

# Giving Well





# Family legacy givers lead way with more

Following in the footsteps of Stan Perron, some key names in philanthropy have increased their funding distribution, but many charity recipients are struggling to measure the impact of these donations.

## Key takeaways

- Some of Perth's most affluent families have increased their donations
- Big charities are benefiting from increased government grants
- Philanthropists are becoming more focused with the causes they support (pages 26 and 28)

**LIFT:** Perth Children's Hospital Foundation has increased its donations, led by chief executive Carrick Robinson (right), and head of fundraising Heiko Plange.



**Delia Price**

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## 7-PAGE FEATURE

SOME of Perth's most prominent business people are establishing a family legacy among Western Australia's largest philanthropic foundations, which are ranked each year in the BNiQ database by funds distributed.

Leading the way is Andrew and Nicola Forrest's **Minderoo Foundation**, which increased its funding by a staggering \$38 million in the past financial year.

Minderoo reported giving \$56.5 million in the year to 2018, up from \$18.7 million in 2017.

The **Stan Perron Charitable Foundation** also sharply increased the amount of funds it

distributed last year, increasing from \$4.4 million in 2017 to \$12.8 million, and maintaining third rank.

The foundation has typically donated around \$5 million to some 150 charities each year.

The death of renowned philanthropist Stan Perron late last year has left the foundation in an even stronger financial position, with Perron Group announcing the "greater majority" of its future earnings and \$4 billion in net assets would benefit Mr Perron's foundation.

Taking the reins from her father, Elizabeth Perron now chairs the foundation, and will oversee what is expected to be an enormous increase in funds distributed.

While it has not achieved the same level of funding growth as Perron and Minderoo, the **McCusker Charitable Foundation** has jumped from eighth to fourth ranking, after increasing donations distributed from \$2.6 million to \$5 million.

The foundation was established by Malcolm and Tonya

McCusker to formalise years of giving by the family.

Venture capitalist and former mining executive Charlie Bass is also represented in the BNiQ top 10 through his **Bass Family Foundation**, which donated \$1 million to educational support for rural disadvantaged children in 2018.

However, a notable absence from the peak of the philanthropic foundations list is Australia's wealthiest woman, Gina Rinehart.

The **Rinehart Family Medical Foundation** did not distribute any funds in 2018, despite reporting nearly \$75 million in assets.

It gave \$2.6 million in 2017.

The foundation has not responded to a request for comment. Mrs Rinehart has in the past been tight-lipped about the extent of her giving.

She has privately donated to multiple charities, including Parkerville Children and Youth Care, and is a regular backer of swimming, volleyball, rowing and other sports.

Some of her giving has also been through her companies,

# \$38m

## MINDEROO FOUNDATION'S LIFT IN FUNDING

Hancock Prospecting and Roy Hill Holdings, so it is difficult to establish the philanthropic impact she may be having.

Beyond the realm of WA's most affluent families, many other foundations have lowered their funding in the past year.

The **St John of God Foundation**, **Bravery Trust**, **Bankwest Foundation**, and **Fremantle Foundation** all donated at least \$100,000 less in 2018 than the previous year.

The **Channel 7 Telethon Trust**, which retained second ranking, reported a drop of \$3 million in donations through its most recent 2017 financial statement.

The **Perth Children's Hospital Foundation**, which is the hospital's primary fundraising body, bucked the trend and increased

its donations to the new Perth Children's Hospital and wider children's health service by nearly \$1 million.

The foundation had \$25 million in funding commitments over the next five years, which would be covered by investment reserves and donor pledges, it reported.

## Charity boost

The BNiQ database shows that most of WA's large charities achieved an increase in revenue last financial year.

These include Activ Foundation, Ability Centre, Telethon Kids Institute, Autism Association of WA, MSWA, Nulsen Disability Services and Clontarf Foundation.

The above charities reported increases in government grants, with the most significant boost coming from state government, particularly the Department of Communities, as well as the National Disability Insurance Scheme.

Of the top 10 BNiQ charities, six provide disability services as





Photos: Gabriel Oliveira

**MOVING UP:** Rocky Bay, led by chief executive Michael Tait, reported a \$12.5 million revenue increase.

their core business and have leveraged these funding sources.

Disability services provider **Rocky Bay** jumped from fifth to third, as its revenue jumped to \$70 million from \$57.7 million.

This comes from the combination of a \$9 million increase in funding from the state government's Department of Communities, a \$2 million NDIS injection, as well as a continuing campaign to fund the redevelopment of its Mosman Park facility.

As of late last year, funding for the project stood at nearly \$10 million.

**MSWA** has also benefited from an additional \$3 million in government grants, but additionally reported a \$3 million increase in marketing and fundraising income.

One charity into the list for the first time this year is aged care service provider **Chorus**, following the successful merger of Community First, Care Options and Volunteer Task Force.

The organisations were relatively small players in the char-

ity landscape, but Chorus has now entered the list at rank 15.

It reported \$36.8 million in revenue last year, and \$27 million in total assets.

The second-ranking **Royal Flying Doctor Service** is one of two charities in the top 20 that experienced a revenue drop, losing \$5.8 million.

Despite increases in WA Health Department funding and project grants, the drop was primarily caused by a \$3 million decrease in federal funding, and a \$7.9 million decrease in capital grants.

The **Cancer Council WA** is another notable example that tumbled down the rankings after a \$7 million revenue decline to \$25 million.

The dip can be attributed to a decrease in revenue from fundraising and donations.

In 2018, the Cancer Council reported \$8.6 million revenue in this area, and from 2014 to 2016 this number remained stable at around \$10 million.

In 2017, however, this revenue peaked at \$17 million, meaning

“There is a significant opportunity for the community sector and governments to work closely together to measure the overall impact of programs

– Paul Flatau

the rankings drop may merely be a return to overall revenue that previously remained stable at around \$25 million to \$27 million.

### Accountability concerns

While the top-ranking charities on the BNiQ database are producing thorough financial records, recent research has found that understanding the impact of Australian charities is becoming increasingly difficult.

The 2019 Outcomes Measurement in the Australian Community Sector Report, led by the University of Western Australia's Centre for Social Impact, found accountability for chari-

ties was a key national challenge, following a drop in organisations measuring their impact.

Lead researcher Paul Flatau said the latest report showed that the proportion of organisations measuring their impact had dropped from 75 per cent to 70 per cent in the past year.

Conversely, for charities that did measure their outcomes, greater effort was being put in than in previous years.

Larger organisations with turnover greater than \$1 million were more likely to measure their outcomes than smaller organisations.

“A key finding is charities face significant constraints to re-

source outcomes measurement activities,” Professor Flatau said.

“Around 60 per cent spend less than 3 per cent on outcomes measurement, which is far lower than recommended levels.

“A primary cause lies in the lack of funding to measure outcomes effectively, with funds mainly sourced internally.”

More than 350 small, medium-sized and large charitable organisations across the country completed the annual survey.

The report found there was a gulf between the expectation put on charities to measure their outcomes, and the funding available to do so, despite positive sentiment about outcomes measurement among community organisations.

“There is a significant opportunity for the community sector and governments to work closely together to measure the overall impact of programs and to set targets on critical social outcomes such as poverty, unemployment and overall well-being,” Professor Flatau said.



# Harmanis has mindful plan to help

Philanthropist and former mining entrepreneur Kerry Harmanis has narrowed the focus of his donations in recent years, and now primarily funds his passion project, Mindful Meditation Australia.

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MOVING from mining to mindfulness has been a natural process for Kerry Harmanis.

The former founding director and executive chairman of Jubilee Mines has practised meditation throughout his career, crediting the daily craft for giving him the clarity to sell his company just days before a market crash.

After an early career in law and a rejection from art school, Mr Harmanis travelled to the US, Greece and Africa to search for minerals.

The venture was only partly successful, but Mr Harmanis speaks fondly of the period in his life, as he traced the ancient mines of Philip of Macedon and Alexander the Great.

On returning to Western Australia, he moved full time into mining, and in 1997 his company, Jubilee Mines, discovered a "bonanza nickel deposit".

Lacking professional management training, Mr Harmanis relied on his people skills to quickly build a successful team as the company began to boom.

In 2007, he realised change was coming.

"The market was feeling topky, I was turning 60, we needed a lot more capital," he said.

"I was meditating deeply, asking questions and really trying to listen for answers.

"The answer came very clearly – it's time to sell the company.



**PASSION:** Kerry Harmanis gives through the meditation organisation he founded.  
Photo: Gabriel Oliveira

"I woke up the next day, called in all the senior managers and said, 'right, are you with me?'"

Several weeks later, a \$3.1 billion sale deal was struck with Anglo-Swiss company Xstrata, netting Mr Harmanis an estimated \$500 million.

"We had a timetable – bids in on the Friday, negotiate with the highest bidder on the Saturday, write up the documents on the Sunday, and announce it on the Monday," he said.

"So we did that, the market was totally staggered, and it was a magnificent deal.

"We stuck to the timetable – on Thursday the market crashed and has never been back since."

The large profit that was left in Mr Harmanis' hands presented an array of opportunities, he said,

**"Meditation is not just another program, it's a basic elemental tool that people can use if they want to become more deeply happy and have their lives work better"**

– Kerry Harmanis

but philanthropy was the natural path.

"When we sold the company, I was left this huge pile of money – I was very grateful and figured I couldn't spend it all on myself," he said.

"When you're seen to have money, people come at you and ask you for money, that's part of the gig.

"I gave a lot, and happily, not always to tax-free situations ... that was never a driver for me."

Mr Harmanis has not been immune to economic challenges, and has consequently become more focused in his giving.

"Even people with money have tough years, and last year was a tough year for me financially," he said.

"It was a tough year for a lot of people because the mining boom's gone, property's down, the stock market's down."

Mr Harmanis now gives selectively to several children's charities, and primarily funds his not-for-profit organisation Mindful Meditation Australia (MMA), which provides meditation courses within schools.

With a board including Neale Fong, Trent Falkner and Karen Gadsby, it reported \$3.7 million in assets last year.

"I decided I wanted to give back to the world, the most authentic and lasting way to help people was to change them from the inside – not another organisation that just does things externally," Mr Harmanis said.

"Meditation is not just another program, it's a basic elemental tool that people can use if they want to become more deeply happy and have their lives work better.

"We've got better tools now, better technology, but we haven't really improved as human beings."

The organisation was set up with the goal of helping children, inspired by advice given to him by the Dalai Lama, Mr Harmanis said.

MMA has worked with more than 2,000 teachers and 10,500 students in the state.

It is entirely funded from the pocket of Mr Harmanis.

"I'm very happy with what we have accomplished at MMA, but I want it to go quicker now, and that involves probably some help from other people, organisations, government and schools," he said.

"We've talked about going to the east coast, we've talked about going to prisons to help serial offenders, at-risk youth, ante-natal mothers – people that will truly benefit.

"Financially, I give it what it needs – we manage the money well, but we basically pay for the programs."

**BNiQ SEARCH** Kerry Harmanis

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# Personal stories underpin long-term support

Three prominent Perth businessmen are proving the importance of individual connection to motivate sustained financial backing.

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A TIGHT-KNIT trio of businessmen are calling for a new wave of philanthropists to support Perth's research community.

George Jones, John Schaffer and Jim Litis are major supporters of the Ear Science Institute Australia, which addresses ear health through research, treatment and training.

The group's legacy is set to provide better hearing for numerous Western Australians, but the donors' lives have also been hugely improved by the connection.

Ear Science was founded by Professor Marcus Atlas in 2001.

Former Sundance Resources chairman George Jones was the biggest single donor to the \$20 million Ear Science building, which officially opened in Subiaco in 2011.

Mr Jones \$3 million for the state of the art building.

His involvement came after Professor Atlas diagnosed him with Meniere's disease following years of misdiagnosis by other specialists.

Professor Atlas went on to perform complex surgery, involving



**LISTENING:** George Jones (left), with Jim Litis, Ear Science chief executive Sandra Bellekom, Marcus Atlas, and John Schaffer. **Photo:** Karin Calvert

lifting Mr Jones' brain at the base, putting an end to years of black-outs and dizzy spells.

Mr Jones said Ear Science's success lay in its profits-based business model.

Ear Science chairman John Schaffer said he had been impressed by Professor Atlas' vision for this model, using profits to sustain research.

"The model enables the institute to operate without total reliance on government funding, as is too often the case," he said.

Mr Schaffer chairs building materials group Schaffer Corporation.

Alongside wife Debbie, he led the fundraising for the Subiaco building.

Mr Schaffer has known Professor Atlas from when they were boys, but became involved in

fundraising through long-term friend Mr Litis.

Mr Litis said he became acquainted with Professor Atlas about 15 years ago after the surgeon successfully operated on his son's ear, and said this connection was one reason he chose to support Ear Science.

"Marcus and I would often chat at the footy about his dream of creating a world-class facility," he said.

"I've recognised people I've met in my life's journey as people who can make a difference – when I meet them I know they can make a significant difference.

"Marcus is one of those people.

"He could've been on the world stage somewhere else but he chose to stay here and advance what's happening here above his own personal betterment."

**“What they gave is their time, intelligence and experience – that is the biggest donation they’ve ever given us – Marcus Atlas**

A founding director of property investment group Primewest, Mr Litis spent 12 months in negotiations for the lease on a piece of the company's land to house the facility.

Professor Atlas said the trio had not only donated generous amounts of money, but also their time and knowledge.

Ear Science had grown from three staff in 2001 to more than 100 people, he said, but the scale

of growth and its success would not have been achievable without Mr Jones, Mr Schaffer and Mr Litis.

The organisation is ranked 44 on the BNiQ charities list, with \$8.2 million revenue.

"If we really want to come down to it, what they gave is their time, intelligence and experience – that is the biggest donation they've ever given us," Professor Atlas said.

## Working together to shape strong futures.

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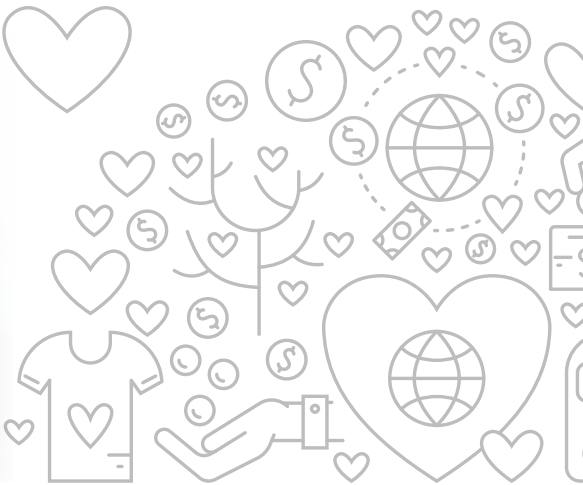
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**WA's LARGEST PHILANTHROPIC FOUNDATIONS**  
RANKED BY FUNDS DISTRIBUTED MOST RECENT FINANCIAL YEAR



Professor Ruth Ganss, Perkins Institute. Photo: Gabriel Oliveira



Rank	Change from previous year	Company	Senior WA executive and title	Year est. in WA	Balance date	Funds distributed most recent fin. year (\$m)	Funds distributed previous fin. year (\$m)	WA Revenue most recent fin. year (\$m)	WA Revenue previous fin. year (\$m)	Total Assets (\$m)	Donations received most recent fin. year (\$m)	Donations received previous fin. year (\$m)
1	↑	Minderoo Foundation	Mr Andrew Hagger Chief executive	2013	30-Jun-18	60.4	18.7	418.7	206.6	639.8	402.4	200.4
2	↓	Channel 7 Telethon Trust	Ms Marie-Anne Keeffe General manager	1968	31-Dec-17	24.5	27.3	38.7	28.6	40.8	27.7	20.7
3	—	Stan Perron Charitable Foundation	Ms Elizabeth Perron Executive chair	1978	30-Jun-18	12.8	4.4	14.4	6.4	19.2	12.8	4.4
4	↑	McCusker Charitable Foundation	Mr Malcolm McCusker Chairman	2017	30-Jun-18	5.0	2.6	2.9	100.1	98.0	0.0	100.1
5	↓	Perth Children's Hospital Foundation	Mr Carrick Robinson Chief executive	1998	30-Jun-18	4.9	4.0	9.7	8.0	39.3	5.9	4.3
6	↑	Kimberley Foundation Australia	Ms Deidre Willmott Non-executive director	1997	30-Jun-18	2.4	0.3	2.6	1.1	5.3	2.5	0.7
7	↓	Royal Perth Hospital Medical Research Foundation	Ms Jocelyn Young Chief executive	1983	30-Jun-18	2.4	3.0	7.3	6.7	75.9	1.9	0.9
8	↑	Cancer Research Trust	Ms Eleonore Fuchter Executive officer	2009	30-Jun-18	1.7	0.4	4.0	3.1	38.5	0.0	0.0
9	↑	Riverview Trust	Ms Alex McKellar Manager, community services	2004	31-Dec-17	1.1	1.3	1.7	1.4	0.6	1.7	1.4
10	↑	Bass Family Foundation	Mr Charlie Bass Founder	2006	30-Jun-18	1.0	1.0	2.7	1.8	22.3	0.0	0.0

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\*Estimate, WND: Would Not Disclose, NFP: Not For Publication, N/A: Not Applicable or Not Available.



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# WA's LARGEST CHARITABLE ORGANISATIONS.

RANKED BY WA REVENUE MOST RECENT FINANCIAL YEAR AND THEN BY TOTAL STAFF IN WA.



**Royal Flying Doctor Service.** Photo: Julia Rau Photography

Rank	Change from previous year	Company name	Senior executive and title	Year est. in WA	Total staff in WA	Board Members	WA Revenue (\$m) a) most recent fin. year b) previous fin. year	Balance date
1	—	<b>Activ Foundation</b>	Ms Danielle Newport Chief executive	1951	2,172	Neil Guard (Chair), Craig Knox Lyttle, Andrew Leroy, Dale Calhoun, Matt Wisniewski, Lisa Palmer, Bevan Smith, Danielle Newport	a) 104.0 b) 100.1	30-Jun-18
2	—	<b>Royal Flying Doctor Service</b>	Ms Rebecca Tomkinson Chief executive	1935	289	Sam Walsh (Chair), Saul Harben, John Walker, Ann Ward, Robyn Sermon, Fiona Wood, Angus Turner, Robert Slocombe	a) 88.8 b) 94.6	30-Jun-18
3	↑	<b>Rocky Bay</b>	Mr Michael Tait Chief executive	1938	890	Susan Male (Chair), Chris Catlow, Paul Klein, Carolyn Hall, Miriam Borthwick, Veronica Parish, Jeff Holloway, Garry Johnson, Chris Ryan, Martin Wandmaker.	a) 70.2 b) 57.7	30-Jun-18
4	↓	<b>Ability Centre</b>	Mrs Jacquie Thomson Chief executive	1951	952	Justin Scanlan (Chair), Daniel Butler, Robert Radley, Melissa Northcott, Ken Nylander, Roslyn Elmes, Gary McGrath, Priya Cooper, Mino Intini, Russell Hardwick, Tony Adcock	a) 69.0 b) 64.7	30-Jun-18
5	↓	<b>Telethon Kids Institute</b>	Mr Jonathan Carapetis Director	1990	489	John Langoulant (Chair), Jonathan Carapetis, Nicole O'Connor, Fiona Drummond, Alex Brown, Jeff Dowling, Michael McAnearney, Rohan Williams, Jozef Gecz, Jane Muirsmith	a) 61.6 b) 60.6	31-Dec-17
6	—	<b>Autism Association of WA</b>	Ms Joan McKenna Kerr Chief executive	1967	735	Rob Storer (Chair), Mark Altus, Bobby Brownhill, Louis I Landau, Vicki Rank, Duncan Monro, Geoff Kidd	a) 58.5 b) 53.7	30-Jun-18
7	—	<b>MSWA</b>	Mr Marcus Stafford Chief executive	1973	755	George Pampacos (President), Greg Brindle, Bill Hassell, Horst Benmmerl, Ros Harman, Bill Carroll, Jason Jordan, Greg Brotherson, David Jones, Liam Roche, Michael Fay, Glennys Marsdon	a) 57.9 b) 52.9	30-Jun-18
8	—	<b>Nulsen Disability Services</b>	Mr Gordon Trewern Chief executive	1954	707	David Gilchrist (Chair), Kent Burwash, Evelyn Hogg, Adam Smith, Debra Letica, Troy MacMillan, Simon te Brinke, Penny Knight, Julieanne Allan, Rebecca Crellin	a) 50.1 b) 48.3	30-Jun-18
9	—	<b>Clontarf Foundation</b>	Mr Gerard Neesham Chief executive	2000	359	Ross Kelly (Chair), Gerard Neesham, Tom O'Leary, Ennio Tavani, John Gillam, Brian Tyson, Danny Ford, Marilyn Morgan, David Neesham, Harry Neesham.	a) 47.4 b) 41.2	31-Dec-18
10	↑	<b>Rise Network</b>	Ms Justine Colyer Chief executive	1983	634	Alf Lay (Chair), John Sobolewski, Chris Nicoloff, Tony Borger, Karen O'Neill, Jesper Sentow, Jill Jamieson, Charlie Gunningham, Robyn Sutherland	a) 46.1 b) 36.9	30-Jun-18
11	—	<b>Anglicare WA</b>	Mr Mark Glasson Chief executive	1976	625	John Atkins (Chair), Simon Axworthy, Erica Haddon, Andrew Friars, Michelle Scott, John O'Connor, Sue Robertson, Julie Baker	a) 44.4 b) 39.8	30-Jun-18
12	—	<b>My Place</b>	Mr Darren Ginnelly Managing director	1999	289	Greg Lewis (Chairman), Darren Ginnelly, Tony Ryan, Phil Deschamp, Peter Dunn, Jane Anne McLarty	a) 43.7 b) 39.9	30-Jun-18
13	↓	<b>Salvation Army</b>	Ms Chris Reid Divisional commander, WA division	1891	718		a) 41.0 b) 40.5	30-Jun-17
14	↓	<b>UnitingCare West</b>	Ms Amanda Hunt Chief executive	2006	377	Peter Fitzpatrick (Chair), Lisa Fini, Chris Hunt, Deborah Marshall, Mark Webb, Ron Chalmers, Alison McCubbin, Hannah McGlade	a) 36.9 b) 34.4	30-Jun-18
15	↑	<b>Chorus</b>	Mr Dan Minchin Chief executive	2017	486	Moir Watson (Chair), Ray Glickman, Craig Adam, Ian Brunette, Tony Cull, Barbara Powell, Geoff Brayshaw, Stuart Flynn	a) 36.8 b) 29.8	30-Jun-18
16	↓	<b>Identitywa</b>	Ms Marina Re Chief executive	1977	548	Graeme Mander (Chair), Linda Walsh, Terry Wilson, Phil Scott, Nathan Ebbs, Levy Mpofu, Jenny Drury, Tony Curry	a) 34.9 b) 32.7	30-Jun-18
17	↓	<b>Communicare</b>	Ms Melissa Perry Chief executive	1977	301	Jim McGinty (Chair) Shelena Serrano, Rod Van, Tania Jeyamohan, Patrick Dumbell, Glauca Hyland, Brendan Hodge	a) 30.8 b) 30.2	30-Jun-18
18	↓	<b>Harry Perkins Institute of Medical Research</b>	Mr Peter Leedman Director	1998	73	Wayne Martin (Chair), Stephen Davis, Peter Leedman, Jan Stewart, Roger Port, Dawn Freshwater, Steve Wesselingh, Simon Biggs, Laurence Iffla	a) 28.8 b) 26.1	31-Dec-17





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