varied, but here are a few recent examples of assistance we have provided:

- we helped a single mother with small children, one being disabled, remain in

their home by assisting with payment of rental arrears and outstanding utility bills;

- we helped with school expenses for a teenager whose only surviving parent recently died after a long battle with cancer;
- we helped to pay for an electric wheelchair for a young woman suffering from Multiple Sclerosis;
- we helped to buy an electric scooter for a double lower-leg amputee;
- we helped to buy a washing machine for the mother of a severely autistic teenager who required many changes of clothes each day; and
- we helped to pay for motor vehicle modifications for a young man who is a paraplegic as the result of an accident.

We are very fortunate to have a small number of generous benefactors, including the Vincent Fairfax Family Foundation and the Margaret Augusta Farrell Trust who have been long-time supporters of the Trust's small grants program. Funding from these two sources, as well as significant support provided by an anonymous donor, enables us to continue to provide financial assistance to this particular target group. Over the 2006-2007 financial year the Trust allocated some 300 separate grants with a total value of close to \$250,000. The effect of a grant of \$500 or so can be far reaching – consider a family of five who are about to have their gas or electricity disconnected, and the number of people who benefit quickly adds up.

Running a small grants program can be demanding due to the level of administration involved. There is often a need to contact applicants for additional information as Trustees must be confident that Trust funds are being allocated to those who are in greatest

need. Unfortunately, of the 500 or so applications received, we only have the financial capability to assist around two-thirds of requests. It is in direct response to this level of unmet need that the Trust has recently launched The Survival Fund, a vehicle by which donations from the wider community can be accepted. These funds will be used to expand the Trust's already successful small grants program.

It is hoped that an opportunity to partner with a business or large corporate may arise in the future. However, to date the Survival Fund is yet to strike a chord with the community, as the plethora of charities clamour for limited charitable dollars. There are any number of reasons as to why this is so – while we do excellent work we are not well known as compared to those 'top-of-mind' charitable organisations. The fact that we provide assistance in the area of poverty relief is also a challenge. We believe that many of us feel comfortable donating for cancer research, children's hospitals and the like, but that buying a washing machine for a single mother with a severely disabled and incontinent child is just too confronting! Or maybe the wider community is just unaware of the severe disadvantage that exists in Australia.

It is a fact that many individuals and families in Australia today are affected by poverty and are struggling. Many are always just one step away from a crisis, and when it occurs they have no financial reserves to deal with it. The Walter and Eliza Hall Trust has a continuing commitment to help those experiencing financial hardship, and with almost a century of service to the community, the Trust looks forward to another 100 years of helping those in need.

More information on the Trust and its latest fundraising initiative The Survival Fund can be found at www.wehalltrust.org.au or www.thesurvivalfund.org.au

Bigger is not always better! The RACV Foundation

By Chris Wootton, Executive Officer, RACV Foundation

The issue faced by many foundations is whether or not to increase the funding level of their grants, based on the assumption that bigger grants are better – improved outcomes, leveraging and profile. But is this the case, or just another urban myth?

Small grants are not only small in size (i.e. <\$10,000) but also may include the following characteristics¹:

- target small and/or community-based organisations;
- seek to affect social change at the local level;
- focus on capacity building and institutional support of beneficiaries; and
- encourage greater dialogue and collaboration between grantmakers and beneficiaries.

The RACV Foundation has awarded 260 grants worth just over \$1 million since it was established 10 years ago, making an average grant of around \$3,900. At its inception, the Foundation made a conscious decision, based upon limited funds available, to try to support as many organisations as possible to assist those in need in the community.

While larger grants may tend to grab headlines or be perceived as leading to better outcomes, small grants are effective as agents of positive social change at the grassroots level and they generally are more relevant and adaptable to local needs. They can also be more effective in leveraging funds, accessing volunteers, developing local partnerships and piloting demonstration projects².

A similar finding has been found with sponsorships, that small sponsorship projects have been more cost-effective in achieving health promotion outputs than larger projects. It was found that annual sponsorship amounts as low as \$5,000 or less were the most cost-effective means of generating exposure of club members to smoke-free venues, healthy food choices and other structural reforms (Corti *et al*, 1995a as cited in D'Arcy, 1996). For many, an amount as little as \$5,000 was the single largest item of revenue that they have ever received. Thus, these funds have resulted in considerable purchasing power³.

True efficiency (cost per unit product) is often relatively low in large grants⁴. Other surveys also conclude that other things being equal, allocating funds



Participants from the 2007 Loddon Murray Community Leadership Program recently visited Melbourne as part of their 23 day inspirational and skill development program – supported by the RACV Foundation. Participants come from remote and rural communities in north central Victoria.

toward smaller organisations might deliver wider social benefits. A UK Health Review concluded that the biggest impact can be obtained by funding proposals that come from smaller organisations that lack the in-house resources to proceed in the absence of outside support⁵.

However, the down-side of small grants often involves the costs of processing, both for the applicants and the grantmaking body, especially if the grants are small in size and the success rate is low.

As grantmaking bodies become more mature and staff/boards more experienced, goals tend to become more focused and decisions made as to where larger grants could have the most impact, (i.e. where they would serve as catalysts for government or private activity on a much greater scale and improved outcomes).

In many ways, the whole question of large versus small grants is not really a choice at all, but a combination that more reflects programmatic and pragmatic implications. In Australia there are around 700,000 community organisations (19,485 with DGR status); they employ over 600,000 people, most with budgets under \$1 million. Community volunteering, a key component of most community organisations, has also been valued at an estimated \$42 billion a year⁶.

Given this profile of community organisations in Australia, small grants must play a significant role in nurturing small organisations and fostering community development at the grass-roots level. Small grants should

also be seen as a means to an end. The goal of any small grant is the 'graduation' of the grantee to larger and more sustained funding. The challenge for small grant providers is how to encourage groups to develop the capacity to leverage new and sustained future funding and how to simplify the process, so that paperwork costs and wasted efforts are minimized.

At the same time, foundations, as they mature and grow, not only need to continue with small grants, but also need to look at ways of making a contribution to the national agenda, via partnerships and a small number of larger grants in their funding mix.

In conclusion, while bigger is not always better, a mix of both small and a few larger grants appears to provide the most effective community outcomes.

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The small differences making a big change: Supporting Australian artists

By Jane Haley, CEO, Australia Business Arts Foundation

The Australia Business Arts Foundation (AbaF) was recently contacted by a woman who wanted to give her elderly parents an unusual birthday gift. She donated several hundred dollars to AbaF's Australia Cultural Fund, and invited her parents to select one or more of the arts projects registered with AbaF, which could then be nominated for a grant for that amount. This thoughtful gift allowed her parents to make a significant contribution to an artist's professional development.

Grantmaking is just one facet of AbaF's business. In 2006-2007 AbaF made 160 (predominantly small) grants worth almost \$1,045,000 to artists and cultural organisations around Australia. More than 70 per cent of these grants were for less than \$10,000.

These grants are only possible because individuals, businesses and foundations and trusts are making donations to AbaF, expressing a preference for an artist or arts organisation as the recipient.

AbaF acts as an intermediary – accepting donations (and providing tax deductible receipts); checking the credentials of artists; and making grant payments for specific projects (administering simple grant agreements requiring acquittal reports at conclusion).

The artists and arts projects registered with AbaF are either individuals or smaller arts groups that do not have Deductible Gift Recipient (DGR) status. This means that AbaF's grants often help young or emerging artists, for whom a small amount of money can make a big difference – as the examples on these pages demonstrate.

The kinds of projects made possible through a small grant include:

- the development of educational material to support documentary films (\$2,500 to Steve Thomas for *Hope*, \$9,100 to Melanie Hogan for *Kanyini*);



'A porthole in the minds of the vanquished' received a grant assisting them to perform in the 2007 Edinburgh Fringe Festival.

- the marketing and publicity of a book (\$5,000 to author Susanna de Vries for marketing and publicity of *To Hell and Back: the banned account of Gallipoli and Sydney Loch*); and
- relocation and initial living expenses for overseas professional development (\$10,000 to Linda May-Han Oh for the Manhattan School of Music).

AbaF offers an online register of arts projects from which potential donors can choose. We are in the process of expanding this service but at present there are around 30 projects – including film, literature, visual arts, theatre and

music. You can view them at <http://www.abaf.org.au/giving/acf/registeredprojects.html>

One of the great results of AbaF's fund is the encouragement and support of talented young writers, artists, theatre producers and filmmakers, often at a critical stage in their career. As we all know, philanthropic support is not only about the money, it is also about recognition and endorsement – a grant confirms that the recipient is doing work that is seen to be of value to the community.

A grant can also provide the incentive for an artist to keep making new work, which is an essential component of a healthy cultural life. As WA-based independent producer, Suzanne Ingelbreacht recently said: "We managed to cover our costs to stage our play thanks to support from a grant, and this has encouraged me to continue taking financial risks with theatre".

The number of grants made annually by AbaF has grown dramatically in the space of a few years. We are reaching a lot more artists with information about the fund and, in turn, there are more and more donors making connections. Administering and tracking the results of these grants and responding quickly to interest from donors is a key factor in the success of the scheme and also one of our big challenges. We are upgrading our website to incorporate an online donating facility.

Running a small grants program has taught us a lot about donor motivations. We have seen how much people enjoy giving when they can put a face to the recipient of their gift and see the real difference their donation is making – whether it is helping artists get on the world stage, continue presenting chamber music, run community arts workshops, publish a book or create thought provoking and life changing theatre.

Example: Taking Australian plays to the Edinburgh Fringe Festival

The Edinburgh Fringe, the world's largest arts festival, takes place in Scotland's capital during three weeks every August. The Fringe is well-known as a showcase for experimental works and Australian theatre makers are keen to have their shows included in the program. It is an expensive exercise getting a team of Australian performers to Scotland and transportation of sets, costumes and accommodation costs.

“Running a small grants program has taught us a lot about donor motivations. We have seen how much people enjoy giving when they can put a face to the recipient of their gift and see the real difference their donation is making.”

The artists were responsible for raising funds themselves for the project and received ongoing advice and support from AbaF. Claire Glenn says: "After a few days of low ticket sales we received an elusive five star review in *The Scotsman* and since then we've been playing to mostly full houses every night. We were also nominated for a Fringe First Award and we have had a

Example: Jessica Dean and Anthony Hunt

Many artists working with AbaF raise money over a period of time to contribute to the costs of studies, and small grants are an important part of the picture.

South Australian-based soprano Jessica Dean and her husband, conductor and repetiteur Anthony Hunt, have been accepted into the Royal Academy of Music in London, from September 2007. Both artists have received Arts SA Emerging Artists funding, and will use overseas studies as an opportunity to develop their skills, build new industry contacts and gain performing experience. Dean and Hunt have received partial tuition scholarships and have also been supported with a grant of \$8,250 through AbaF – one part of the jigsaw puzzle of support which gets them overseas.

“A grant can also provide the incentive for an artist to keep making new work, which is an essential component of a healthy cultural life.”

Two acts which have been supported with small grants through AbaF, Ansuya Nathan's *A Porthole into the Minds of the Vanquished* and Claire Glenn and Charlotte Strantzen's *An Air Balloon Across Antarctica*, have been included in Fringe 2007.

While the grant of \$3,000 to Ansuya Nathan covered partial costs of airfares for the team of three, it made a significant difference in the overall budget and gave them an enormous boost.

An Air Balloon Across Antarctica is a quirky play which tells the story of a female explorer travelling across Antarctica in a hot air balloon to scatter her son's ashes, accompanied by Ham, a lemming trapped in a hamster's body. The grant of \$500 to this production was considerably smaller, but provided encouragement and support to the team.

number of promoters in, including the Warehouse Theatre in London, interested in the show." For this air balloon, the sky's the limit.

Example: Out Of The Asylum (OOTA) Writers Group

Out Of The Asylum (OOTA) Writers Group is a Fremantle-based group of writers who meet regularly and support each other in getting work published and performed. OOTA has established *Indigo Journal* to provide a much needed opportunity for Western Australian writers. *Indigo* will be published twice a year, with an expected print run of 700 copies. OOTA will secure published, high profile WA prose and poetry writers as guest editors for each volume to ensure a high standard. The launch of Volume 1 took place in July 2007 and a grant of \$5,500 has helped contribute to costs associated with producing this journal as a quality publication.

Visual artist Sharon Green recently received a grant of \$4,000 to contribute to costs associated with studies at the prestigious Royal College of Art. This grant will not cover all of her costs but it is critical as a base of income on which to build.

About AbaF

The Australia Business Arts Foundation (AbaF) promotes private sector support for the arts and our purpose is to connect business, the arts, donors and foundations through our three program areas – Partnering, Volunteering and Giving.

Further information:
<http://www.abaf.org.au/>

Making it count: Thinking global and acting local with community foundations

By Mary Borsellino, Assistant Editor, Australian Philanthropy

Community foundations are, in a variety of ways, an ideal context for examining the question of whether 'small' necessarily equates with 'inconsequential'. In the broader context of national or even international issues, the economic and social issues which one community faces may seem unimportant, but this comparative smallness of scope makes the problems and concerns no less pressing for those involved. In turn, grants of sizes which would, in other circumstances, be marked as insignificant are often all that's needed to tackle specific local troubles.

Andrew Lawson of the Geelong Community Foundation offers an example of the impact which a very small amount of funding can have, when put to work in the right place: "If there's a child at school who can't afford the uniform or notebooks they need, and their family is given \$50 to cover these costs, then that child's whole future has been re-shaped. They've been given the confidence of looking and feeling like they belong in their classroom, and that confidence will foster a better relationship between the child and their education."

One difficulty which smaller foundations are required to overcome, in their distribution of small and vital grants such as this example, is that although they aren't in a position which allows or requires them to 'work big', they still need to 'work smart'. Fifty dollars can make all the difference in the world, but in order to do so it must be applied to exactly the right cause in exactly the right way. Community foundations in Australia, with their limited size and comparatively humble context, are rarely able to devote the same percentage of their resources to impact studies and problem research as a larger granting body targeting the same fields.

Queensland Community Foundation's (QCF) 2007 grants round was wholly devoted to addressing this particular dilemma, offering six grants of \$10,000 to not-for-profit organisations for the specific purpose of evaluating the work already undertaken by these organisations. QCF has, essentially, given these charities the opportunity



From left to right: The Governor of Queensland, Her Excellency Ms Quentin Bryce AC; Andrew McCafferty – Scripture Union Queensland; Heather Gacia – SPIRAL; Yvonne Amos – SIDS & Kids; Odette Tewfit – Family Planning Queensland; Angela Jaeschke – Access Arts; Alan Barton – Wildlife Preservation Society of Queensland; Dr John de Groot – QCF Chair.

to buy the same school uniforms and notebooks used by their wealthier associates within the giving sector.

QCF brings together government, community and business participants in its support and sponsorship structure. This, coupled with its goal of providing a permanent source of philanthropic funding through an untouched-corpus/distributed-return model, sets the Foundation outside the position typically inhabited by a community foundation in Australia.

These differences of structure and placement have, in turn, led QCF to examine ways in which their grants might fill areas which are otherwise left to languish by more traditionally-shaped funding bodies. In particular, their investment in capacity-building and providing the charities they support with the opportunity to evaluate is an

example of the ways in which a perceptive local eye and a canny application of limited funds can make a significant impact on the organisations involved.

Annie Kirwan, Executive Officer of QCF, explains the process and motivations which led up to the Foundation's 2007 grants round.

"The Foundation was established in February 1997, and it's the oldest of the community foundations in Australia which are built in the charitable perpetual trust style. When we established, we had a corpus of \$300,000 and a dozen or so sub-funds to receive the returns on that corpus. We now have over 125 sub-funds and a corpus of \$20 million; this year our distributions will exceed \$1 million, and that's in addition to the grants from our general fund."

“You could get money to start new projects, you could get money to put sailcloths up, you could get money to send somebody somewhere, but you couldn’t get money to do the regular, ordinary, everyday stuff that kept your core business going.”

“We are fee free. When funds are placed with QCF, there’s no fee taken from them. We are extremely fortunate to have a full sponsorship package from The Public Trustee, Anglo Coal Australia, and QIC – formerly known as Queensland Investment Corporation. All the administration costs and resources required to run us as an organisation are provided. This means that every single dollar donated to our funds is placed into the corpus and can begin working immediately.”

“It’s a pretty luxurious position to be in, to be honest. I’m conscious of the fact that the vast majority of charities have to use a portion of their donations to cover costs. Even generating a receipt for a donation is a cost.”

“So QCF has always been a little bit different, in that our considerations differ from those of other organisations in a similar position. It seemed like our grants would always have to be a little bit different, and I think what we do allows the charities we help to channel a greater amount of their funds into their cause and their community, rather than into the costs of running their organisation.”

“This year we’ve taken the next step in our general growth pattern. The general fund, which was established at the same time as QCF, reached a corpus which could sustain a grant, and the decision had to be made as to how we were going to get that money out to charities and nonprofit organisations.”

“Rather boldly, we commissioned the *Philanthropy’s Future In The Smart State* report. We held seminars and surveys throughout Queensland, asking the question ‘if we were to give out money, where should we give it?’.”

“To go out to all those organisations who clamor – and rightly so – for a grant, to then ask them ‘well, what do you think?’ is a pretty bold step,” Annie acknowledges. “We did that because there are a lot of granting bodies out there, and we wanted to make sure that our grants reached the organisations

that need them and reached them in a way in which they felt the most benefit from it.”

“The report threw up a few interesting points. One of these was that the grant application method, and the grant reporting method, had to reflect the size of the grant. Quite often there seemed to be a disproportionate amount of work put into a grant application for the size of the grant received.”

“Another thing we found was there wasn’t a great amount of funding available for things such as infrastructure, capacity-building, training, and ongoing resources to run the core business. You could get money to start new projects, you could get money to put sailcloths up, you could get money to send somebody somewhere, but you couldn’t get money to do the regular, ordinary, everyday stuff that kept your core business going. We looked at that and decided to think about it carefully.”

“Evaluation is a necessary process, and in any commercial world it would be conducted on a regular basis. As well as being necessary, it’s time consuming and it’s costly, so it’s not something charities can do with the same frequency that the commercial industries can. Conscious of that, we decided to aim our 2007 grants at mid-tier organisations which perhaps do not always have the wherewithal to run

an evaluation but are providing a service out to the community.”

“Our grant application was in two parts. A simple one-page expression of interest, and then a supplementary questionnaire. Based on the replies to that, we selected six recipients – Arts Access, Family Planning Queensland, Scripture Union, SIDS & Kids Queensland, SPIRAL (Supporting People in Respite and Lifestyles), and Wildlife Preservation Society Queensland.”

“They’ll be evaluating programs that have been running in their organisation that have served a wide range of the community. It was a conscious decision to get out there and evaluate programs which really reached across all levels of the community, and which would benefit from the evaluation process. It was also important to us to get right across the state, and not just concentrate on the South-East corner.”

“We’ve asked our grant recipients to provide us with a template of their evaluation procedure. We’d like to be able to offer that template to all charities and we will, with luck, put that on our website and say ‘look, we might not be able to provide funding to each and every one of you, but here’s a template and, if you can find funding elsewhere, this is a good example of how to do it. Because working that out can be the biggest hurdle.’”



Representatives from SPIRAL receiving a grant.

Feature interview: A conversation with Jan Stewart

Jan Stewart is the CEO of Lotterywest, the official state lottery in Western Australia, which turns over about \$600 million per annum. Established in 1933 as the Lotteries Commission, they not only sell lottery games, but also distribute the profits directly to the Western Australian community.



CEO since 1992, Jan spends most of her time managing the business, and is Senior Vice-President of the World Lottery Association, but derives most of her job satisfaction from distributing \$166 million per annum in grants to the WA community. She spoke to Philanthropy Australia's Louise Arkles about making small grants with a very large grantmaking pie.

How did Lotterywest come to be the only Australian lottery to run a grants program?

Traditionally governments set up lotteries as statutory authorities with the purpose of raising money for good causes, but not usually with the intention of making grants. 1931-1932 was the time of the great depression, which saw lots of illegal gambling and huge social needs. Our politicians, as in the other states, recognised the need to control illegal gambling with a regulatory framework, and the opportunity to use all the profits to assist the poor. Those that established the Lotteries Commission (now Lotterywest) had the foresight to build into the organisation the capacity to directly distribute profits to the community.



Well into the 1970s, there were no formal guidelines or selection criteria, and no grant processing structures. A piece of legislation stated the money was to be given to our public hospitals and to worthy causes, and there was a list of potential recipients, but there it ended.

What caused the shift to good grantmaking practice?

In the 1980s, in a climate where there was increasing call for accountability and transparency across government, one of the board members – a very proactive and insightful woman and a fellow social worker – was concerned at the rising profits but the lack of real process to spend it.

The huge increase in revenue forced the trustees to take notice of the grantmaking side, as there was suddenly much more money to give away. In 1986 the Lotteries commission installed their first lotto computer system, which meant that results were available instantly and sales started to soar.

The Commission was making a lot of money, far more than previously. It also formed a consortium of lotteries with other state based lotteries, who pooled some of their turnover to create very large prizes – which made a big difference to us as the population of Western Australia is very small. So it was the size of our revenue which pre-empted the shift towards good practice in grantmaking.

Was it always part of Lotterywest's mission to be responsive to the community, and give many more small grants rather than a few large grants?

From the early days there was a belief that our grants should be flexible and responsive to community needs and should be submission based. We are in the fortunate, and rare, position that the size of the grants was never really an issue for us. We have a large amount of money to distribute. 30 per cent of our turnover is our return to our beneficiaries, and of that 30 per cent half goes to our State Health Department; 2 per cent goes to the Department of Arts and Culture where it funds major arts organisations, e.g. ballet, symphony orchestra; another 2 per cent goes to the Department of Sport and Recreation where it funds the elite institute of sport and about 120 different sports organisations.

What's left over is what we run as our grants program, and last year this was \$73 million. Under our Act we're obliged to fund the Perth International Arts Festival, who receive about \$4 million, and Screen West, our film body, get \$4 million, so that leaves about \$63 million, which last year funded about 1,200 different grants.

The 80/20 rule applies to the grants – about 80 per cent of the grants are under \$50,000. For example, playgroup and toy libraries effectively only need to prove they exist and they can get up to \$5,000 for toys.

It's incredibly easy for applicants – they just need to be not-for-profit community groups, whether they have DGR or not. As we're not set up as a foundation, our applicants' tax status is irrelevant to us; as long as the purpose of the grant is charitable or benevolent, and note the latter term has almost no limitations around its definition. 95 per cent of our grant applicants succeed.

A 95 per cent success rate is remarkable! How do you achieve that?

The message to my staff and my own philosophy is, that when someone approaches you for a grant, the word in your heart must be 'yes', so how are you going to get to 'yes' with this group? If they've come in with a half-baked idea that doesn't really meet any recognisable guideline, then our team's approach is how do I take the essence of what this group is trying to do, and how do I work with them so we can, in all conscience and consistent with our legislative framework, say 'yes'? Sometimes this might take a long time, so you don't let people get to the application stage if you're going to say 'no'. So the success rate is because of the ground work we do with our applicants.

Does the easy availability of this funding make community organisations too reliant on you, becoming dependent rather than sustainable?

I don't think so. One of the things our grantees tell us is that getting a Lotterywest grant has given them credibility to approach the corporate sector. The corporates know that they are reliable organisations and have met our tough processes to get to the point where we fund them.

What I find really interesting is people – who in their business life would never embark on a new business without a business plan, a risk analysis, cash flow projections, all the disciplines that apply to a normal business that apply. – who leave that practice elsewhere when they start in the non-profit sector, as if good intentions alone will get them through. So one of the things we do is fund organisations for a grant to do some business planning, asking them if they have the capacity to undertake that planning themselves, or should apply for a grant to employ an experienced person to do this planning for them.

We are very conscious of leveraging, offering matching grants to encourage applicants to use the partial funding secured to obtain further funding.

What do you think of the trend toward high engagement, high impact grants. i.e. where foundations are less responsive to the community?

I think there is a place for both these approaches, a place for making a commitment to a major project and funding it sufficiently well that it can succeed, and long enough to succeed.

Having said that, when you look at the impact that the community culture project has had, it's the little grants that

allow community groups to buy the kiln for the pottery group or uniforms for the choir. The purpose of these groups isn't really about creating beautiful pottery or singing beautiful songs, it's about people creating connections, friendship groups and support networks. What the groups say to us when they get these grants is that it's allowed the group to have heart, we've affirmed their purpose.

I believe the bread-and-butter grants can be as transformational as the change-the-world grants. If we take depression, mental health and social isolation, the small community groups are often the back-bone of community health and relationships, and if those groups didn't exist the biggest mental health program wouldn't make a difference.

What is one of your most inspirational grants?

One of the projects we're very proud of is FoodBank. We started to get dissatisfied in the early 1990s with the plethora of emergency relief organisations that wanted grants to give to their clients, largely for food. We often bring a bunch of people into the organisation who've got a common theme, who are all talking about the same thing. There were several agencies that were prepared to work together. We initially gave them a grant of \$15,000 to buy an expert in to develop a business plan, and this showed that this was a viable project, where unwanted food, or unsellable food from supermarkets, manufacturers, and fruit and vegetable growers, could be brought together into this food bank and distributed to the agencies for minimal cost. They've recently had their 10th anniversary, and they're now able to distribute food at 27 cents a kilo; that's what it costs to distribute it, which makes them almost self-sustaining.

We subsequently funded them for a freezer, a forklift truck, and co-funded them for towards larger premises and additional bases.

Are all your grants small grants?

No, for example we used to have a specific medical research funding program, mainly for medical research equipment, run in the traditional manner as a competitive process and evaluated by a technical panel. However we really didn't know what good was coming out of this, so we decided to fund a medical research symposium where every grantee was to attend and present a brief report to the whole symposium on what they had been able to achieve as a result of their grant. The outcome of this was staggering, in that people attending were so unaware of what their colleagues were doing and the resources they had which could

potentially be shared. The symposium had created a fantastic networking opportunity which was quite new. In effect they were presenting their evaluations to each other, rather than just to us, the funder.

It seemed that medical research was moving so fast and the technology was becoming so sophisticated that it could no longer effectively be funded by a series of small grants. So I decided to ditch the competitive grants process for medical research. Instead we brought the leading medical researchers together and told them we were prepared to grant about \$2 million for medical research, but only when they could all agree on what that money should be used for, and that several if not all of them could share it. Essentially we said, you tell us how this should be done – they were so used to competitive grantmaking that they had great difficulty working collaboratively. It took them nearly two years to reach a solution, but they worked it out in the end, putting the money into genetic research.

Interestingly we have now abandoned funding medical research specifically, in favour of funding any research which benefits humanity – medical, social, conservation, environment. These seem to be artificial boundaries, when what we are interested in is quality research that will have an impact on the wellbeing of people and communities.

Next year it's Lotterywest's 75th birthday. How are you planning to mark the occasion?

We're doing an extensive piece of research on the history of Lotterywest, with two publications planned – a coffee table book, and more scholarly analysis of Lotterywest in the life of the community. Several Lotterywest research fellows have been researching for almost three years, reading all the minutes of the meetings (records been digitized). Another historian is going through the pictorial archives in the WA State Library for stories and pictures for the coffee table book. What I hope this research shows is whether our grants were reflecting the era of the time, or leading the way, suggesting that some of the grantmaking was cutting edge in the 1930s.

The reason I've stayed as long as I have – I've been CEO since 1992 – is only because it gives me the opportunity to raise money for the community, and have some input into the broad direction of how that money will be used. This is the motivating factor, contributing to the community and working with like-minded businesses and government agencies to do things that are truly transformational.

Using small grants as a catalyst for change

By Ondine Sherman, Director and Co-Founder, Voiceless, the fund for animals

Voiceless, the fund for animals, is an organisation that aims to be a catalyst for change, a think-tank and a vehicle for capacity building. Animal suffering and the cruel industries and practices which perpetuate it cannot be addressed by a few individuals acting alone. This is why a grants program was Voiceless' first initiative.

Animals are suffering at an unprecedented rate in our society. The growing demand for cheap meat, eggs and dairy food has caused an exponential increase in the number of animals produced and has changed the face of farming in Australia and around the world. Today, many Australians eat meat several times every day, consider it 'fast food' and don't give a moment's thought to the way animals are raised from farm to fork.

Voiceless' grants program is the only source of funding for the animal protection community in Australia. Due to current government priorities, there is no tax deductibility on donations to animal protection organisations, other than those involved in the rehabilitation of animals or provision of short term care. Organisations that raise awareness of important animal protection issues are therefore unable to raise funds on the same level playing field as those that address environmental, health or social issues.

2007 represents the fourth year in the life of the Voiceless grants program. Over the last few years we have awarded more than \$560,000 to fund many inspiring and innovative projects aimed at improving the lives of animals in Australia. The program attracts well over one hundred applications each year. Voiceless awards grants in amounts ranging from \$2,500 to \$20,000. Finding ethical corporate sponsors who are not shy to put their name to this new social justice area can be challenging. However, many have come onboard to assist, including Hunter Hall, Berg Family Foundation, Morinda Australia, Bio-Distributors and Lush Cosmetics.

Awarding many small grants not only creates momentum in the movement and builds the capacity of other



2006 Voiceless Awards Recipients, courtesy of Jamie North.

organisations to take action; it provides an important opportunity to publicly acknowledge the work of the individuals who make up the animal protection arena. Many of them work on a voluntary basis with little reward or accolade. For most, progress is slow and they need to continuously draw on their passion, compassion and sense of justice to keep them going through inevitable burn-outs and disappointments.

Voiceless' annual grants event gives these individuals a moment of celebration and a feeling of being part of a larger supportive family. In addition, it reminds them that they are on the cusp of a new wave making history in social justice. Glass awards are presented in a formal ceremony attended by the media and Voiceless' celebrity Ambassadors, actors Hugo Weaving and Abbie Cornish and supported by Patron JM Coetzee (Nobel Prize winner for Literature). Media attention at the event is a crucial component bringing the issues directly to the public and persuading other individuals, businesses and decision-makers of their legitimacy.

Projects that receive Voiceless grants are many and varied spanning legal, political and education areas. Recipients usually consist of a mix of animal groups, universities, local councils and community organisations. Examples include: Compassion in World Farming, Coalition against Duck Shooting, Griffith University, Shoalhaven City Council, Ramingining Community Government Council, Redfern Legal Centre and Student Youth Network Victoria.

Running a grants program requires both organisational and diplomacy skills. Voiceless has refined its application process to two stages. The first stage involves the submission of simple 'expression of interest' forms which are reviewed against criteria and priorities. A 'short list' is then selected and invited to submit full applications including time-line and budget details. A formal judging committee then debates the merit of each application in order to decide on the final recipients. Voiceless is only able to award grants to approximately 10 per cent of applicants and the vast majority need to be consoled and encouraged to refine their project and apply again.

Human Battery Cage Campaign

The Vegetarian/Vegan Society of Queensland last year received \$20,000 for their 'Human Battery Cage Campaign' which uses a kind of installation art with oversize battery cages containing human occupants to be displayed in public spaces around Australia.

The purpose of the campaign is to illustrate the cramped and inhumane conditions that battery hens endure and to encourage members of the public to take action against this cruelty. This campaign has received a huge amount of attention from the media and generated significant discussion and awareness about the issue.

Further information www.voiceless.org.au

A century of small grants in South Australia

By Elisabeth Gazard and Pauline Dundas

Many philanthropic organisations are specifically precluded from funding individuals. With 'named individuals' as the exclusive focus of Wyatt Benevolent Institution's grants, we have the ability to provide a form of assistance that many bigger picture programs are unable to provide.

The Wyatt Benevolent Institution has the ability to provide a form of assistance that many bigger picture programs are unable to provide. Small grants offer opportunities for people who are financially disadvantaged to participate in education or training and enhance social inclusion. These grants can have a very positive effect on mental and physical health and make a significant difference to quality of life.

Beginnings

In 1881 when Dr William Wyatt conceived the idea of forming a trust, life was very different in South Australia. Seeing some of the early settlers struggle through adversity, he decided to leave his estate for the benefit of people 'in poor or reduced circumstances' with preference to those who had been resident in South Australia for at least five years.

From this modest beginning The Wyatt Benevolent Institution Incorporated (Wyatt) now provides up to \$1.8 million annually in the form of grants, scholarships, housing and housing support packages to more than 2,000 South Australians. The majority of these grants are less than \$1,000 and are paid directly to service providers or creditors on behalf of applicants.

We believe that providing small grants does not take away opportunities to be strategic and to work towards broader community goals. Our areas of focus – housing, education, employment, early childhood and general and Indigenous welfare – have been strategically selected to improve social wellbeing and health.

The Wyatt grants program

1. Financial Assistance Grants are small grants of approximately \$300-\$1,000 that cover basic needs, such as utility bills, rent and whitegoods. A Wyatt grant is intended to add value to the efforts of health and welfare professionals, or community workers, who are assisting clients in financial hardship.

2. The grants program extends its scope by forming alliances with not for-profit organisations to subsidise affordable housing. Wyatt also owns 55 housing units, which accommodate 70 older people.

In addition, Wyatt supports organisations providing services to families or individuals at risk of homelessness by offering 'housing support packages' that enable people to resettle successfully in affordable accommodation. These funds range from approximately \$200 to \$2,500 and cover items such as removal expenses, household items or rent subsidy.

We encourage the organisations receiving our funding to share with each other their practical experience and learning.

3. One of Wyatt's strategic decisions has been to provide funding for people to undertake education, as a means of improving their economic position. More than half of Wyatt's grants budget is spent on scholarships and grants for tertiary level education. A major focus is currently on expanding support for Indigenous secondary and university students.

People on Centrelink incomes face the hurdle of up-front fees when they enroll in TAFE courses or re-enter school. Annually, Wyatt assists approximately 400 people on low incomes to undertake vocational education.

Wyatt was one of the first organisations to provide university scholarships in the 1990s when there was little support for the children of struggling rural families. Since the advent of Commonwealth Learning Scholarships, Wyatt scholarships for country students are less significant.

There is an element of personal capacity building in our High Achiever Awards that enable

individuals who have excelled in sport, the arts or academic study to take up opportunities that would otherwise be precluded because of lack of funds.

Wyatt's broader strategies require partners. We collaborate with funding bodies or service agencies to add value to their programs, many of which have statewide and long term scope. This expands the impact of small one-off grants. There have been a number of examples where a Wyatt initiative has been taken on by other funders or government, once the need had been demonstrated.

The development of successful partnerships with other organisations takes time – negotiation, institution of a trial program and fine-tuning. Evaluation of the grants programs is challenging – partner organisations are required to provide annual outcomes reports according to set guidelines, as well as quarterly financial reports, but real impact evaluation is problematic. Very occasionally we have direct feedback from the recipients.

Wyatt's office is staffed by seven and uses consultants for investment advice. High standards of practice are set to preserve the privacy of applicants and to pay the grants quickly and efficiently. Administrative costs are relatively high, but closely monitored.

It is believed by some that grants paid to needy people (charity) are not effective in the long term and somewhat demeaning to the recipients. We strongly believe that our small grants program provides the opportunity, through timely financial assistance, to show care and compassion for individuals and address wider community needs at the same time.

The Wyatt Benevolent Institution Incorporated: www.wyatt.org.au

Effectiveness, responsiveness, knowledge

By Christine Edwards, CEO, The Myer Foundation and the Sidney Myer Fund

There is considerable debate about effectiveness in philanthropy, particularly about large versus small grants. In this debate, there is a risk that we see one type of philanthropy as being more effective than another. It is misleading to see small grants as a less effective form of philanthropy, and to see large grants as the only way of making significant change in our society. This polarisation may lead us to lose sight of the ways in which small grants can have significant impacts, and bear fruit over time.



Christine Edwards, CEO, The Myer Foundation and the Sidney Myer Fund.

Our small grants program, run mainly through the Sidney Myer Fund, is part of a larger model that has several components. With the Board of The Myer Foundation and the Trustees of the Sidney Myer Fund, we developed the model based on a set of principles that have directed the changes and our activities over the last 18 months.

Why did we establish a small grants program? The answer lies, in part, in three of the principles of the model: effectiveness; responsiveness to the community; and knowledge based philanthropy.

“Small grants also express our faith in an organisation. This can be of enormous value for an organisation that may need support, or need someone to believe in what they are doing.”

Effectiveness

The community sector is growing, and it is playing a bigger role as governments move away from direct service provision to outsourcing or contracting. Our small grants are designed to be effective in helping organisations and communities deliver the services that communities need. Their effectiveness lies in the close relationship between the size of the need or problem, and the funding that we provide. We decided to target our funding to smaller sized projects so that our contribution is a substantial proportion, thus helping people to realise their goals.

In the last year, we have given \$2 million in small grants to over 142 organisations.

Responsiveness

People in the community are the best to know what is needed. We want to help the sector to develop, create new services, and assist individuals to find meaning and expression in their lives. We implemented new systems

to create a quick turnaround time: more frequent meetings; no closing dates; simpler forms; and delegated funding authority to the level of the particular committee. The program's responsiveness helps people to respond to urgent, important, creative issues. It also helps organisations to respond to the ongoing struggles of people in need.

Knowledge based philanthropy

We value learning about what we do and how we do it. There are three areas in which this happens: in the research and assessments that we undertake prior to a recommendation; in evaluating whether our grant made a difference, how, and for whom; and in monitoring the process that we're using to make it as smooth and useful as possible. This approach is prompted by the responsibility that we have as stewards of other people's wealth – to make sure that we make decisions that are informed and can stand up to scrutiny and challenge.

“Our small grants are designed to be effective in helping organisations and communities deliver the services that communities need. Their effectiveness lies in the close relationship between the size of the need or problem, and the funding that we provide.”

As part of our goal to support communities, we fund the development of organisational knowledge, helping people and organisations to learn, develop and become stronger. For example, we have supported organisations to develop business strategy, or to do evaluations.

Small grants can have an immediate impact. They can also help to get things done that may not otherwise get done. These are two of the great things that we like to see happen in our small grants program. For example, we funded the replacement of play equipment at a pre-school to enable it to remain open and maintain it as a viable resource for the community. The need was urgent and immediate.

Apart from filling a gap, our funding can provide leverage for funding from other sources, or for a bigger project. In this way, our support can provide an example to others and encourage the mobilisation of community support.

Our program also provides us with information and knowledge that we use in our large grants program. For example, we get to hear about things that are happening that could be scaled-up into bigger projects, or we develop better understanding about issues by seeing patterns and trends emerging from our small grants.

Small grants also express our faith in an organisation. This can be of enormous value for an organisation that may need support, or need someone to believe in what they are doing. In being freer to take a risk in supporting them, we can provide a building block for them to use in many ways, such as leverage for other funding, or having resources to think and plan.

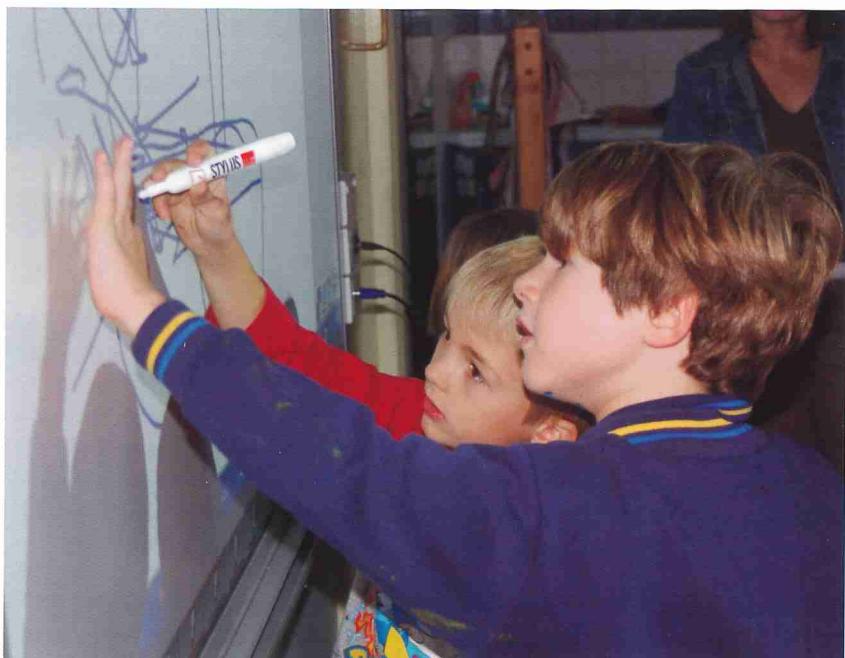
One of the biggest challenges of this program is to keep it simple. If our goal is to enable community development by being responsive to demands, then we need simple and quick processes. However, we have found that we do a lot of assessment work for these grants. Because it is a competitive process, we put time into understanding the project, making sure that it and the organisation are credible and viable, and undertaking sufficient due diligence to be confident that we are making a good decision. We want to be fair in how we treat each application.

We are mindful of the resources that are used in applying for grants. Another challenge therefore is to get the right balance of resources used to get the grant, against the amount of the grant provided. By making our process as simple as we can for the applicant, we hope that we reduce the resource burden.

Simplicity also means that we want to be flexible about the application itself. We work with people who may not be familiar or at ease with an electronic format, and we accept hand-written forms. Our commitment, and sometimes our challenge, is to see the idea behind the application and respond to that, rather than to how the application has been processed.

The small grants program has been in operation for 18 months. We are starting to use the acquittal forms to review how effective and useful we have been, and we will also be talking with grant recipients to get their views about how we could be more effective.

Overall, regardless of the type of funding that you do, it is difficult to give away money well. For us, it is about balancing being responsive with making good decisions that are supported by sound assessments.



Port Phillip Specialist School were supported to purchase two interactive white boards to enrich and enhance the school's literacy program.

Drinking with intent: The Swinburne Alumni Fund

By Leslie Falkiner-Rose, Secretary, Swinburne Philanthropy Alumni

It was an unusual genesis: a group of students deciding that keeping in touch through an occasional social drink was simply not enough. They had, if you like, to drink with intent and put their money where their education was.

The result – an Australian first – was the establishment of a philanthropic fund by the student alumni of the post graduate courses in Philanthropy and Social Investment at Swinburne University in Melbourne.

The past and present students of the Swinburne course, who make up the alumni, have a natural bias towards the more altruistic end of the giving scale. But, as any grantmaker knows, deciding how to give away money most strategically can be a daunting challenge – one further emphasised by the need to get maximum bang for the small number of bucks on hand.

The first obstacle to overcome was the establishment of the fund itself. Without a sizable corpus, a Prescribed Private Fund (PPF) was not a viable option. So, after reviewing the community foundations available, the students decided to set up the Swinburne Philanthropy Alumni (SPA) Trust as a sub-fund of the Lord Mayor's Charitable Fund – a decision value-added by the fact that the Fund's General Manager, Leigh Wallace, was a trusted fellow student.

The next problem was getting the money. One of the students agreed to underwrite the \$10,000 it was necessary to place in the sub-fund within the first five years. However, it was a kind gesture that proved to be unnecessary as contributions from the students and lecturers saw \$20,000 raised even before the fund's official launch by Rupert Myer at Melbourne Town Hall, late last year.

As at June 30 this year that figure had grown to \$30,000, with the first distribution – albeit a very small one – soon to be made. The students

decided that regardless of the amounts to be given away, it was still critical to draft robust grantmaking procedures and guidelines for those associated with the sub-fund in the future.

Many alumni members felt that, while the amounts of grantmaking money were important (particularly to the grant recipients!) the actual grantmaking process should have equal standing.

Many of those who attend the Asia-Pacific Centre for Philanthropy and Social Investment at Swinburne University are not actually hands-on grantmakers. Alongside those directly involved in family and corporate philanthropy are students who work in corporate responsibility areas; 'philanthrocrats' who manage or work for funds; financial advisers to philanthropists and others working in not-for-profit areas. For them the SPA Trust was to be a living model to support their educational learnings. For those already involved in grantmaking it would be a tool to help sharpen their skills.

Drawing the boundaries on the scope of the sub-fund was always going to be difficult. Composing the grantmaking guidelines from scratch was a frustrating and challenging creative process. For a start, there were endless possibilities, a desire to use best practice in the process, the need to encompass the views of the very different personalities involved and not a lot of money to spread around. However, after a good deal of debate, two key criteria emerged: how best to define grants that fitted the alumni mission of 'Change Through Knowledge' and how to gain the most leverage for the small amounts of money initially in the pot.

The result was a focus for 2007 on grants of up to \$2,000 to fill what alumni members saw as an under-developed granting area, aiming to:

- provide educational opportunity and support for not-for-profit organisations. This could include formal mentoring programs or assistance with travel costs to attend a national or international philanthropy conference. It could consider fee support for formal studies that will contribute to philanthropic skills and effectiveness or consider other programs that contribute to capability building for the individual and their not-for-profit employer;
- promote better interaction between grantmakers and grantseekers. Examples might be training to teach not-for-profits how to prepare grant applications for funding, or help to cover the cost of preparing the comprehensive project specifications required for some grant applications;
- promote involvement in the philanthropic sector. For example, encouraging community interest in and understanding of philanthropy and related skills in the community possibly through primary and secondary schools, or rural and regional workshops.

With those thoughts in mind the Granting Committee formed at the Annual General Meeting of the alumni is about to start their inaugural grantmaking round. Others in the alumni will continue to look for ways to boost the capital and the potential impact of the SPA Trust.

To make a tax-deductible donation to the SPA Trust, or for further information, please email Rikki Andrews on randrews@trust.com.au

A tale of two programs: The CASS Foundation

By Daniel Rechtman, Director, The CASS Foundation Limited

Soon after The CASS Foundation began operating in 2002, we established two small grants programs, in addition to our larger grants.



Contributing to Australian Scholarship & Science

One was a small education grant scheme where the eligibility criteria was for applicants to demonstrate that the grant would address a specific need, or the needs of a disadvantaged group in the field of education.

The other was a small travel grant scheme (established in 2003) to further the career opportunities of early career Australian post-doctoral researchers by funding their attendance at conferences overseas where they are presenting the outcomes of their research to their peers.

The way we established these two grant programs was quite different and – in the relatively short time we have had to evaluate them – have had differing impacts and effects on the areas they were intended to serve. They have, we believe, given us valuable learning experiences on issues of focus and outcomes which many foundations are now seeking to address.

The small education grants are open to Victorian applicants. The guidelines are quite broad, and it is very much a response-related grant round. We have had (as will be expected) an extraordinarily large range of projects which we have funded. In many cases the recipients have been quite small organisations where our small grants have been greatly appreciated and seem to have made quite a difference to the specific project. In some cases, we have been able to follow up in subsequent years and see that the grant, though small, has led to 'proving' the efficacy of the project and permitted it to proceed by way of other funding or

by becoming self-sustaining. Despite these positive outcomes, we have found that there is no real 'focus' in many of these grants and in the last two years the quality of the applications has been disappointing. It may be that there are now alternative sources (Federal and State Governments, community foundations) for those sorts of grants.

Administratively, the small grants are quite time consuming for both applicants and for our staff and directors, having regard to the amounts disbursed. It is understandable why foundations are

It has been even more pleasing to sometimes see some of our travel grantees a year or two later as successful applicants for our large medical/science grants, and to follow their careers.

The administrative burden on The CASS Foundation for these travel grants is about the same as for the small education grants, but there is a real sense that the 'outcome' is more measurable and focused. Its impact on the individual is clearer and the impact on the wider scientific community is positive.

"The lessons are that whilst it is of value to the recipients to provide small, general purpose grants, we have to question if these sorts of grants do really change very much..."

looking more critically at those sorts of 'general' small grants. They may have a positive impact on the recipients, but it is hard for foundations to see that they create any real focus, any long term benefit to recipients or any long term benefit to the wider community.

By contrast, our travel grant program grew out of a concentrated and focused consultation process and workshop with the medical/science community, to assess what was 'missing' in the philanthropic area to help retain young researchers in Australia and what early career researchers themselves said they needed.

It has been pleasing to get very positive feedback from our travel grantees about the value the grants have been to sustaining their careers.

Importantly, that community recognizes The CASS Foundation as providing a very real benefit to early career post doctoral researchers striving to get their research careers established both in Australia and on the world stage.

What have we learned from both grant projects? The lessons are that whilst it is of value to the recipients to provide small, general purpose grants, we have to question if these sorts of grants do really change very much, and that there is much more chance of effecting change and getting value for the dollar spent if you have adequately researched what is needed, focus on that need and seek to have an impact for the funds you spend.

*The CASS Foundation:
<http://www.cassfoundation.org/>*

Opinion: Philanthropy's misguided focus on 'root causes'

By William Schambra, Director, Hudson Institute's Bradley Centre for Philanthropy and Civic Renewal (William@hudson.org). This opinion piece originally ran in the Chronicle of Philanthropy June 28 2007 and on the Brandley Center's website (<http://pcr.hudson.org/>). It is reproduced here with the author's permission.

Most foundations are driven by the conviction that they must not waste money on charity, which simply puts band-aids on society's problems. Rather, they must try to get to the problems' root causes, thereby solving them once and for all. After a full century of efforts to follow this rule, it's time to ask: Is it anything more than a mindless mantra?

The question arose recently when Susan Berresford, [then] president of the Ford Foundation, took umbrage in an essay in the *Seattle Post-Intelligencer* at claims by a 'new generation' of 'entrepreneurs turned philanthropists' that they, unlike the 'old' foundations, were going to be "ambitious, entrepreneurial, innovative, and focused on measurable results."

That was grossly unfair, she insisted, because well-established foundations like hers had "performed generations of work strategically aimed at root causes of enormous problems."

Indeed, as early as the 1890s John D Rockefeller insisted that "the best philanthropy is constantly in search for finalities – a search for cause, an attempt to cure the evils at their source." But more than 100 years later, why are the results so negligible as to escape altogether the notice of newcomers?

Perhaps it is not as easy as the familiar mantra suggests to identify the causes of society's problems.

For instance, Frederick Gates, an early adviser to the Rockefeller Foundation, believed that "disease is the supreme ill of human life, and it is the main source of almost all other human ills – poverty, crime, ignorance, vice, inefficiency, hereditary taint, and many other evils."

Consequently, the early Rockefeller Foundation poured money into medicine and public health, convinced that social and economic conditions would improve in due course.

Today, the Bill & Melinda Gates Foundation seems to share the conviction that combating disease is the key to alleviating poverty, as it pumps billions of dollars into the fight against AIDS, malaria, and other health problems of the developing world.

But is disease the cause and poverty the result, or is it the other way around? That's the question posed by Anne-Emanuelle Birn, an expert in international health policy at the University of Toronto.

In a recent issue of the British medical journal *The Lancet*, she insists that the Gates Foundation's public-health efforts will have only limited results because they reflect "a narrowly conceived understanding of health as the product of technical interventions divorced from economic, social, and political contexts."

Global health "might be better served," she insists, "through political support for universal, accessible, and comprehensive public-health systems... in the context of overall improvements in living and working conditions."

In her view, fighting disease will not end poverty. Rather, reducing poverty through redistribution of wealth and a robust social-welfare state is the best way to fight disease. Far from getting at root causes, the Gateses' billions are only focusing on symptoms.

A similar difficulty arises with another major 'root cause' solution long championed by the Rockefeller, Russell Sage, and Ford foundations. Looking askance at early philanthropy's obsession with physical illness, Raymond Fosdick,

president of Rockefeller from 1936 to 1948, cautioned in *The Story of the Rockefeller Foundation* that "unless we can find successful solutions to some of the intricately complex and fast-growing problems of human relationship, we run the risk of having a world in which public health and medicine are of little significance."

The effort to solve 'problems of human relationship' called for fresh approaches to root causes, this time guided by new social or behavioral sciences like sociology, psychology, and political science. For three decades beginning in the 1920s, then, the major foundations devoted substantial money to these academic disciplines, aiming to get to the sources of 'fear, hate, guilt, and aggressiveness,' which were, in Mr Fosdick's view, "the forces which bring about the disintegration of human society."

Statesmen enlightened by social-science expertise would now be amenable to 'social arrangements through conscious planning and mutual agreement,' rather than through the dangerous, ideological 'struggle of opposing forces.'

The notion that a truly scientific understanding of human behavior will enable us finally to resolve human conflicts still appeals to grantmakers looking for ultimate answers.

But recently, progressive or 'social change' philanthropy has argued that behavioralism may compound, rather than solve, society's largest problems. Like its predecessors, this brand of philanthropy focuses on root causes.

But now, as Tracy Gary puts it in *Inspired Philanthropy*, it is interested in “the root causes of disadvantage or practices that threaten values such as equity or a healthy planet,” among which are “exploitation, racism, sexism, and homophobia.”

In this view, the behavioral sciences may simply provide tools for the clever manipulation of the masses by the ruling elites, enabling them to conceal and preserve the deeply rooted inequities of race, gender, and class from which they benefit.

Even the public-policy changes supported by liberal foundations are designed chiefly to “divert protest into safe channels,” argues Joan Roelofs, an emerita professor of political science at Keene State College, siphoning off or neutralizing the political aggression and anger that, if properly harnessed to mass movements, would lead to real change.

By contrast, as the sociologists Daniel Faber and Deborah McCarthy suggest in *Foundations for Social Change*, genuinely effective philanthropy pursues “movement-building strategies that aim to eradicate the causes of social and environmental injustice as grounded in larger political-economic power relations of American capitalism, rather than merely providing stopgap solutions that treat the symptoms but not the cause.”

The “struggle of opposing forces” was, for Mr Fosdick, part of the problem to be solved by foundations. But for progressive philanthropy, it’s part of the root-cause solution instead, as foundations mobilize movements to rise against capitalist inequities in the name of a radically different, if only vaguely defined, political and economic system.

For more than one hundred years, foundations have thus grasped at often deeply divergent physiological, sociological, and political solutions to human problems, with today’s cutting-edge, root-cause solution morphing into tomorrow’s charitable band-aid. There’s nothing wrong with trying different approaches, of course, or putting together various combinations of them. Indeed, some observers suggest that experimentation and variety are among philanthropy’s chief virtues.

But the implacable logic of root causes demands far more than casually dabbling with this or that approach, or stirring in a little bit of everything. It insists that, backed with enough resources and steeled against the superficial and distracting symptoms of social malfunction, the professionally equipped expert – whether the medical investigator, the social scientist, or the progressive organizer – can penetrate to the very core of a problem, coming up with a decisive solution that will remove it once and for all as a public concern. Short of ‘curing evils,’ all else is mere coping with effects, or charity.

be difficult to identify a single significant social problem to the roots of which philanthropy has penetrated, thereby finally resolving it. Small wonder, then, that new “entrepreneurs turned philanthropists” look about and conclude that strategic, results-oriented grantmaking has yet to be tried.

If new donors are not to travel the same prideful path of vaulting promises followed by disappointing results, however, they should forgo the fruitless and even dangerous search for grand, conclusive answers to our difficulties.

“Foundations have grasped at often deeply divergent physiological, sociological, and political solutions to human problems, with today’s cutting-edge, root-cause solution morphing into tomorrow’s charitable band-aid.”

Given the pitiless resolve of root-cause approaches, it’s just as well that foundations tend to pull back before their logic reaches its limits. For instance, as suggested by Frederick Gates’s mention of ‘hereditary taint,’ the Rockefeller and Carnegie foundations once avidly supported experts in eugenics, who argued that defective genes were the chief source of human misfortune. The root-cause solution was to sterilize the genetically ‘unfit.’ The foundations quietly dropped this approach after Nazi Germany’s race program suggested where eugenic logic inexorably leads — but not before some 50,000 Americans had experienced philanthropy’s ‘solution.’

Similarly, we are fortunate that only a handful of foundations buy into the notion of root causes championed by progressive philanthropy. The 20th century gave us more than enough experience with the belief that human problems can be solved only by mass movements mobilized behind the overthrow of capitalism in the name of radically egalitarian utopias.

At any rate, after a century of trying one approach after another, it would

Instead, they should take a closer look at the thousands of charities that have come up with solid, modest approaches to smaller, more limited aspects of problems.

Such groups do not brush impatiently past symptoms as presented by those who suffer them, treating them as distractions en route to underlying problems comprehensible only to experts. Rather, they take seriously the immediate concerns of those before them and focus on them, in the name of human dignity and democratic responsiveness.

This approach is, of course, derided as contemptible charity by die-hard believers in the search for root causes. But after a century of frantic and futile pursuit of ultimate answers, it’s time to reconsider charity as a more sensible alternative. That’s better than wasting ever more millions on behalf of a mantra without meaning.

Australian Philanthropy welcomes comments on this, and any article. Email the editor at larkles@philanthropy.org.au

Can small grants make a big difference? Evidence from Nepal

Dr David Morawetz, Director of the Morawetz Social Justice Fund, and his partner Jan Pentland visited Students Partnership Worldwide (SPW) projects in Nepal and India in February 2007. SPW is an international development NGO working to the 2015 Millennium Development Goals, particularly those around girls' education, safe drinking water, sanitation and HIV/AIDS. It partners young local-country volunteers with young western volunteers, and reaches 400,000 children and young people each year in rural communities in South Asia and sub-Saharan Africa. The Morawetz Social Justice Fund has been a major donor to SPW's work since 2005. Following are extracts from David's insights and impressions from his visit to SPW projects in Nepal.

Most of our time was spent visiting SPW projects in the Terai or plains region of Nepal, a semi-arid and very poor area in the south of the country. We were greatly impressed by the work of SPW in Nepal, and by SPW's intelligent, professional and passionate young Nepali staff, many of whom had started out as local-country volunteers, and some of whom give a tenth of their very small salaries to allow poor kids to go to school – a testament to the staff members' strong belief in social justice.

The Morawetz Social Justice Fund focuses much of its international grantmaking on girls' education and safe drinking water, aims that we share with SPW. While in Nepal, we were able to visit some projects that we have supported, which was a very affirming experience.

In one project, SPW supplies simple arsenic filters to combat arsenic contaminated water supplies in rural villages in the Terai. Arsenic occurs naturally in this area, coming from the earth underground, and contaminating tube-well water supplies. It causes mental retardation in children, severe stomach problems, skin diseases, other waterborne diseases, and discolouration of teeth and fingernails. It turns out that a simple arsenic filter, a clever contraption which uses locally available materials (mainly, four or five kilos of small inexpensive iron nails), and costs just \$20, can solve these problems.

We saw such arsenic filters in operation in several houses. Householders pay about one third of the cost, which is important to provide 'ownership', and to ensure that maintenance is done, as it invariably is, because of the remarkable difference that these filters make. We met a group of 40 or 50 women and men who have had arsenic filters in



Some of these girls have been enabled to go to school because of the activities of Students Partnership Worldwide Nepal, where very modest grants are targeted to make a very considerable difference.

their homes for 10 months, and they reported significant improvements in stomach and skin problems, and in health in general. They asked that all their neighbours should have these filters too.

This project also includes arsenic awareness workshops, health surveys, vitamins for arsenicosis patients and a maintenance program to ensure

ongoing sustainability. It is a simple, cost-effective initiative that promises to enhance significantly the health and life expectancy of large numbers of Nepal's poorest citizens.

Many more arsenic filters are needed in Nepal, with the main barrier being the (relatively low) cost. A small donation of just \$1,000 would save 300 people

“A small donation of just \$1,000 would save 300 people (50 families) from being poisoned by arsenic in their drinking water – a cost of just \$3.33 per person. Surely, having arsenic-free drinking water is one of the more basic human rights!”

(50 families) from being poisoned by arsenic in their drinking water – a cost of just \$3.33 per person. Surely, having arsenic-free drinking water is one of the more basic human rights!

A second project that we visited involves the building of new, innovative, energy-efficient smokeless stoves, once again using inexpensive locally available materials – in this case, mud and mud-bricks. We saw houses that have these new stoves, and others that use the old stoves.

In the traditional system, the villager simply lights a fire in the corner of a one-room house, and cooks one pot of food on it. There is no chimney, so smoke fills the room, causing respiratory and eye diseases.

By contrast, the new stoves have a simple chimney so that smoke exits the house, and they have capacity for two cooking pots (some can take three). Respiratory diseases (like asthma) and eye diseases are immediately improved because the smoke is now directed outside. Because there is capacity for two or three pots, cooking time is halved or cut in three. There is also a significant saving in firewood, and in time taken to collect firewood. Because girls do most of the cooking and collecting firewood, their time is now freed up, and they are now more likely to be able to go to school.

This is a beautiful example of creative lateral thinking: introducing simple new mud and mud-brick stoves enables girls to go to school, thereby totally changing their life chances, and those of their children once they have them!

SPW staff and volunteers train local villagers to build these stoves. We met one village woman who has built



This Nepalese village woman has built 21 of these improved mud-brick stoves. These stoves cut in half the time needed for girls to gather firewood and cook, thereby freeing them up to attend school. Each stove costs just \$20, but the impact is huge.

21 of these stoves in her village. In eastern Nepal, SPW has trained more than 300 villagers in stove building, and more than 10,000 such stoves have been built, enabling thousands of girls to go to school, reducing the incidence of respiratory and eye diseases, and conserving firewood.

Because of lack of funding, millions of Nepali villagers do not yet have these ingenious \$20 stoves. Once again, even small donations can make a huge difference in the lives of these very poor people.

All of the above is impressive enough. But when you consider that these projects are delivered by young Nepali and western volunteers, many of whom have no formal work experience or qualifications, and who are themselves being given a life-changing opportunity,

which in turn ripples out to improve the lives of their families and communities, it is a system that delivers on many different levels.

Having now seen first-hand and appreciated the quality, importance and cost-effectiveness of SPW's work, we at the Morawetz Social Justice Fund look forward to continuing to be supporters of SPW into the future.

For more information on SPW, visit www.spw.org.au. If you have any questions at all about effective grantmaking to developing country projects in general, David is happy for you to contact him by email: morawetz@bigpond.com

*Dr David Morawetz, Founder and Director, Morawetz Social Justice Fund
Email: morawetz@bigpond.com*

Spiritual and social giving: The Mary Potter Trust Foundation

By Coty Cortese, Executive Officer, The Mary Potter Trust Foundation

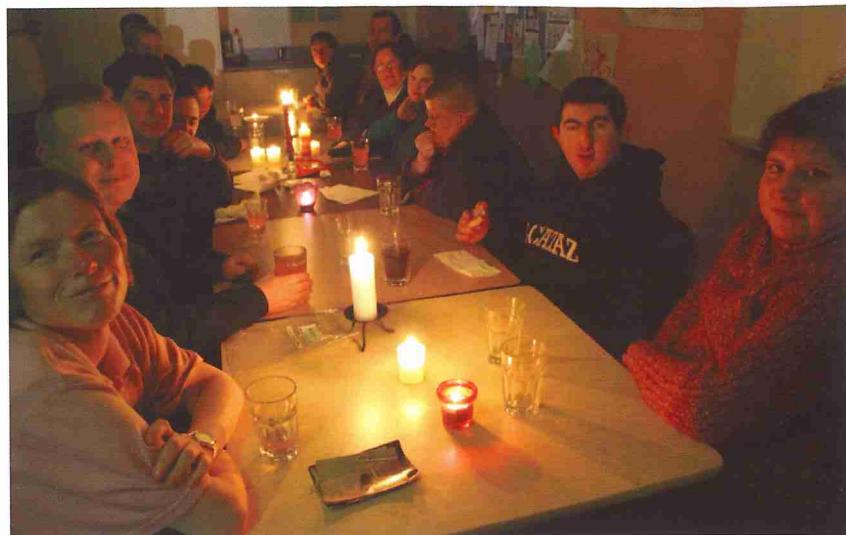
Established in 2003 by the Sisters of The Little Company of Mary (LCM), The Mary Potter Trust Foundation provides grants to community groups in Australia that actively work towards addressing the human rights and social justice needs of the disadvantaged.

"I believe that our grants, mainly to those small organisations working at community level, demonstrate our on-going legacy of the vision of our Foundress Mary Potter," says Sister Marie Therese Nilon, a Little Company of Mary sister, Trustee, and a Projects Committee Member of the Foundation. "As a practical woman and no stranger to suffering herself, she responded with compassion to the spiritual and social situations of the needy, irrespective of race, or religion. Now this Foundation has become an important expression of our inheritance generating hope and creating new opportunities for many on the social margins."

The commitment of the LCM Sisters to work with those from diverse communities to restore their dignity and hope is at the centre of the Foundation's grantmaking philosophy. When assessing applications for grants, one of the key requirements is that the application is being made by a community group or organisation and involves the members of the community in the management and decision-making processes of the group.

The Foundation provides grants of up to \$15,000 per applicant each funding round. Priority is given to seed funding, especially for projects that are innovative in approach and can demonstrate sustained outcomes past the period of funding. The requests for funding range from \$5,000 to \$15,000. For many of the smaller community organisations that apply to The Mary Potter Trust Foundation, it is seen as one of the few grantmaking bodies that offer them hope. The most heartfelt thanks for help provided often come from the smaller community organisations.

Many of the organisations are not 'high profile' or able to offer any long term strategic partnerships which most of



Family Resource and Network Services (FRANS) Financial Assistance Program, NSW.

the larger grantmakers are seeking. These community based groups often have only one or two paid staff and are mainly able to achieve extraordinary results through the small army of volunteers that support them. They operate at the grass roots level, servicing primarily the local communities in which they are located and therefore ideally suited to understand their needs.

A grant of \$10,000 or \$15,000 for some groups can mean the delivery of a new program for up to a year in some cases.

The provision of a grant from The Mary Potter Trust Foundation has also assisted to secure grants from other grantmaking bodies. The Foundation will consider being part of a number of supporters of a project and will undertake co-funding to ensure the success of a project. Sometimes a possible funder may be uncertain about a small organisation or particular project, especially if it is a pilot project. By receiving some funding from the Foundation, a co-funder may feel more relaxed about making a grant to the group. This is especially true of government bodies which will generally not put money into an untried methodology, but once a project has been able to demonstrate successful outcomes, it will consider providing some funding.



Incite Youth Arts Inc. – Imagine Alice and Arts Focus Project, NT.

The Foundation carries out due diligence when reviewing applications for funding and has a number of 'checks' in place in order to ensure that the organisation they are providing a grant to is bona fide and capable of carrying out the project. But the Foundation is also cognisant of the fact that some of these organisations and groups are staff and time poor, with the person that administers the program answering the phone and also writing the application in some instances, so the utmost is done to keep the process from being too onerous.

This 'multi-skilling' by staff also presents its challenges for the Foundation. When chasing up additional details or clarification in relation to an application, it can sometimes take a 'few' phone calls before contact is successfully made!

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Philanthropy Australia Inc

Assn. No. A0014980 T
ABN 79 578 875 531

Head Office

Level 10, 530 Collins St
Melbourne Victoria 3000
Australia

Tel (61 3) 9620 0200
Fax (61 3) 9620 0199

info@philanthropy.org.au
www.philanthropy.org.au

Sydney Office

Suite 402, Level 4
105 Pitt Street
Sydney NSW 2000

Tel (61 2) 9223 0155
Fax (61 2) 9223 0877

l.burton@philanthropy.org.au
www.philanthropy.org.au

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