

2024 Annual Review



# Philanthropy Australia is the peak body for philanthropy in Australia.

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# **Acknowledgement of Country**

Philanthropy Australia acknowledges the Australian Aboriginal and Torres Strait Islander peoples as the first inhabitants of the nation and the Traditional Custodians of the lands where we live, learn and work. We pay our respects to Elders past and present.





Our vision

A generous and inclusive Australia

Our purpose

To inspire more and better philanthropy

# Membership



# A message from the Co-Chairs and CEO

# In looking back on 2024, we reflect on the year as one of considerable domestic and global challenges.

Concerning issues such as rising inequality, escalating climate disaster and regional conflicts are having significant implications here in Australia.

On the positive side, philanthropy is working together more than ever, with the Investment Dialogue for Australia's Children (IDAC), Partnerships for Local Action and Community Empowerment (PLACE) and the She Gives campaign all great examples of collaboration in action. In the community foundations space, we have seen wonderful growth in the number of new community foundations and important legislative change to support this growth.



An absolute highlight of the year was the record-breaking Philanthropy Australia Conference in Adelaide, themed 'Shifting Perspectives, Shifting Practice' from 5–7 August. The conference was sold out, with more than 1,000 people in attendance. The Premier of South Australia, the Hon Peter Malinauskas MP opened proceedings and welcomed registrants to Adelaide.

In addition to the conference proper there was a masterclasses day and many side events and activities. We give particular thanks to the SA Conference Leadership Group for their strategic guidance, input and support which helped ensure our most successful conference to date. In March, we farewelled CEO Jack Heath AM. Jack became a Member of the Order of Australia (AM) in the Australia Day Honours 2024 "for significant service to community health and to social welfare". We thank Jack for the significant contribution he made to Philanthropy Australia over three years including: leading the development of our 2022-25 Strategic Plan and securing strategic partners to deliver on the plan; year on year membership growth; helping to put philanthropy on the Federal Government agenda with the Government's adoption of Philanthropy Australia's goal to double giving by 2030 as outlined in our philanthropy blueprint; helping to secure DGR1 for Community Foundations; completing our first Reconciliation Action Plan and supporting the establishment of the First Nations Governance Committee; significantly advancing our advocacy/policy agenda; and delivering two excellent Conferences and a Philanthropy Meets Parliament Summit.

In April, we held the 2024 Australian Philanthropy Awards showcase evening in Sydney, which was a sold-out event. We were delighted with the engagement by the not-for-profit and philanthropic sectors in the awards, with a doubling of nominations compared to the previous awards. Our sincere thanks to all those who spent time preparing their entries, to our independent judging panels and to our award partners.

The 2024 Philanthropy Australia Annual General Meeting in May saw the appointment of four new Board directors – Georgina Byron AM, Brian Wyborn, Jo Taylor and Tyson Feng – while we farewelled Tabitha Lovett and thanked her for her extensive Board service.

Also in May, we announced a new major strategic partnership with Minderoo Foundation, a systems-led philanthropic organisation based in Perth. Minderoo Foundation joined Philanthropy Australia's existing strategic partners: Paul Ramsay Foundation, Perpetual, Equity Trustees, Lord Mayor's Charitable Foundation, Snow Foundation and an anonymous philanthropic organisation.

In June, the Philanthropy Australia Board and staff team welcomed Maree Sidey as the new CEO. Maree joined Philanthropy Australia after nine successful years as CEO of Australian Communities Foundation (ACF). Maree commenced her tenure with "meet the CEO" events in state capitals and several events in Brisbane for Queensland Philanthropy Week.

It was a busy year for our policy advocacy work. In July we welcomed the tabling in Parliament of the final report of the Productivity Commission's 'once in a generation' philanthropy inquiry, Future Foundations for Giving. In early December, we also welcomed the Assistant Minister for Charities, the Hon Andrew Leigh MP, announcement of a number of changes flowing from recommendations in the final report.

Also in early December, we lodged our final submission in response to draft ministerial guidelines for a new DGR category for 'community charities'. The Guidelines are the final component necessary before the new DGR category can commence. Secured through the advocacy of Philanthropy Australia, Community Foundations Australia and our members and partners, this significant reform will make it easier for community foundations to receive funds, including from private ancillary funds, and to facilitate granting to organisations and groups without DGR status.

In November, a group of Philanthropy Australia members completed an enriching study tour in the UK. The members had a full itinerary, with sessions with more than 40 speakers from 20+ organisations sharing best practice and deep understanding of the many ways philanthropy is making a difference today.

In late 2024 we restructured the organisation to create four business units led by an executive team: Policy and Sector Development, Partnerships and Practice, Membership and Engagement, and Business Services.

Throughout the year, we delivered a broad program of learning through workshops and webinars held both online and in person. In addition, our more than 10 peer networks met regularly for collaboration and learning across topics such as affordable housing, the arts and First Nations-focused philanthropy.

We thank our strategic funders, champions, members, Board, staff and other stakeholders for being part of the story of philanthropy this year and for elevating philanthropy's impact in Australia. Collectively, we have strengthened the sector, helped address Australia's most pressing issues, influenced government policy, enhanced practice and boosted the philanthropic ecosystem.

We thank everyone who contributed to the substantial achievements and successes of Philanthropy Australia in 2024 – we very much hope that you will continue on the journey with us in the years ahead.



Amanda Miller OAM
Co-Chair



Lisa George Co-Chair



Maree Sidey CEO

# Strategic Plan

The 2022–2025 Philanthropy
Australia Strategic Plan sets
out to inspire more and better
philanthropy across Australia for
the benefit of humanity.

Our work is guided by 5 strategic pillars:

- 1 Engage with a larger and more diverse audience.
- 2 Inspire a new wave of philanthropy through stories and campaigns.
- 3 Foster better giving through accessible guidance, tools and information.
- 4 Advocate for policy, regulatory and other reform to unlock the potential of giving in Australia.
- 5 Invest in our people, processes and systems to create an efficient, effective and sustainable business.



# Key achievements

# Policy advocacy activities

As the peak body for philanthropy, Philanthropy Australia proactively advocates for outcomes that help grow giving and its impact.

We work closely with governments, elected representatives and officials to foster a policy and regulatory environment that encourages giving in its diverse forms.

2024 was a busy year for Philanthropy Australia, as we actively engaged in a number of policy development processes.

Sam Rosevear concluded in the role of Executive Director of Policy, Government Relations and Research, with Krystian Seibert returning to Philanthropy Australia to take on this position. Most recently, Krystian had served as an Associate Commissioner jointly leading the Productivity Commission's philanthropy inquiry.

# Productivity Commission Inquiry in Philanthropy

The Productivity Commission inquiry into philanthropy concluded in May, with its final report, Future Foundations for Giving, released by the Australian Government in July. It contained numerous findings and recommendations, many of which were shaped by Philanthropy Australia's advocacy.

The report recommended a major overhaul of the deductible gift recipient (DGR) system, which determines which charities are eligible to receive tax deductible donations, to broaden access and make it simpler for charities and donors. This has been a key advocacy priority for Philanthropy Australia, so it was pleasing to see the inquiry report strongly backing reform.

Philanthropy Australia welcomed the report and the Australian Government's re-affirmed commitment to double giving by 2030, and the Assistant Minister's statement that the Commission's report will play a key role in achieving this objective.

Between August and November, we engaged with our members to help shape our response to the report and seek input into our advocacy priorities. This included holding roundtables online and in Brisbane, Melbourne, Adelaide, Perth and Sydney.

In December, the Assistant Minister for Charities, the Hon Andrew Leigh MP, announced a number of initial changes flowing from recommendations in the report. These included removing the \$2 threshold for claiming a tax-deductible donation to a DGR entity and renaming ancillary funds as 'giving funds'. Consultation on a possible increase in the minimum distribution for ancillary funds was also foreshadowed.

Philanthropy Australia's response recognised this positive signal of interest in the report's recommendations. However, we also stated that these first steps were not the significant reforms needed to grow giving in Australia and expressed caution about changes to the minimum distribution given the risk of unintended consequences.

# New DGR Category for Community Foundations

2024 also marked the conclusion of the extensive engagement undertaken to implement a new DGR category for community foundations, with draft ministerial guidelines released for consultation in November. The Guidelines were the final component necessary before the new DGR category could commence, and Philanthropy Australia's submission in response to the guidelines was made in December.

Secured through the advocacy of Community Foundations Australia, Philanthropy Australia, and our members and partners, this significant reform will make it easier for community foundations to receive funds, including from private ancillary funds, and to facilitate granting to organisations and groups without DGR status.

# Philanthropy Australia Conference 2024: Shifting Perspectives, Shifting Practice

The 2024 biennial conference was held from 5–7 August in Adelaide, on the lands of the Kaurna people.

This was the first time the conference had been held outside Melbourne or Sydney and resulted in the largest attendance numbers in the organisation's history, with more than 1,000 registrants in attendance plus 200-plus watching the plenary sessions online.

The event hosted more than 170 speakers and facilitators, 12 masterclasses, 21 concurrent sessions, 24 side events and a dinner attended by 500 people.

Masterclasses Day on 5 August had 6 morning and 6 afternoon masterclasses on a range of engaging topics.

Day 1 of the conference proper on 6 August kicked off with a Welcome to Country by Uncle Major "Moogy" Sumner AM and Cliffy Wilson, followed by a welcome address by Premier of South Australia, the Hon Peter Malinauskas MP. Assistant Minister for Competition, Charities, Treasury and Employment, the Hon Dr Andrew Leigh MP, spoke following the Premier.

Day 2 of the conference was opened by Professor Kristy Muir, CEO of the Paul Ramsay Foundation in conversation with the Hon Amanda Rishworth MP, Minister for Social Services. At the conclusion of the day, Philanthropy Australia Co-Chairs Amanda Miller OAM and Lisa George closed proceedings and announced that the next conference will be held in Brisbane on 8–10 September 2026.

Feedback was supportive and acknowledged the breadth of topics covered in masterclasses, plenary and concurrent sessions. Delegates noted the diverse and inclusive cross-section of contributors speaking about important questions and providing meaningful discussions.

Philanthropy Australia thanks all those who attended the conference and contributed their insights as speakers, partners or audience members.

View summary video about the conference.



Conference feedback included: "Philanthropy in Australia is growing. It is becoming more collaborative and understanding that a relationship of equality and trust between donor and the organisation they are supporting with long-term, unrestricted funding is the way real change will happen. I felt very heartened by the atmosphere at the conference."





# Thank you to our conference partners

# Major partners

- Nunn Dimos Foundation
- Ord Minnett

# **Principal partners**

Business Events Adelaide | South Australian Tourism | Government of South Australia – Department of the Premier and Cabinet | Adelaide Convention Centre

# Diversity and Representation partner

· Perpetual

# Supporting partners

- · Australian Ethical
- · benevity
- · Evans & Partners
- Fay Fuller Foundation
- Government of South Australia Human Services | Government of South Australia – SA Housing Authority
- James & Diana Ramsay Foundation
- JANA
- Wyatt

# **Program partners**

- AIDN Australian International Development Network
- Australian Government | Creative Australia
- The Ross Trust

# Dinner partner

• The University of Adelaide



Above left to right: Charlotte Siddle, Resource Gen and Siddle Family Foundation, and Tyson Fenay, Philanthropy Australia New Gen Network, discussed Next Gen giving



Above left to right: Lisa George and Amanda Miller OAM, Co-Chairs of Philanthropy Australia, Premier of South Australia The Hon Peter Malinauskas MP and Maree Sidey, CEO of Philanthropy Australia



**Above left to right:** Former Philanthropy Australia CEOs Louise Walsh and Sarah Davies AM, with Maree Sidey

# Australian Philanthropy Awards 2024

The Australian Philanthropy Awards 2024 recognised and celebrated extraordinary achievements in contemporary philanthropy.

The Awards opened for nominations on 7 December 2023 and closed on 25 February 2024. The engagement by the not-for-profit and philanthropic sectors with the awards was strong, and we recorded a doubling of nominations compared to the previous awards.

The <u>finalists</u> were announced on 3 April and the <u>award recipients</u> announced at the showcase event on the evening of Tuesday 16 April at the Art Gallery of NSW. The showcase event in Meers Hall sold out and was attended by more than 280 people.

Thank you to the entrants, finalists, recipients, partners, <u>independent judging panels</u> and all involved.



# 2024 Award recipients

- Collaboration Award (two recipients):
   Voices for Impact, and Preventing mental health issues in young Australians: a social impact collaboration
- Community Philanthropy Award –
   presented in partnership with Community
   Foundations Australia, Australian
   Communities Foundation, Foundation
   for Rural and Regional Renewal and Lord
   Mayor's Charitable Foundation: Amplify
   Pride Fund
- Environmental and Climate Philanthropy Award – presented in partnership with the Australian Environmental Grantmakers Network: Climate 200
- First Nations Philanthropy Award –
   presented in partnership with Ninti
   One Ltd: Bibbulmun Fund and WA Relief
   and Recovery Fund (held with the
   Fremantle Foundation)

- Innovation Award: Climate 200
- International Philanthropy Award

   presented in partnership with the

   Australian International Development
   Network: Cambodian Children's Fund –
   Neeson Cripps Academy
- Inclusion Award: The Damion Drapac Centre and Damion Drapac Scholarships for Vocational Doctors
- Leadership Award presented in partnership with Macquarie Group: Terry Snow AM and Ginette Snow
- The Eve Mahlab AO Gender-wise Philanthropy Award – presented in partnership with Australians Investing in Women: MECCA M-POWER

# Key achievements continued:

Telescope: The second annual Philanthropy
Australia Better Philanthropy Telescope
report was launched in February 2024. This
community-created report took the pulse of
the sector in late 2023. Members and interested
others were invited to complete the 6-question
survey, with responses being anonymous.
116 people participated from across Australia
and overseas, and they came from a mix of
organisation types. All the Telescope reports
can be viewed on the Better Philanthropy
Telescope webpage.

Study tour to the UK: From 19 to 25 November, Philanthropy Australia ran a successful study tour for 20 funder members, plus staff, to London, UK. Participants heard from more than 40 speakers from 20+ organisations including leading foundations, impact investors and thought leaders. The tour included presentations, roundtables, facilitated sessions and site visits.



**Above:** The participants in the November 2024 study tour to London

# Philanthropy Australia is the host or partner organisation for a variety of entities

The Foundations Group for Impact Investing (FGII) launched in 2023 to help improve the supply and demand for impact capital. They achieve this by convening foundations and charitable funders who are interested in starting or enhancing their impact investing activities. At year's end FGII had more than 50 member organisations, representing 100+ individuals and more than \$10 billion in funds.

The Learning & Evaluation for Australian Funders (LEAF) Network, previously known as the Phil Eval Network, is a member-driven community that empowers Australian funders with the knowledge, skills, resources and connections to use Measurement, Evaluation and Learning (MEL) to drive better philanthropy. By the end of 2024 LEAF had grown to more than 100 members.

NEXUS Australia was established in 2013 thanks to a collaboration between the Foundation for Young Australians and leading Australian philanthropists. Since then, the entity has connected the intellectual, creative, financial and social capital of hundreds of members to lead social change. The NEXUS Australia Committee has 12 volunteer members. NEXUS Australia is structurally hosted and supported by partner, Philanthropy Australia. The focus for 2024 for NEXUS Australia was the lead up to their March 2025 Summit.

The She Gives campaign was officially launched in Melbourne on 24 July and Sydney on 25 July 2024. The campaign was founded by Melissa Smith from Noble Ambition with an Advisory Committee of leading women philanthropists and sector leaders. The campaign seeks to highlight the catalytic potential impact of women's giving and harness the collective power, networks and ambition of Australian women to accelerate positive social change in the face of growing need.

# First Nations Engagement

# Philanthropy Australia First Nations Governance Committee

In May 2024, Philanthropy Australia announced its expanded First Nations Governance Committee (FNGC), a Board Sub-Committee. The First Nations Governance Committee's purpose is to inform and guide the Board, particularly in the context of First Nations Peoples' communities, but also in the context of the wider Australian population. Listed below are the members of the committee as at 31 December 2024:

Aboriginal and Torres Strait Islander members:

- Leah Armstrong, "Ancestry from Boigu Island in the Torres Strait"
- Mundanara Bayles, "Wonnarua/Gweagal/ Gungalu/Wiri"
- Robert Brittain, "Ballardong Noongar/Gija Man"
- Jessica Bulger, "I am Wiradjuri from Tumut and Brungle"
- Kim Collard, "I am Balladong/Whadjuk man of the Noongar Nation (Noongar the people of the southwest of WA)"
- Stephanie Harvey, "Bidjara"
- Warren Miller, "Wirangu, Kokatha and Mirning"
- Michelle Steele, "Kamilaroi/Gomeroi Nation from Moree NSW"
- Phil Usher, "My mob is Wiradjuri".

Philanthropy Australia Board representatives:

- Amanda Miller OAM (Philanthropy Australia Co-Chair)
- Jon Cheung (past Philanthropy Australia Board member)
- Lisa George (Philanthropy Australia Co-Chair)
- Stacey Thomas (Philanthropy Australia Board member).

We thank Brian Wyborn "Ancestry from Boigu Island in the Torres Strait" for his service and chairing between May and December 2024.

### **First Nations Funders Network**

From its beginnings in 1999 as the Indigenous Affinity Group, our First Nations Funders Network (FNFN) has grown considerably. The network's purpose is to create opportunities for more philanthropic funds to be directed towards First Nations communities and organisations, and to promote better practice to support meaningful relationships that lead to significant outcomes.

In 2024 Philanthropy Australia introduced Terms of Reference for the FNFN and asked members of the network to sign up to these. By agreeing to the terms, funders commit to being part of meaningful change for First Nations peoples of Australia.

# Philanthropy Australia Aboriginal and Torres Strait Islander Funders Reporting Survey

The survey was launched at the August 2024 Philanthropy Australia Conference and aimed to form the first ever baseline of the funding landscape in Australia for Aboriginal and Torres Strait Islander led or controlled organisations and programs.

The survey results will be turned into a report, made available as an asset for Philanthropy Australia's members and the broader community.

### **Reconciliation Action Plan**

In July 2023, Philanthropy Australia launched our Reflect Reconciliation Action Plan (RAP) representing our joining of the RAP program. There are 4 RAP types – Reflect, Innovate, Stretch and Elevate – allowing RAP partners to continuously develop and strengthen reconciliation commitments in new ways.

In the latter part of 2024 Philanthropy Australia submitted the report on our Reflect RAP to Reconciliation Australia. The FNGC agreed to create a sub-group to advise and shape the Innovate RAP in 2025.

# Learning sessions

In 2024, Philanthropy Australia delivered a wide range of learning sessions for our members and others – online and in-person.

The following sessions were of note:

- We delivered a series of webinars on the topic of diversity, including cultural diversity and philanthropy, gender and philanthropy, and disability and philanthropy.
- In mid-year we ran 'Meet the new CEO' events in various states for members to be introduced to Maree Sidey.
- In the latter part of the year, we partnered with JBWere and state-based organisations to present 'The Bequest Report – passing on more than assets' around Australia. John McLeod, Senior Research Consultant, JBWere Australia and author of The Bequest Report spoke at each of these sessions along with local experts.
- End of year celebrations in Perth, Adelaide, Sydney, Melbourne and Brisbane.

# Peer networks

Philanthropy Australia <u>peer networks</u> are communities of practice for learning, which also engender collaboration amongst network members.

At year's end, there were:

- 2 peer networks based on member type
  - Family Foundations
  - Corporate Philanthropy
- 7 active national peer networks based on topic area or approach
  - Affordable Housing
  - Arts
  - Disability
  - Education
  - First Nations
  - Jobs and Skills
  - Social Enterprises
- 1 role-based peer network
  - Communications
- 3 state-based funder peer networks
  - Queensland funders
  - SA funders
  - WA funders.

See also the sections on FGII, LEAF and NEXUS Australia in this Annual Review.



# Board and Sub-Committee members\*

### **Board**

Amanda Miller OAM, Co-Chair

Lisa George, Co-Chair

Alexandra Dimos

Brian Wyborn,

appointed 22 May 2024

Georgina Byron AM,

appointed 22 May 2024

Jo Taylor,

appointed 22 May 2024

John McLeod

Kirsty Allen

Kristen Stevenson

Liz Gillies

Maree Sidey,

resigned 5 February 2024

Michael Graf

Stacey Thomas

Tabitha Lovett,

resigned 22 May 2024

Tyson Fenay,

appointed 22 May 2024

# Finance Audit Risk and Compliance Committee

Asha Puvan

Ben Carroll,

appointed 10 December 2024

Jon Cheung

Kirsty Allen,

resigned 22 May 2024

Kristen Stevenson

Michael Graf

Pearce Delphin

Tyson Fenay,

appointed 19 June 2024

# **Governance Committee**

Amanda Miller OAM

Georgie Byron,

appointed 10 December 2024

Kirsty Allen,

appointed 19 June 2024

Lisa George

Tabitha Lovett,

resigned 22 May 2024

# Membership and Engagement Committee

Alexandra Dimos

John McLeod

Michael Graf

# Policy and Research Committee

Alexandra Williams, appointed 23 May 2024

Glen McCrea,

appointed 23 May 2024

Jo Taylor,

appointed 19 June 2024

Jo Barraket,

resigned 22 February 2024

Joe Skrzynski AO,

resigned 5 June 2024

John Daley

Libby Ward-Christie,

appointed 23 May 2024

Liz Gillies

Maree Sidey,

resigned 5 February 2024

Sacha Edema

Stacey Thomas

Tabitha Lovett,

appointed 22 May 2024

\*See page 12 for the First Nations Governance Committee

# Financial summary 2024

|                         | Restricted    | Unrestricted  | Total         |
|-------------------------|---------------|---------------|---------------|
| Income                  | \$1,362,379   | \$6,410,542   | \$7,772,921   |
| Expenditure             | (\$1,451,466) | (\$5,979,764) | (\$7,431,230) |
| Total Surplus (Deficit) | (\$89,087)    | \$430,778     | \$341,691     |



# Thank you to our 2024 partners

We would like to acknowledge and thank our Strategic Partners and our Philanthropy Champions for their generous support. These names are as at 31 December 2024.

# Strategic partners

- Paul Ramsay Foundation
- Minderoo Foundation
- · Perpetual
- · Equity Trustees
- Lord Mayor's Charitable Foundation
- · Snow Foundation
- An anonymous philanthropic organisation

# Philanthropy Champions

- AMP Foundation
- · Collier Charitable Fund
- · Fay Fuller Foundation
- · Lisa George
- · Heath Family Fund
- Helen Macpherson Smith Trust
- Macquarie Group Foundation
- McLean Family Foundation
- · McLeod Family Foundation
- · Amanda Miller OAM
- Sidney Myer Fund and The Myer Foundation
- Skip Foundation
- Snow Foundation
- The Ross Trust
- The Skrzynski Family Sky Foundation
- The William Buckland Foundation
- Tim Fairfax AC
- Trawalla Foundation
- Vincent Fairfax Family Foundation
- W&A Johnson Family Foundation
- Wheelton Philanthropy

# State Champions/ Partners

### Western Australia

- Lotterywest
- Bibbulmun Fund
- · Gilbert George
- · Spinifex Trust
- The Sir Frank Ledger Charitable Trust
- The Stan Perron Charitable Trust
- Wind Over Water Foundation
- Ungar Family Foundation

# Queensland

• Tim Fairfax Family Foundation

### **South Australia**

• Fay Fuller Foundation

# Office partners

Adelaide: The Wyatt Trust
Brisbane: Hand Heart
Pocket Foundation

# Pro Bono partners

- · Herbert Smith Freehills
- · Seer Data & Analytics



# Patrons and Life members

### **Patrons**

Sir Gustav Nossal AC CBE Lady Southey AC

### Life members

Dame Elisabeth Murdoch AC DBE (1909–2012)

Dr Michael Liffman AM

**Emeritus Professor** 

Myles McGregor Lowndes

Lady Southey AC

Mr Ben Bodna AM

(1935-2008)

Mr Charles Goode AC

Mr Darvell Hutchinson AM

(1930-2022)

Ms Jill Reichstein OAM

Ms Meriel Wilmot-Wright

Ms Patricia Feilman AM

(1925-2008)

The Stegley Foundation

Mr David Gonski AC

Ms Gina Fairfax AC

Mr Tim Fairfax AC

Ms Paula McLean

Mr Robert McLean AM

Ms Ann Johnson

Mr Alan Schwartz AO

# Corporate information

# Contact

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## Melbourne

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### Sydney

Yirranma Place, 262 Liverpool Street, Darlinghurst NSW 2010

# Adelaide

Inparrila, 161 Frome Street, Adelaide SA 5000

## Brisbane

Level 1, 826 Ann Street, Fortitude Valley QLD 4006

### Perth

136 Stirling Highway, Nedlands WA 6009

