





2023 Annual Review

PHILANTHROPY
AUSTRALIA





Philanthropy Australia is the peak body for philanthropy in Australia.



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We acknowledge and pay our respects to the past and present traditional Custodians and Elders of the country on which we work. We also accept the invitation in the Uluru Statement from the Heart to walk together with Aboriginal and Torres Strait Islander peoples in a movement of the Australian people for a better future.





Our vision

A generous and inclusive Australia

Our purpose

To inspire more and better philanthropy

Values and behaviours

→ Respect

- We respect the inherent dignity of each and every human and each individual's skills, experience and contribution.
- We acknowledge the special connection of First Nations' Custodians to the lands and waters on which we work and pay our respects to First Nations Custodians and Elders past and present.
- We value when people give of their time, treasure, talent, and ties, to good causes.

→ Trust

- We create welcoming environments that are safe, inspiring, and fun.
- We are caring and direct in our conversations, accountable for our decisions, and do what we say we'll do.
- We are committed to deepening trust between donors, service providers and beneficiaries.

→ Humility

- We don't have all the answers and we look to learn from others.
- We grow from our mistakes and our vulnerabilities.
- We carve out time to be still and listen deeply.

→ Impact

- We encourage philanthropy that makes a real and lasting difference by supporting organisations in their programs, capacity, and advocacy.
- We practice, and foster, collaboration as we build connections for greater impact.
- We encourage funders to be strategic, catalytic, and responsive to need in their giving.

→ Celebration

- We promote the joy of philanthropy and profile inspiring philanthropy.
- We celebrate and build a culture of learning.
- We create space for all voices to be heard and celebrated.

→ Sharing

- We practice, and encourage, the timely sharing of information, knowledge, experience, and expertise.
- We work as one Philanthropy Australia team with a shared commitment to our vision, purpose and values.
- We share our appreciation with those who support and enable our work.

A message from the Co-Chairs

In 2023 Philanthropy Australia made substantial strides in our quest to inspire more and better philanthropy.

The year commenced with the distribution of the results of our inaugural Better Philanthropy Telescope report. The report collated and synthesised the more than 100 responses received to our Telescope survey about the issues that would shape the giving agenda in 2023. We highlighted the five big world issues that were top of mind for respondents: housing, climate change, the economic downturn, First Nations peoples and systems change.

There was considerable activity during the year in the lead up to the referendum to alter the Constitution to recognise the First Peoples of Australia by establishing an Aboriginal and Torres Strait Islander Voice. In line with our public policy statement policy, we consulted and surveyed our membership and issued a public statement in support of the Yes case. The statement was issued on 5 April 2023. History records that the Referendum was not passed.

At our Annual General Meeting in May, we farewelled and thanked outstanding Board directors Joseph Skrzynski AO and Jon Cheung as we welcomed new Board directors Alex Dimos and Kristen Stevenson. Amanda Miller OAM and Kirsty Allen were re-elected to the Board. We also thank Ling Ang and Anthony Cavanagh who stepped down from the Board in June.

The Productivity Commission (PC) launched its inquiry into philanthropy this year. Our policy and government relations program worked diligently to canvas member views about the inquiry's terms of reference and to research and write the Philanthropy Australia submission to the inquiry, which was submitted to the PC in early May 2023. National polling revealed very strong support across the community for the key elements in Philanthropy Australia's submission. In December the PC released its draft report, with responses to this due in early February 2024 ahead of the PC final report to Government in May 2024.



An undoubted highlight of the year was our Philanthropy Meets Parliament Summit 2023, held at Parliament House, Canberra in October. Registrations sold out well ahead of the event and we received much positive feedback.

The audience of 280 stakeholders saw presentations and panels across the topics of our government relations and advocacy work. One session of note brought together parliamentarians from across the parties and independents for a broad ranging and collaborative discussion of the double giving agenda. At the Summit, we launched a commissioned report of economic modelling on the huge potential of super bequests, and a compilation of 33 inspiring stories of giving. The Summit concluded with a powerful and inspiring reflection on the outcome of the Referendum.

In addition to our Summit and planning for the 2024 Philanthropy Australia Conference, to be held in Adelaide, our learning and content program delivered a number of informative webinars and events for our members across a wide range of topics. Highlights include (by are not limited to) the launches of the Gender Compass (in partnership with Plan International and Australians Investing in Women) and the Climate Lens (in partnership with the Australian Environmental Grantmakers Network, AEGN).

In late 2023 we provided a submission to the Federal Government's Charity Blueprint process. The submission outlined seven of the top priority reforms sought by the philanthropic sector.

In early December, we celebrated the 400th edition of our ebulletin for members and friends – Philanthropy Weekly. Subscriptions to Philanthropy Weekly continued to grow, as did engagement with the news and stories.

We ended the year with the announcement that our CEO Jack Heath had decided to finish up as CEO in March 2024. We thank Jack for the significant contribution he has made to Philanthropy Australia over the past 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.

We look forward to building on the momentum from 2023 with our incoming CEO, Maree Sidey. Thank you for your continued support of Philanthropy Australia.



Amanda Miller
Amanda Miller OAM
Co-Chair



Lisa George
Lisa George
Co-Chair

Strategic Plan

The [2022–2025 Philanthropy Australia Strategic Plan](#) sets an ambitious growth agenda 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 and advocacy work

As the peak body for philanthropy, Philanthropy Australia undertakes policy advocacy and works closely with governments to support more and better giving in Australia.

In the lead up to the last Federal election, Philanthropy Australia worked proactively to secure the historic election commitment that an Albanese Government would work with the philanthropic, charity and business sectors to develop a Strategy to Double Giving by 2030. In the October 2022 budget, the Federal Government announced that it would ask the Productivity Commission (PC) to conduct an inquiry to identify opportunities to grow giving and provide a roadmap to implement the double giving agenda. The PC inquiry commenced in 2023 with a timeline to give the final report to the Federal Government in May 2024.

Philanthropy Australia engaged extensively across government to make the case for action to lift giving, and for adopting major reforms such as expanding DGR status to more charities. We engaged with the PC Commissioners and staff team, Charities Minister Dr Leigh, departments such as Treasury, and Prime Minister and Cabinet, and a suite of Ministerial advisers. We built support for the agenda through meetings with individual MPs from all parties in the Parliament, and with Independent MPs.

We ran member consultation and information webinars throughout the PC inquiry process and also gave opportunities for members to give their views. The Philanthropy Australia submission to the inquiry 'A Strategy to Double Giving by 2030' was submitted in early May 2023. This work built on our national

polling about key elements in Philanthropy Australia's submission, which showed strong public support. In July 2023, we submitted a supplementary submission about the potential of an advertising campaign to lift philanthropic giving entitled 'Is there a role for Government in supporting a National Giving Campaign?'

Also In July 2023, we published our joint submission to the PC Inquiry with Community Foundations Australia entitled 'The opportunity to grow Australia's community foundation network: A strategic roadmap' and with the subtitle "How community foundations can accelerate philanthropic giving and support better outcomes for communities across Australia'. The Government is establishing DGR 1 status for all Community Foundations, following on from advocacy and policy work by Philanthropy Australia and Community Foundations Australia.

In October 2023, at the Philanthropy Meets Parliament Summit (see following pages), Philanthropy Australia launched an [economic modelling report](#) by Impact Economics and Policy 'Making Giving easy: Charitable Superannuation Bequests'. The commissioned report outlined the significant potential of a simpler approach to giving a bequest from excess superannuation funds upon a person's death.

In December 2023, the PC released its draft report and Philanthropy Australia published a response to the draft report to help inform our members. The responses to the draft report were due in February 2024. Philanthropy Australia also appeared at the in-person sessions of the PC inquiry.

All Philanthropy Australia's 2023 submissions can be [viewed here](#).



Philanthropy Meets Parliament Summit 2023

The 2023 Philanthropy Meets Parliament Summit was held at Parliament House, Canberra on 24 October. The event was themed 'Philanthropy and Government Working Together to Double Giving'.

Philanthropy Australia usually hosts a parliamentary summit every two years, but the 2023 event was our first Summit since before the COVID-19 pandemic. Ministers the Hon Dr Andrew Leigh MP and the Hon Amanda Rishworth MP, along with other key sector speakers, addressed a packed theatre of 280 not-for-profit and philanthropy leaders throughout the day in individual presentations and panel discussions.

The agenda featured sessions on reform proposals, an update from the Productivity Commission about the Inquiry on Philanthropy, views from across the political spectrum on double giving, a preview of the proposed national giving campaign, case studies of how philanthropy is working with government to achieve impact and a thoughtful reflection on First Nations philanthropy.

As referenced on page 7, Philanthropy Australia launched a commissioned [economic modelling report](#) by Impact Economics and Policy 'Making Giving easy: Charitable Superannuation Bequests'.

Philanthropy Australia also launched a publication featuring 33 case studies in 'Inspiring stories of giving: volume 1'. These stories highlighted the way philanthropy and government can work together to help address pressing issues in our communities.

The Summit also featured and launched a [short video](#) about eminent medical researcher Professor Ian Frazer AC and his work to develop a cervical cancer vaccine for human papilloma virus: 'How the cervical cancer vaccine was built of the philanthropy of promise'. The video highlighted the importance of philanthropic support for medical research, particularly early innovation.



It would be fair to say that almost all of the work we did in the first 15 years ... was funded philanthropically. Competitive funding is built on what you have already achieved. But philanthropic funding generally takes the promise of what you think you might achieve and tries to help you get there.

Professor Ian Frazer AC (pictured above) comments about the importance of philanthropy in his medical research to develop a cervical cancer vaccine.



Virginia Haussegger AM was the MC for the Summit.

Presenter at the Summit, then CEO of the Grattan Institute, Danielle Wood. Ms Wood is now Chair of the Productivity Commission.





Member engagement

In 2023, Philanthropy Australia delivered a wide range of webinars and events for our members and others.

Of note are:

- The March event in Adelaide at Government House to help celebrate 10 years of Philanthropy Australia in South Australia.
- Events around Australia in March and April to launch the Climate Lens tool, presented in partnership with the Australian Environmental Grantmakers Network (AEGN). AEGN's Climate Lens was supported by The Robert Hicks Foundation, managed by Equity Trustees, and the Lord Mayor's Charitable Foundation.
- The April panel discussion for members about the Voice to Parliament referendum in Sydney. The panel featured: the Hon Linda Burney MP, Minister for Indigenous Australians; Pro Vice-Chancellor Indigenous UNSW and a Professor of Law, UNSW Law, Cobble Cobble woman Professor Megan Davis; Co-Chair, Australians for Indigenous Constitutional Recognition, Arrernte and Kalkadoon woman Rachel Perkins; and Sally Scales, Chairperson, APY Executive Council.
- The October launch of the Gender Compass research tool (in partnership with Plan International Australia and Australians Investing in Women) and hosted by Perpetual. The research was funded by Trawalla Foundation, Minderoo Foundation and Lord Mayor's Charitable Foundation.



Left to right: Amanda Miller OAM, Co-Chair of Philanthropy Australia, Mr Rod Bunten and Her Excellency the Honourable Frances Adamson AC, Governor of South Australia at the event to celebrate 10 years of Philanthropy Australia in South Australia.



Darrell Wade, Chairman of Intrepid, at the Melbourne launch of the Climate Lens (at right) speaks with AEGN's Amanda Martin OAM.

Philanthropy Australia currently has more than 10 active national [peer networks](#) and three state-based funder peer networks. Some networks provide communities of practice for learning, which also foster collaboration amongst network members. We held a large number of peer network sessions this year.

In 2023 we launched with the sector two new initiatives: **Philanthropy Evaluation** (Phil Eval) and the [Foundations Group for Impact Investing](#) (FGII). FGII is a sector-led initiative (Philanthropy Australia is the secretariat) bringing together foundations and other funders to share practice around impact investing. A secondary aim is to streamline the process for social enterprises and other for-purpose organisations to seek investment finance. Phil Eval is a member-driven network of philanthropic evaluators that empowers Australian funders with the knowledge, skills, and resources to use monitoring, evaluation and learning (known as MEL) to improve funding practices.

This year, planning continued for the 2024 Philanthropy Australia **Conference**, to be held in Adelaide 5–7 August. This will be the first time the conference takes place outside Melbourne or Sydney.

The inaugural [Philanthropy Australia Better Philanthropy Telescope report](#) was launched in early 2023. This is a community-created report driven by members took the pulse of the sector in late 2022. Members and others were invited to complete the 6-question survey, with responses being anonymous. 101 people participated, drawn from across Australia and from a mix of organisation types.

The Telescope report outlined respondents' views around:

- 10 big ideas that would matter in 2023;
- 5 big world issues;
- Influences and restrictors on giving strategies and philanthropy; and
- Opportunities and challenges for 2023.



Reflect 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. Philanthropy Australia’s Reflect RAP will lay the foundations, priming the organisation for future RAPs and reconciliation initiatives.

As the peak national organisation for philanthropy with a quest to inspire more and better philanthropy, we have an opportunity and responsibility to influence and promote a philanthropy that:

- Delivers practical, positive outcomes for Aboriginal and Torres Strait Islander peoples and their communities;
- Supports constitutional recognition and a Voice to Parliament for Aboriginal and Torres Strait Islander peoples; and
- Leads to self-determination for Aboriginal and Torres Strait Islander peoples.



Above: Guests at the April 2023 panel event about the Voice to parliament (see page 10).

The Voice to Parliament referendum

In 2019, Philanthropy Australia coordinated an Open Letter from Philanthropy published in the Australian Financial Review.

62 individual philanthropists and philanthropic foundations expressed support of the Uluru Statement from the Heart, and for the establishment of a First Nations Voice to Parliament enshrined in the Australian Constitution, and for Makarrata, defined as the coming together after a struggle to supervise a process of truth-telling and agreement-making between governments and First Nations people.

Following the election of the Labor Government in May 2022, new Prime Minister Anthony Albanese committed to holding a referendum to enshrine an Indigenous Voice to Parliament in his government's first term of office, acting on the 2017 request of Indigenous leaders for such a body made with the Uluru Statement from the Heart.

Following consultation with members including an online survey, in April 2023 we released a statement on the Voice referendum. Also in April, an alliance of some of Australia's leading philanthropic foundations declared their support for the Voice.

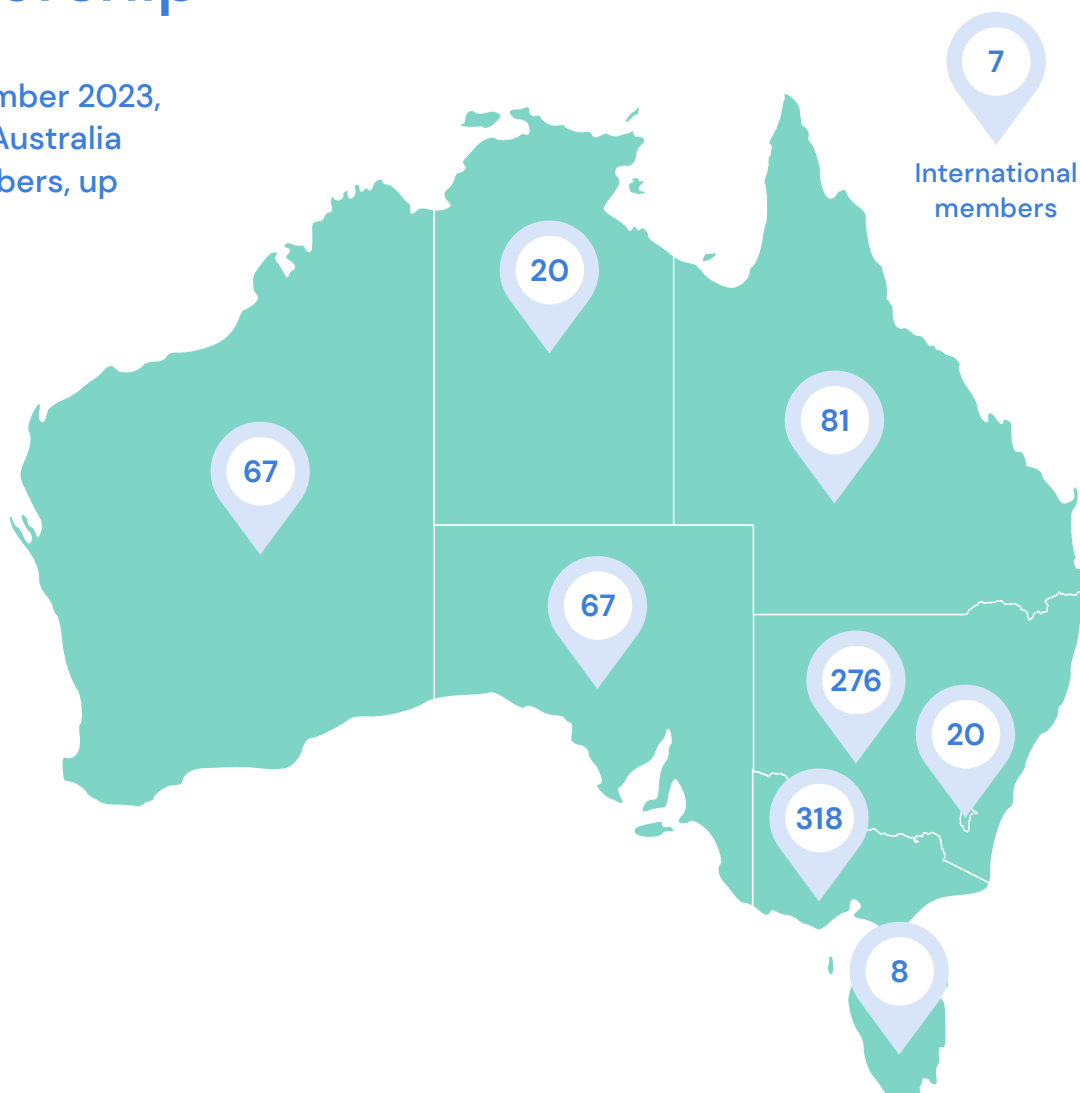
In August 2023, the Albanese Government announced that the Voice referendum would be held on 14 October about the proposal to establish an Aboriginal and Torres Strait Islander Voice to Parliament. History will show that the Constitutional amendment was rejected in both the state and national votes.

Right: The Hon Linda Burney MP, Minister for Indigenous Australians at the Voice panel event (see page 10).



Membership

As at 31 December 2023, Philanthropy Australia had 852 members, up on 2022's 818.



Financial summary 2023

	Restricted	Unrestricted	Total
Income	\$859,662	\$4,981,641	\$5,841,302
Expenditure	(\$1,037,360)	(\$4,671,560)	(\$5,708,919)
Total Surplus (Deficit)	(\$177,698)	\$310,081	\$132,383



Thank you to our 2023 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 2023.

Strategic partners

Strategic Funders support the implementation of [Philanthropy Australia's Strategic Plan 2022-2025](#).

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

Philanthropy champions

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

State champions

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

Patrons, Life members and Board 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

Board members

Amanda Miller OAM, Co–Chair
Lisa George, Co–Chair
Kirsty Allen
Ling Ang,
to 16 June 2023

Anthony Cavanagh,
to 13 June 2023
Jon Cheung,
to 24 May 2023
Alexandra Dimos,
appointed 24 May 2023
Liz Gillies
Michael Graf
Tabitha Lovett
John McLeod
Maree Sidey
Joseph Skrzynski AO,
to 18 May 2023
Kristen Stevenson,
appointed 24 May 2023
Stacey Thomas

Biographies of current
[Board members](#) and [staff](#)
can be read on our website.

Corporate information

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Fortitude Valley QLD 4006

Perth

Home office

