

ENDOWMENT FOR EXCELLENCE ANNUAL REPORT 2009

We have taken considerable effort to ensure the accuracy of this report. If there are any errors or omissions, please notify us at the Office of Endowment for Excellence.

For more information about supporting The Australian National University and its activities please contact us.

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Iona Walsh Art+Design



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Professor Ian Chubb AC, Vice-Chancellor
(photo by Stuart Hay).



Professor the Hon Gareth Evans AO QC,
Chancellor (photo by Stuart Hay).

We would like to thank all those individuals and enterprises who have donated to the Endowment, particularly those who supported us in 2009 – another financially difficult year worldwide.

OUR THANKS

In 1946, The Australian National University (ANU) was established as a national university for the benefit of all Australians. In 2009, the then Prime Minister Kevin Rudd re-affirmed the University's national role, referring to ANU as a "strategic endowment for the nation". Our national role was further strengthened by two significant new initiatives during the year:

- the establishment of the new National Security College at ANU in collaboration with the Federal Government, which will provide world-class national security training and expertise to the Australian community

and

- the implementation of the ANU Regional Partnerships Program. This program will improve the educational opportunities and aspirations of young Australians in rural and regional areas by establishing dedicated ANU student ambassadors in regional hubs. In 2009 the program began in several areas of NSW and we hope to expand it to a wider range of regional communities across the nation in the years ahead.

Also in 2009, ANU launched a campus-wide Reconciliation Action Plan, one of the first universities in Australia to do so. The Endowment for Excellence will play a key role in implementing the Reconciliation Action Plan by raising funds from our community for a \$25 million endowment, which will:

- provide undergraduate and postgraduate scholarships for talented Indigenous students to study at ANU
- support early career Indigenous academics with a postdoctoral employment program

- implement an Indigenous Visiting Fellow program across all disciplines in the University
- provide mentoring and work experience opportunities to assist and encourage Indigenous students to complete their studies

and

- build on major research projects into Indigenous issues, in areas such as Rock Art, Endangered Languages, Economic Policy, Ecology, Visual Art, Medicine and Law.

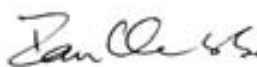
This is just one area in which the Endowment is supporting ANU in its role as a university for our nation. Funds from the Endowment also provide invaluable support for hundreds of scholarships and prizes, community outreach programs and nationally and internationally significant research projects.

We would like to thank all those individuals and enterprises who have donated to the Endowment, particularly those who supported us in 2009 – another financially difficult year worldwide.

Donations invested in the Endowment ensure that ANU is able to carry out its mission to be a truly national university of which all Australians can be proud and with which all Australians have the opportunity to engage.



Professor the Hon Gareth Evans AO QC
Chancellor



Professor Ian Chubb AC
Vice-Chancellor and President



Wildflowers on ANU campus.

ANU ENDOWMENT FOR EXCELLENCE BOARD OF GOVERNORS 2009 BOARD MEMBERS

Tony Hartnell AM (President from February 2009)

BEd LLB(Hons) ANU, LLM *George Washington*
Partner, Atanaskovic Hartnell

Ian Grigg AM (President from 1999 to February 2009)

BA ANU, HonDUniv ANU
Senior Advisor, Toyota Australia Board of Directors

Colin Neave AM

LLB ANU/Melb
Chief Ombudsman, Financial Ombudsman Service

Robyn Watts

BA ANU, MA *Reading*, Grad Dip Business Management *Canberra*
Various Board Directorship roles

David Chessell

BA(Hons) *Melb*, MEd ANU, PhD *Yale*
Director, Access Capital Advisers

Ex-officio Board Members

Professor Ian Chubb AC

MSc DPhil *Oxon*, HonDSc *Flinders*
Vice-Chancellor and President, ANU

The Hon Kim Beazley AC

BA(Hons) *UWA*, MA *UWA*, MPhil *Oxon*
Chancellor, ANU

The Hon Justice Annabelle Bennett AO

BSc(Hons) PhD *Syd*, LLB *UNSW*
Pro Chancellor, ANU

Professor Mandy Thomas

BA(Hons), PhD ANU
Pro Vice-Chancellor, ANU

Joan Uhr

Director, ANU Endowment for Excellence

Michael Carmody (until July 2009)

President, Postgraduate and Research Students' Association, ANU

Tegan Kelly (from September 2009)

President, Postgraduate and Research Students' Association, ANU

REPORT FROM THE PRESIDENT



Tony Hartnell AM (photo by Stuart Hay).

I am pleased to report that 2009 was another highly successful year for the ANU Endowment for Excellence. Despite the world still reeling from the global financial crisis, supporters of ANU contributed generously to the Endowment to the tune of nearly \$7 million.

Last year, I was struck once again by the way people who give have a real impact on the life of the University. I'd like to share with you a couple of stories which, for me, highlight the different ways that organisations and individuals support the Endowment and how the Endowment in turn enriches the scholarly and community life of ANU.

Ethel Tory worked at ANU for 18 years in the 1960s and 1970s as a Lecturer, Senior Lecturer, and Acting Head of Department in French. She was passionate about drama and languages and enjoyed mentoring and encouraging students in these areas. When she passed away she left a substantial bequest to the University expressing the wish that it be used to support drama studies and language scholarships. In 2009 her bequest had grown to the extent that the Endowment was able to honour her last wish and use a portion of her bequest to support nearly 50 students to travel overseas for intensive language studies. From 2010 these scholarships will be offered biannually at ANU, allowing Ethel's passion for learning a foreign language to be passed on to future generations.

In the middle of last year the Endowment heard of a 'mystery' bequest to the University – a man in Victoria had left all of his estate to ANU for the benefit of maths and science students. Further information revealed

that John Deakin, who graduated from ANU with a Bachelor of Science degree in the 1960s, wanted to give back to the University "in recognition of its assistance to me in allowing me to graduate from there". Deakin's substantial legacy (currently valued at around \$2 million) will provide for a number of perpetual scholarships in his areas of academic passion – chemistry and mathematics.

In February 2009 the Vice-Chancellor signed an agreement with local energy and water companies ACTEW and ActewAGL to provide a \$2 million endowment supporting renewable energy and water sustainability research at ANU. In 2010, this endowment will provide funding for a PhD scholar working in the area, as well as a water catchment research project within the Fenner School of Environment and Society.

These are just three of the many ways that the Endowment was supported in 2009, and some of the different ways in which the Endowment supported and rewarded student endeavour, allowed researchers to pursue their chosen field and contributed to ANU participating in debates and conversations in the national interest. Throughout the year I've enjoyed hearing about the ways in which donors to the Endowment have made a difference to the lives of students and researchers. I invite you to read more stories from the Endowment throughout this report.

The year 2009 also saw a significant change in the strategic direction of the Endowment with the Board of Governors and ANU Council endorsing the new 'Strategic Framework for ANU Advancement'. This new framework will see ANU take a leading role

nationally as a university with significant philanthropic support for its education and research programs.

During the year my fellow Board members and I were delighted to work with Professor the Honourable Kim Beazley as ANU Chancellor. He was very engaged in the work of the Endowment and we will miss his drive and positive input. We wish him well in his new appointment and we look forward to welcoming Professor the Honourable Gareth Evans AO QC as the new Chancellor of the University, and member of the Board of Governors.

On behalf of the Board of Governors of the ANU Endowment for Excellence I would like to sincerely thank you for your support in 2009 and assure you that, as you can see from the body of this report, your contribution is being maximised to make a difference now and for the future.



Tony Hartnell AM
President, Board of Governors

THE CLASSICS RE-IGNITED

Remnants of the classical world filter through our lives in often strange and profound ways. The classical world, whilst in so many ways is an unrecognisable and alien landscape, retains much that is surprisingly familiar and modern. Thucydides' account of Pericles' Funeral Oration, positioned at the beginning of the devastating Peloponnesian War, which will bring Athens to its knees, resonates strongly with enduring themes of humanity – of love and loss, of family, of home, of morality, of honour and of ideals worth fighting for. This finely crafted work has often been replicated in modern times as the key themes and rhetorical devices continue to resonate with people in times of loss or triumph. Abraham Lincoln's Gettysburg Address or indeed Paul Keating's speech at the tomb of the unknown soldier echo the rhetoric employed by Thucydides 2,500 years earlier.

In recognition of the ongoing salience and importance of classical study ANU has reinvigorated the Classics Endowment Fund. The Endowment seeks to strengthen classics at ANU by focusing on a number of different aspects in support of the new Bachelor of Classics degree. The first phase is to develop new scholarship and travel grants to encourage and support students who wish to study classics. This will allow students to travel to see parts of the ancient world encouraging a richer learning experience. Currently trips to Turkey are planned for 2010 with a further trip to Greece planned for 2011. The second phase of the Endowment is to bolster classics teaching numbers within the Classics Program to ensure that ANU can continue to broaden and enrich the range of courses offered to students.

The much lauded Australian writer David Malouf AO helped to launch the Bachelor of Classics and the Classics Endowment Fund, emphasising the keen relevance that classical literature and society has for contemporary students in an address at ANU on 11 September 2009.

Malouf spoke vividly of his childhood interactions with the classical world and language in his native Queensland.

"Through our Queensland Readers we got just a teasing glimpse of what might be. The stories of Persephone, and Echo and Narcissus, and Clytie who became a sunflower, and Hyacinthus; the story of Croesus, as told by Tolsioy; of Epimetheus and Pandora; of Midas, of Atlanta, of Damon and Pythias, of Horatius at the bridge of the slave and the lion, and various fables of Aesop, and the stories of the months and how they got their names."

This love of the classic world for Malouf has clear modern applications for Australia and the way it thinks about itself and its place in the world.

"As for us here in what is no longer, as I called it earlier, an odd out-of-the-way corner of the world we too might see ourselves reflected in the Roman mirror, being involved as we are with the American imperium and part of a world that at least for those of us in the first world, is global; being involved too with the same questions of how to hold together a multi-ethnic and multi-cultural society, and with global, if not quite imperial obligations; and involved, as we have been for nearly half a century now, in small but almost continuous wars."

Malouf, in his own writing, has often located his fiction within the realms of the classical world, from his early poetry in the late sixties to his most recent novel *Ransom*. "Just this year I have published a novel *Ransom* about Priam, Achilles and the meeting between them that makes up the last book of the *Iliad*.

"It has always seemed astonishing to me that the *Iliad* standing as it does at the very beginning, 27 centuries ago, of our literary culture, should remain after all that time perhaps the greatest single work our culture has produced. Readers at every point since then have found something in it that speaks powerfully to their human concerns and anxieties, and directly to their feelings.

"...Most extraordinary of all, is the largeness of spirit, the all encompassing sympathy, with which Homer treats both sides in this conflict: the same respect for both the same horror and pity: 'The Sun had already lit the fields with its first beams when the Trojan and Achaean parties met. Even so, they found it difficult to recognise their dead before they had washed away the clotted blood with water. Then, as they lifted them into the wagons the hot tears flowed. King Priam had forbidden his men to cry aloud. So they heaped the corpses on the pyre in silent grief, and when they had consumed them in the flames they went back to holy Ilium!'"

This recognition of the richness and depth of the literature of the classical world and its continuing resonance for the way humanity thinks about itself is reflected in the renewed support that ANU has placed in classical education and the growing success of the

Classics Endowment in providing scholars new opportunities to make contributions in this field.

For the recording of David Malouf's address see www.anu.edu.au/discoveranu/content/podcasts/the_classics_today/



David Malouf AO at the launch of the Bachelor of Classics and the Classics Endowment Fund (photo by Stuart Hay).

2009 FINANCIAL REPORT AT A GLANCE

The year 2009 saw the world dealing with the effects of the global financial crisis. Friends and supporters of ANU have donated more than \$7 million to the ANU Endowment for Excellence, but in line with the global crisis this was slightly lower than in previous years. For detailed financial reports, refer to page 34.

The Endowment for Excellence has four broad categories within which funds are maintained and which receive the majority of external donations that directly benefit the University. The University adds to the Endowment with substantial amounts of University funds. The Endowment for Excellence had a total value of \$252.47 million at 31 December 2009, and comprised the following categories:

Renewal Funds **\$74.85 million**

The ANU Excellence and Renewal Program supports the highest standards of scholarship and teaching, including named professorial chairs, seminars, art and equipment acquisition, and the recruitment and retention of outstanding staff and research programs.

Scholarships and Prizes **\$34.98 million**

Scholarships and prizes are funded at both the undergraduate and graduate levels and enable the University to continue to attract and support bright and gifted students regardless of their economic background.

Named Foundations **\$7.30 million**

Named foundations operate under a charter approved by ANU Council and support defined disciplines or activities.

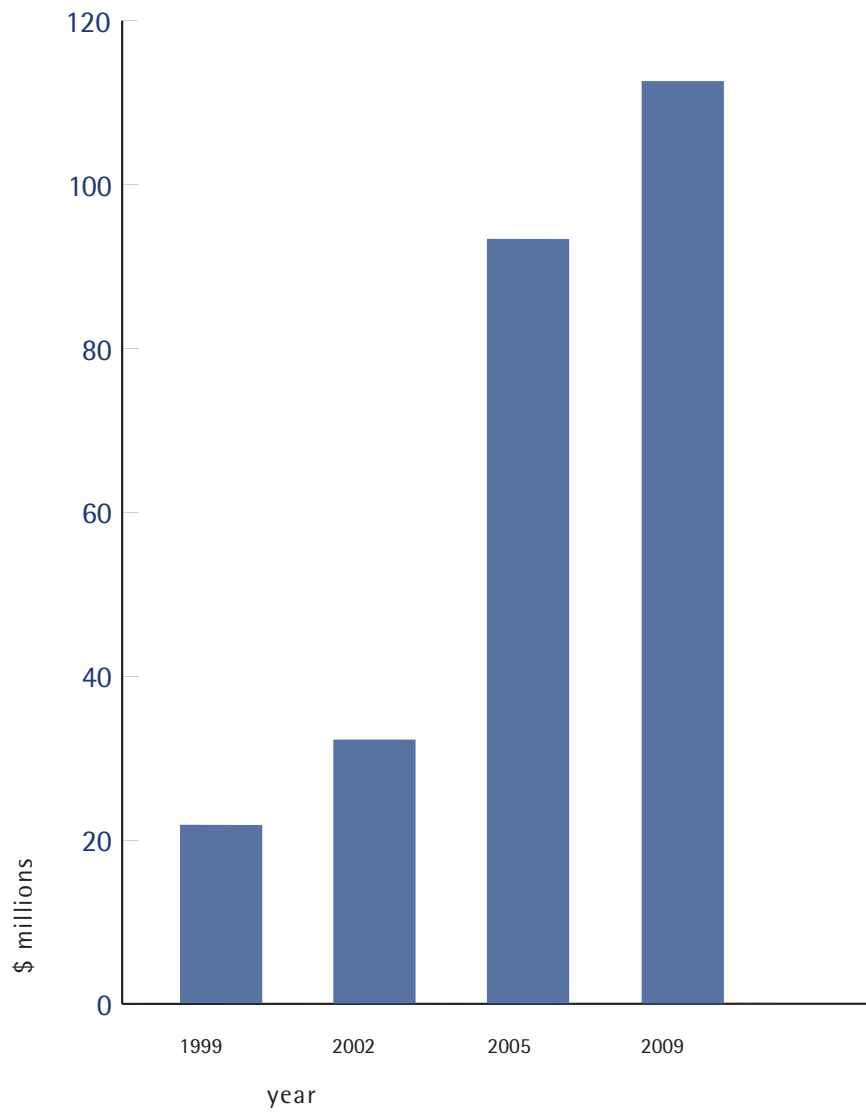
Inter-Institutional Arrangements **\$9.85 million**

Inter-institutional relationships provide for activities of mutual benefit with other institutions and reflect the ANU national education role.

University Funds **\$125.49 million**

The Vice-Chancellor maintains a series of funds which have been established in the Endowment for broad university priorities.

ENDOWMENT FOR EXCELLENCE DONOR FUNDS 1999–2009



INVESTMENT SUMMARY REPORT

Endowment funds are primarily invested in the ANU Long Term Investment Pool (LTIP), with amounts required for short term purposes held in cash or cash equivalents.

The LTIP distribution rate for 2009 was five per cent. The difference between the distribution rate and the actual returns generated by the LTIP was captured in the market price of units in the LTIP.

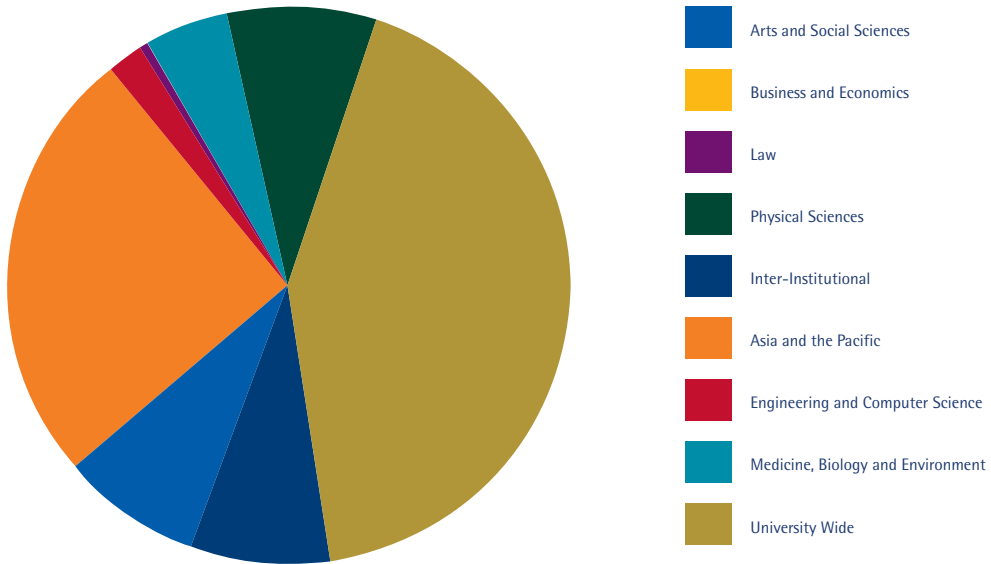
The investment return for the LTIP in 2009 was 19 per cent net of the management expense ratio (MER) of 0.2 per cent. This investment return ranked the University in the first quartile of managers in the SuperRatings Survey over one year.

For the endowment funds the University charges no ongoing administration fees, thus allowing full use of the donations for the purposes of supporting research and education. For bequests to the University a small one-off establishment fee is incurred to cover administration for bequests over \$100,000.

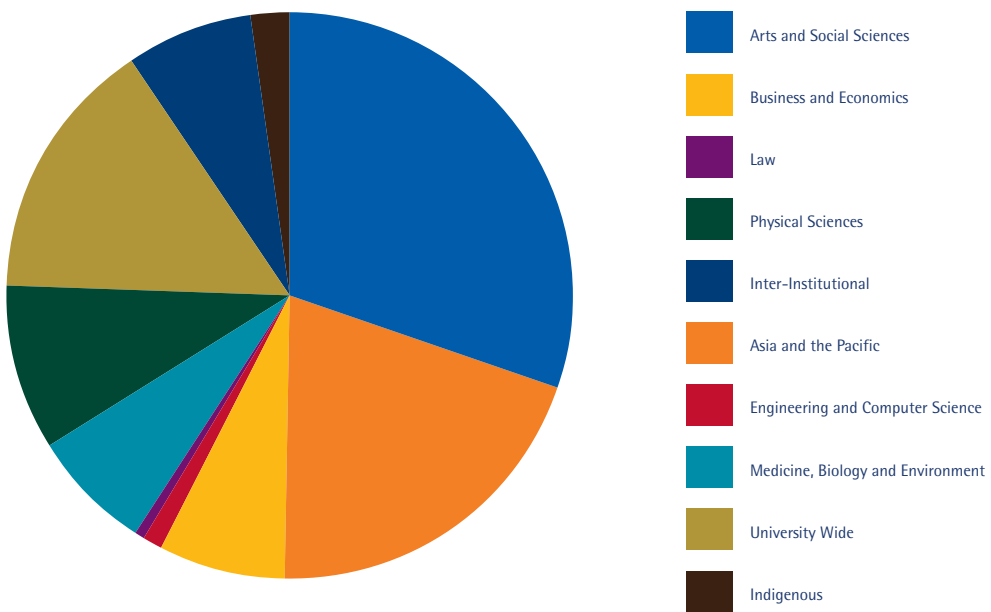
DISTRIBUTION OF 2009 DONATIONS

All of the seven ANU Colleges received support from external donations in 2009.

DONATIONS ACROSS THE UNIVERSITY IN 2009



TOTAL ENDOWED FUNDS ACROSS THE UNIVERSITY AT 31 DECEMBER 2009



ANU FOUNDATIONS HIGHLIGHTS FROM 2009

Named foundations within the Endowment for Excellence have been established to offer continuing support for study and research. These can be in the form of scholarships and prizes, conferences, seminars and/or lectures. Each foundation has a charter approved by ANU Council and supports specific disciplines or activities of the University. Below are some highlights from each foundation, representative of their many activities during the year.

The Freilich Foundation held two major public lectures, an eminent lecture series, and their biennial Summer School. The annual Alice Tay Lecture on Law and Human Rights was delivered by Mary Kostakidis on 'The Protection of Human Rights in Australia – A Way Forward' and the 'Annual Lecture in Bigotry and Tolerance' was presented by Professor Steven T. Katz on 'Antisemitism: Medieval and Modern'. Their popular summer school was attended by school teachers from across Australia who came to learn and discuss topics related to 'Religion and Bigotry'. The summer school also included a public lecture by Bishop Tom Frame on 'The New Crusade? Militant Secularism, Strident Atheism and Social Harmony in Australia'. In November the Foundation held an eminent lecture series on 'Women and War' with Professor Hilary Charlesworth, Professor J. Ann Tickner, Dr Bina D'Costa, and Penelope Andrews all delivering thought-provoking talks. The year also saw the Foundation appoint Penelope Mathew as the inaugural Freilich Foundation Chair.

The Visual Arts Foundation awarded the second annual Visual Arts Foundation undergraduate scholarship to Alexandra Ashurst, a first year digital media student at the ANU School of Art. In November, the

Foundation supported the Drill Hall Gallery's exhibition of the University's Indigenous Art Collection, accompanied by a beautifully illustrated and informative companion publication. The Foundation Chair, Professor David Williams, also led the development and publication of *The ANU School of Art: A History of the First 65 Years* by Michael Agostino.

The Sir Roland Wilson Foundation

continued its work in supporting public and economic policy at the University by awarding scholarships and travel grants to students in the area. Due to the death of Lady Joyce Wilson, Sir Roland's widow, in August the annual Sir Roland Wilson lecture was not held in 2009. However, Lady Wilson's generous bequest to ANU will ensure that the Foundation, its outreach work, and the students it supports, will continue in perpetuity.

The School of Music Foundation

supported Larry Sitsky's 75th birthday celebrations held at the Australian Music Centre, National Library of Australia. Larry Sitsky was a founding member of the Canberra School of Music, later the ANU School of Music and the Foundation was pleased to honour his long association and the active role he still plays within the School. Organ music studies received a further boost in 2009 with a bequest of over \$100k being given to the organ fund within the Foundation. This, coupled with donations received in previous years to install a new organ in Llewellyn Hall, mean that organ recitals can now be enjoyed by the Canberra community. During 2009, the Foundation also developed a new strategic fundraising plan which will be implemented from 2010 onwards, enabling them to support the work of the School.

The Australian Foundation for Mental Health Research funded two travel scholarships for PhD students to attend international conferences and present research from the ANU Centre for Mental Health Research. They also conducted a number of awareness and fundraising activities including a National Press Club Business Lunch with guest speaker and AFFIRM Ambassador Professor Ian Hickie. During Mental Health Week they launched the new mental health website www.beacon.anu.edu.au at Parliament House, as well as running an awareness raising advertising campaign and raising money at a number of mental health week events. Foundation board members raised awareness of mental health issues at the highest level when they hosted a visit to ANU by Therese Rein and visited Admiralty House to meet with the Governor-General.



Donors came together with foundation members to celebrate the achievements of ANU and the Endowment for Excellence (photo by Stuart Hay).

IN MEMORIAM

A number of new endowments were created or first awarded in 2009 in memory of great supporters and friends of ANU.

Professor Rod Rickards was one of the founding members of the Research School of Chemistry at ANU. Following his unexpected passing in late 2007 a PhD Scholarship in Organic and Biological Chemistry was established in his memory in 2009.

Following the passing of **Professor Chris Heyde** in 2008, a Scholarship in Probability and Statistics was established in his memory. Professor Heyde contributed significantly to his profession, working in the USA and the UK in addition to his long-standing relationship with ANU.

A new endowment was created in memory of **Dr Andréé Rosenfeld** and her significant contribution to the study of rock art. Dr Rosenfeld was a scientist and archaeologist whose contribution allowed ANU to develop rock art studies as a subdiscipline within the study of archaeology.

Dr Tom Rhymes was a key leader at ANU in technical services. Following his untimely passing in 2000 a Technical Development Award was created in his memory. This award is designed to assist outstanding technical staff members of the Research School of Physics and Engineering in their career development.



University Avenue on ANU campus.

BEQUESTS

Leaving a bequest to the University is a very powerful gift for the future. The generosity of many donors who thought of this type of gift in the past, certainly are making a difference to our activities now. Previous bequests to the University are now providing perpetual support to students and researchers in economics, drama, linguistics, archaeology, music and environmental science, as well as Indigenous students in any discipline.

Many of our donors have chosen to make a 'Living Bequest' which enables them to begin contributing during their lifetime and see the value that their gifts bring to the University and its scholars.

The formal bequest program at ANU, Your Bequest: Enduring Support Beyond Your Lifetime, has been running since early 2007. We are very proud to announce that in 2009 the program won the Fundraising Institute of Australia National Excellence Award for Bequest Fundraising.

In 2009 the University received 11 notifications of new bequests and started to receive the first disbursements from major bequests which had already been realised. Bequest funds received in 2009 will be used to:

- provide research scholarships in mathematics and pure sciences
- support the Sir Roland Wilson Foundation and its activities including scholarships for public policy research
- support the School of Music Foundation and its activities
- support the ANU College of Engineering and Computer Science
- support research into the causes and cures of Crohn's disease.

We thank all of our generous patrons who have committed to this program which will ensure that the students and academics of the future will be well supported in their studies and research.



ANU School of Music student plays the harp for guests at the Annual Donor Reception at University House (photo by Stuart Hay).

IN MEMORY OF PETER KARMEL



Professor Peter Karmel (1922-2008)
(photo by Bob Cooper).

*We ought to be thinking
of education as a part
of life – as really
life itself – instead of
as a preparation for life.*

Professor Peter Karmel

Professor Peter Karmel had a rich and varied professional life, as both a successful academic and economist, developer of public policy and university administrator. As a humane liberal thinker Professor Karmel wished to utilise economic theory and the education system to provide opportunities for all in an equitable way. His vision for Australia and the education system was as broad as it was deep, with strong commitments to the arts, as demonstrated by the generous Peter and Lena Karmel Anniversary Awards for Art and Music established at ANU through the Endowment for Excellence. These Awards were established in 1997 and since that time have helped over 18 young artists and musicians.

To briefly capture the range of contributions that Professor Karmel made to ANU and to education itself is no easy task. In his academic life he made a significant contribution to macroeconomic analysis and wages policy in Australia. He also thrived as a leader within Australian universities, being appointed as a Professor of Economics at Adelaide University at 28, the first Vice-Chancellor of Flinders University in 1966 and establishing a long relationship with ANU, including his Vice-Chancellorship from 1982-1987. Professor Karmel's passion for excellence, for education and for equality will be long remembered at ANU by his former colleagues, his friends and those he inspired.

WORKPLACE GIVING AT ANU

ANU has operated a Workplace Giving program through the Human Resources Division since 2006. Over that period of time ANU staff members have supported 14 local charities and ANU projects fortnightly through salary sacrificing. In 2009 approximately \$400,000 was distributed throughout the community.

It is amazing what can be achieved by all giving a little. The regular income stream of donations provides a vital and positive difference to the people's lives that all of these charitable projects support.

In addition to the 15 projects listed on the ANU website, ANU staff members have also supported national appeals for the Victorian Bushfire, the Pacific Tsunami, Typhoon Ketsana, and the Indonesian Earthquake. The total given to these appeals exceeded \$10,000.

Workplace Giving is a simple yet powerful way for employees to assist charities, both large and small, via regular payroll deductions. Workplace Giving provides people in the workplace a safe, efficient and easy way to support without having to worry about keeping tax receipts.

Workplace Giving donations are deducted from staff salaries before tax is applied, thus reducing taxable income.

We thank all of the current staff members who have supported and continue to support these very real and vital causes through the workplace giving program and encourage more to take up the challenge to swap a weekly coffee for a \$5-\$10 donation fortnightly to a community charity or ANU project.



MAJOR BENEFACTORS

Many of our donors stand out for their exceptional generosity to the University over the years. Without the major support provided by these donors many scholarships, academic posts and research programs could not be sustained.

These individuals and organisations have supported the Endowment by donating more than \$2 million, for which the whole ANU community is thankful for their support.

Ms (Gwendolyn) Beryl John (bequest)
Mr (John) Orde Poynton (bequest)
Dr Ethel Tory (bequest)
BHP Billiton
Rio Tinto

The following individuals and organisations have supported the Endowment by donating between \$250,000 and \$2 million. We thank them sincerely for their gift.

ActewAGL Distribution
ACTEW Corporation Limited
The Al-Maktoum Foundation
Australian Consortium for Social and Political Research
Mr Anthony and Mrs Barbara Brookman
Burgmann College
Professor Herbert Burton (bequest)
Miss Joan Duffield
Emeritus Professor Frank Fenner AC
Dr Alan Finkel AM and Dr Elizabeth Finkel
Mrs Valmae Freilich and Dr Herbert Freilich AM (Herbert sadly passed away in July 2009)
Mr Barry Goldsmith (bequest)
Mr Dennis Griffin (bequest)
Government of the Republic of Iran
Korea Foundation
Reverend Professor Hans Mol and Mrs Ruth Mol
Professor Patrick Moore
National Health Sciences Centre
Plan B Trustees Limited
POSCO Australia Pty Ltd
Emeritus Professor Ian G. Ross AO (bequest)
Emeritus Professor Deane Terrell AO and Mrs Jenny Terrell
Government of the Republic of Turkey
Lady Joyce Wilson (Joyce sadly passed away in August 2009)
Dr Gwen Woodroffe
Professor Stephen Wurm and Dr Helen Wurm (bequest)
Dr Elspeth Young (bequest)

The following individuals and organisations have supported the Endowment by donating between \$75,000 and \$249,999. We gratefully recognise their support and commitment.

Professor Jan Anderson
Emeritus Professor Henry Bennett
Mr Noel Bland (bequest)
CRASys
Emeritus Professor Bob Crompton AM and Mrs Helen Crompton
Mr Ante Dabro and Mrs Vicki Dabro
Mr Geoffrey Evers
Vincent Fairfax Family Foundation
Dr Joyce Fildes OAM
Mr Anthony Granucci (bequest)
Peter and Patricia Gruber Foundation
Dr David Gruen
Dr Nicholas Gruen
Emeritus Professor Peter Karmel AC, CBE and Mrs Lena Karmel (Peter sadly passed away
December 2008)
Lee Foundation
Ms Anne Long (bequest)
Dr Christopher and Mrs Bhama Parish
Emeritus Professor Mervyn Paterson and Mrs Katalin Paterson
Dr Ruth Pfanner
Emerita Professor Beryl Rawson
Mrs Ruth Rodgers
Miss Caroline Simpson (deceased)
Sochon Foundation
Statspan Pty Ltd
Emeritus Professor Peter Treacy and Mrs Barbara Treacy
Ms Joan Thorp (bequest)
The Honourable Mr Ian Wilson AM

The following individuals and organisations have supported the Endowment by donating between \$25,000 and \$74,999. We thank them sincerely for their gift.

ACTION Trust
Emeritus Professor Gordon Ada
ANZ Bank Trust
Mrs Joyce Armbruster and Mr John Armbruster
Australian Securities Exchange
Australian Women of the Year Awards
Baker & McKenzie
The Hon. Emeritus Professor Peter Baume AC and Mrs Jenny Baume

The Harper Bernays Charitable Trust

Mr Vijay Boyapati

Bruce Hall

Mr Phil Bunyan and Mrs Susan Bunyan

Mr John Bok and Mrs Joan Bok

Dr Mary Carver

Capital Television

Capral Aluminium

Winston Churchill Memorial Trust

Coca-Cola Amatil Limited

Mr Ken Crawford (Ken sadly passed away in August 2009)

Dr Bob Day and Mrs Judith Day

Mr Glen Eggen and Mrs Elise Eggen

Mr Henry Ergas

Fieldforce Services Pty Ltd

Mr Ken Fowler and Mrs Vera Fowler (bequest)

Professor Joe Gani AM

Mrs Margaret Gibb (deceased)

Professor Ross Garnaut

Mr Al-Ghandi

Glass Insulation Pty Ltd

Ms Christine Goode

Ms Pauline Griffin AM

Ms Amanda Harkness

Mr Tony Hartnell AM and Mrs Maryed Hartnell

Emeritus Professor Peter Herbst (deceased) and Mrs Valerie Herbst

Ms Victoria Jubb and Mr John Martinez

Mr Eric Klestadt (bequest)

Mr Frank Kornfeld

Association of Lions Clubs Inc.

Lord Mayor's Charitable Fund (Melbourne)

Mathys Australia Pty Ltd

Dr Betty Meehan

Menzies Foundation

Mercantile Mutual Holdings Limited

Mr John Milne

Mr John Mitchell

The Myer Foundation

National Mutual Ltd (AXA)

Mrs Liz Nathan and Mr Vis Nathan (deceased)

P&O Australia

Mr Giles Pickford

Dr Roslyn Poignant
Mr Trevor Punnet
Thyne Reid Foundation
Dr Anna Rickards
Rotary Club of Canberra East
Rotary Club of Canberra Belconnen
Rotary Club of Canberra North
Mr Joseph Santamaria, Esq, QC
Mrs Joy Selby-Smith
Dr John Seymour and Dr Heather Munro
Dr David Smiles and Ms Marie Keir
Dr Ernest Spinner (bequest)
Mr Haddon Spurgeon
Sun Microsystems
Royal Thai Embassy
Dr Guy White and Ms Belinda Kendall-White
Mr Graham Wilkinson and Mrs Muriel Wilkinson (bequest)
Mr Michael Wilson and Mrs Jane Wilson
Zimmer Pty Ltd

Anonymous donations

ANU respects the right of benefactors to remain anonymous and is committed to ensuring their privacy. To date, several anonymous major donors have supported the University and its activities.

WITH THANKS TO...

This additional assistance has been greatly appreciated and will aid in easing some of the financial burden involved with living away from home and attempting to complete a university degree.

Courtney Carr, funding recipient

We are grateful to each individual and organisation listed below who donated to the Endowment for Excellence and other areas of ANU in 2009. Thank you for your generosity.

Mr Christopher Abbott AM	Dr Norman Boardman AO
ACT Division of General Practice	Bootes Foundation
ACTEW Corporation Limited	Professor Francis Bowen
ActewAGL Distribution	Mr John Bowen
Mr Peter Adams	Ms Sue Bradbury
Ms Lisa Addison	Mr Anthony Breuer
Dr Tomoko Akami	Father Arthur Bridge OAM
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 Mr Richard Forster
 Mr Robert Foster and
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 Dr Ronald Francis
 Ms Sarah Franks
 Professor David Fraser
 Mrs Valmae Freilich and Dr Herbert
 Freilich (Herbert sadly passed
 away in July 2009)
 Ms Alleeta French
 Mr Brenden French
 Mrs Margaret Frey and
 Mr Wilfred Frey
 Friends of the Canberra School of
 Music Inc.
 Mrs Denise Frost
 Mrs Felicity M. Fullagar
 Dr Wilfred K. Fullagar
 Ms Katherine Gallagher MLA
 Professor Helen Gamble
 Professor John Gascoigne

Thanks to the contribution that was made by ANU as part of the grant-match, this has helped me get by a lot easier during the first year, and has helped pay for essential things needed for my courses, such as textbooks, and helped pay for a notebook computer of my own. As you can imagine, being a Computer Science student, this acquisition is very helpful to my studies.

Kalinga Hulugalle, who received additional funding from ANU as a recipient of the Narrabri Education Foundation scholarships.

To a person of my background, having a helping hand for tertiary study is not only a great immediate help financially, but also a long term motivational tool to continue to excel in my studies. To this end, I thank you with the utmost sincerity for your help, and I hope this investment will bear fruit in the future.

Matthew Malone, funding recipient

Professor Paul Gatenby AM
Mr Matthew Geake
Mr William Geering
Mr Hugh Gibbon
Mrs Helen Gibson
Ms Jean Gifford
Mrs Elizabeth Gilchrist and
 Mr H. Gilchrist
Mrs Sonia Gilderdale
Dr William Gladstones
Mr A.Y. Glikson
Mr Darren Glover
Mr Victor Gomersall
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Mr George Gornacz
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 Mr John Hindmarsh
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 (Peter sadly passed away in
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Professor Kieran Kirk
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 Mr Roger Leeming
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 Professor Neville Norman
 Mr Brett Odgers
 Mr Ross O'Donoghue
 Ms Quentin O'Keefe and
 Mr Roderick Cheatley
 Dr Guy Olding

The contribution of these funds cannot be underestimated in the capacity they have to ease the financial pressure of self supporting students such as myself. As such I am grateful to the ongoing partnership between The Australian National University and the Goulburn and District Education Foundation and their continuing support of students from rural areas pursuing higher education.

Bridget O'Kane, who received additional funding from ANU as a recipient of the Goulburn and District Education Foundation scholarships.

I am writing to express my gratitude for the decision of The Australian National University to co-fund my financial assistance from the Yass District Education Foundation for the second year in a row. I am currently involved in a number of musical, sporting and community organisations. This, along with the freedom to devote the necessary time to achieve my academic goals...itself is a consequence of the assistance I am receiving.

Alistair McGregor, who received additional funding from ANU as a recipient of the Yass District Education Foundation scholarships.

Mr John Oliver	Mr Nicholas Rodgers
Ms Carmel O'Regan	Dr Gerard Roe
Dr Terrence O'Rourke	Dr Andree Rosenfeld
Our Community	Mr J.M. and Mrs C. Round
Ms Penelope Ovington	Mr Robert Routh
Oxford University Press	Dr Donald Rowland and
P S News Pty Ltd	Mrs Jennifer Rowland
Mr John Packer	Royal College of Physicians
Mrs Carolyn Page	Royal Thai Embassy
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Ms Rhian Parker	Ms Julia Ryan
Mrs Ruth Parker	Mr Owen Ryan
Mrs Trish Parker	Sabbia Gallery
Ms Helen Parkes	Mr Horace Saducas
Emeritus Professor Mervyn Paterson	Takashi Sakazume
and Mrs Katalin Paterson	Ms Farnaz Salehzadeh
Mr Michael Payne	Sans Souci Trust
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Mrs Christine Purdon	Ms Dawn Smith
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Mr Thomas Reid	Professor Matthew Spriggs
Dr Anna Rickards	Mr Haddon Spurgeon
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Mr Allan Rimington	Professor Will Steffen
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Professor Shiu Wong
Mrs Patricia Woolcock
Dr William Woolcock
Mr Alan Wyburn
Mrs Jennifer Yeats
Dr Brian Young
Mr Jimmy Zhang
Emeritus Professor Leslie Zines AO
Zonta Club of Canberra Breakfast Inc

Your generous scholarship will really make a difference and assist in paying for the significant expenses of attending university... I have no doubt that without such contributions I would not have been able to afford these costs. Thank you for helping me move forward towards my dreams and reach the goals I have held so closely to me for many years. I am forever indebted to the West Wyalong and District Country Education Fund, The Australian National University and to all of the kind people who made it possible.

Aliesha Martin, who received additional funding from ANU as a recipient of the West Wyalong and District Country Education Fund.

MINORU HOKARI SCHOLARSHIP

Five years have passed since the untimely death of promising scholar Minoru Hokari. This inspirational researcher sought to develop new kinds of cross-cultural dialogue and historical practice based upon his fieldwork conducted with the Gurindji people. Hokari's work with the Gurindji people, living 460km southwest of Katherine in the Victoria River region of the Northern Territory, allowed him to develop new ideas regarding 'cross-culturalising' historical practice based on a respectful and collaborative research strategy with Indigenous Australians.

Following a 10-month battle with cancer, in his final days, Minoru Hokari said "[w]ho I am now exists in being connected to you, and that connection is what has supported me all these years and is supporting me now". In maintaining that connection, family, friends and colleagues have established the Minoru Hokari Scholarship in his memory. The scholarship is designed to assist graduate students conduct fieldwork or related research in Australian Indigenous history. In 2009 this scholarship was awarded to Abby Cooper, Australian Centre for Indigenous History at ANU, for her research on the intersection between the development of Indigenous identities and the sporting history of the Wimmera Region in Victoria. Due to the ongoing support of family, friends and supporters of Australian history this scholarship continues to expand and the research that Minoru was so passionate about will be carried on by graduate students in the future.



Wildflowers on ANU campus.

*Who I am now exists in
being connected to you, and
that connection is what has
supported me all these years
and is supporting me now.*

Minoru Hokari

SOCHON FOUNDATION SCHOLARSHIPS

In 2009 ANU was pleased to establish the Sochon Foundation Scholarships in Korean Studies. These scholarships were made possible by a generous contribution from the Sochon Foundation. Madame Sochon Young Hi Park, the founder of the Sochon Foundation, was able to visit ANU in November 2009, and noted the strong common commitment to academic excellence that her Foundation and ANU share.

The initial idea for the Sochon Foundation was born in the wake of the Korean War, through Madame Park's mother, Madame Lee Soo Bok. She saw the potential for hope through education and ensured that her daughter, who became an accomplished mathematician and poet, would be given the opportunity to receive a tertiary education.

The Sochon Foundation has developed ties with a number of world class institutions to ensure a continuing commitment to the study of Korean language, history, politics and literature. At ANU, the Sochon Foundation Scholarships are designed to support graduate study in Korean Studies. Madame Park reflected on her commitment to education:

"I believe that funds should be allocated where they can do the most good, and there is no area that does more to help develop humankind than education. As vast as our world may be, it is becoming ever more interconnected, so that each of us really needs one another".

This generous endowment will provide assistance to a new generation of Australian graduate students to further engage and understand one of our region's most interesting and complex cultures.

*As vast as our world may be,
it is becoming ever more
interconnected, so that each
of us really needs one another.*

Madame Sochon Young Hi Park



Professor Ian Chubb AC, Vice-Chancellor
and Madame Sochon Young Hi Park
(photo by Stuart Hay).

ANU CODE OF PRACTICE FOR PHILANTHROPY

(adapted from the Australian Vice-Chancellors' Committee, 2000)

Australian Universities have a long and distinguished history of philanthropic support from generous benefactors. It is a tradition of giving and sharing that is vital to the role of Universities in advancing knowledge for the common good. Universities recognise that the support of well-motivated citizens and corporations will always be important. Equally, there are many in society eager to make a lasting contribution to the role that Universities play. To ensure that Universities earn and maintain the respect and trust of the general public, and that Donors and prospective Donors can have full confidence in the University, ANU has committed itself to this Code of Practice.

Responsibilities of the University

1. The University will welcome and respect the interest of individuals and organisations seeking to contribute to the University.
2. The University will ensure that University staff engaged in Donor liaison and the soliciting of gifts do not grant or accept favours for personal gain and avoid actual or apparent conflicts of interest.
3. The University will ensure that all personnel involved in managing gifts exercise prudent judgement in their stewardship responsibilities.
4. The University will ensure that only authorised representatives of the University undertake solicitation of gifts.
5. The University will not seek or accept gifts where this would be inconsistent with the University's mission.
6. The University will at all times respect information about Donors and prospective Donors and their gifts and will ensure that such information is handled confidentially, to the extent provided by law and consistent with the Donor's wishes.
7. The University will ensure that potential Donors are encouraged to seek independent professional advice about the taxation status and any other business or legal implications of their gifts or potential gifts. University staff may work with such advisers to assist with gift arrangements.
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9. The University will ensure that all gifts are treated in accordance with the Donor's wishes, to the extent consistent with the letter and spirit of the law.
10. The University will ensure that all gifts are dealt with in accordance with all laws and regulations applicable.
11. The University will confirm the acceptance of all gifts in writing.
12. The University reserves the right to decline a gift for any reason.
13. The University will ensure that all Donors have access to its most recent published financial statements.
14. The University will ensure that Donors receive prompt, truthful and complete answers to their inquiries.
15. The University will ensure that all Donors receive appropriate acknowledgment and recognition being mindful of the donor's wishes.

Rights of the Donor

1. A Donor can expect to be informed of the University's mission, of the way the University intends to use the gift, and of its capacity to use gifts effectively for their intended purposes.
2. A Donor can expect that the University and its staff will actively and positively provide relevant information on the University, and the use of, and progress with, the gift.
3. A Donor can expect that the behaviour of individuals representing the University will be professional in nature.
4. A Donor can expect to be informed whether those seeking gifts from them are volunteers, University staff, or engaged agents.
5. A Donor can expect that their details will be treated confidentially and will not be shared with any organisation outside the University without their explicit permission.
6. A Donor can expect to be informed of the identity of the University's key personnel involved in managing the gift.



Wildflowers on ANU campus.

FINANCIAL REPORTS

The Australian National University

Balance Sheet

As at: 31/12/2009

Endowment for Excellence

	31/12/2009 \$'000s	31/12/2008 \$'000s ⁽¹⁾
<u>EQUITY</u>		
Accumulated Funds	247,011	250,498
Reserves		
Asset Revaluation Reserve	5,429	(19,462)
Total Reserves	5,429	(19,462)
TOTAL EQUITY	\$252,440	\$231,037
<u>ASSETS AND LIABILITIES</u>		
Financial Assets		
Cash Balance	70,625	69,345
Receivables	11	25
Investments - LTIP	181,832	161,383
Investments - Direct Share Holdings	11	315
Total Financial Assets	252,480	231,068
Financial Liabilities		
Creditors	(6)	(10)
Provisions	(33)	(21)
Total Financial Liabilities	(39)	(32)
NET ASSETS	\$252,440	\$231,037

Note:

1. Council approved the removal of the ANU CSS Reserve and CSS Account No. 2 fund from the ANU Endowment for Excellence as at the 31/12/2009. For comparative purposes the 2008 net asset figure of \$627,509m has been adjusted by \$396,473m to reflect the removal of these two funds.

The Australian National University
Income Statement
for the period ending 31 December 2009
Endowment for Excellence

	31/12/2009 \$'000's	31/12/2008 \$'000s
ENDOWMENT FOR EXCELLENCE		
<u>Operating Income</u>		
Donations	6,965	8,979
Investment Income	9,619	14,972
Other	2,627	118
Total Operating Income	19,211	24,069
<u>Operating Expenditure</u>		
Scholarships & Stipends	2,310	2,160
Chairs	790	941
Academic Salaries and Oncosts	202	129
Non-Academic Salaries and Oncosts	13	37
Consumables	95	59
Research Conferences & Travel	1,511	1,213
Research Projects	1,421	770
Other Expenditure	2,694	3,035
Total Operating Expenditure	9,035	8,344
Endowment for Excellence Operating Surplus(Deficit)	\$10,177	\$15,724
<u>Other Comprehensive Expenditure</u>		
Operating Result for the period	10,177	15,724
Losses on Realisation	4,864	8,079
Transfers from Endowment for Excellence	8,800	5,000
Total Other Comprehensive Expenditure	13,664	13,079
Total Net Operating Surplus(Deficit)	(\$3,487)	\$2,646

**The Australian National University
Endowment for Excellence
2009 Annual Report**

Endowment for Excellence, Financial Report Summary

	1		2	3
	2009	2008	2009	2008
	Total	Total	Total	Total
	Corpus	Corpus	Assets	Assets
	\$	\$	\$	\$
Named Scholarships and Prizes	20,279,915	21,650,060	34,977,884	27,446,038
ANU Excellence & Renewal Program	45,859,614	47,051,829	74,848,181	65,010,589
Inter-institutional Arrangements	6,705,264	6,629,284	9,855,439	8,256,255
Named Foundations	3,792,078	3,792,078	7,302,078	5,860,870
Endowment Total	76,636,871	79,123,251	126,983,582	106,573,751
University Funds	52,997,543	27,000,000	125,484,621	124,458,824
GRAND TOTAL	129,634,414	106,123,251	252,468,203	231,032,575
Add: Receivables			11,310	25,400
Less: Provisions			(39,198)	(21,322)
TOTAL EQUITY per Balance Sheet			\$252,440,315	\$231,036,653

Notes

1. Corpus donations plus indexation at CPI rate on funds preserved in real terms
2. Sum of LTIP, Shares and Cash on Hand
3. Council approved the removal of the ANU CSS Reserve and CSS Account No. 2 fund from the ANU Endowment for Excellence as at the 31/12/2009. For comparative purposes the 2008 Total Assets value has been adjusted to reflect the removal of these two funds.

"This is an institution which has remained, as it began, a truly and uniquely national university..."

It's a university which has maintained from the outset an uncompromising passion for excellence..."

Professor the Honourable Gareth Evans AO QC
Chancellor



This artefact was thoughtfully donated by Stephen and Helen Wurm whose major gift to ANU has already funded two PhD students in linguistics. Our fragile linguistic heritage needs further support, to learn more visit anu.edu.au/endowment.

Photograph by Stuart Hay.