

59th ANNUAL REPORT 2020
HARVARD CLUB OF AUSTRALIA INC
ABN 70 814 606 610
and its subsidiary
HCA PHILANTHROPY PTY LTD
ABN 93 091 483 635

President – Elizabeth Carr, AM MP/MC '04
Vice-President for Members – David Pumphrey, MBA '70
Vice President for Harvard – Peter Hasko, PMD '93
Vice President for Chapters and SIGs – Yu Zhang,, LLM '10
Vice President for Australia – Christopher Smith, MBA '77
Vice President for Club – Tom Saar, MBA '87
Vice President for Finance - Matt Loughnan, GMP '16
Deputy Vice President for Members - Aliaa Remtilla, AB '05
Deputy Vice President for Australia - Melinda Muth, MBA '81
Deputy Vice President for Australia - Jon Chambers, OPM '91
Administrator - Justina Blackman
Public Officer - Justina Blackman

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Chapter Convenors
Queensland – Jon Lindsay, MBA '87
ACT – Jamie Snashall, MPA '08
Western Australia – Anis Inayat-Hussain, GMP '08
Adelaide - Amanda Rischbieth, ALI Fellow '17

HCA Philanthropy Pty Ltd Directors
Christopher Smith MBA'77 (Chairman), Melinda Muth MBA'81 (Secretary and Director),
Justin Greiner MBA'00, Jon Chambers OPM'91, Kimberly Everett MUP'98 and Matthew
Loughnan GMP '16

**The 59th Annual General Meeting of the Harvard Club of Australia Inc. will be held on
June 23rd 2021 via Zoom commencing at 6.00pm**

Agenda

1. Apologies
2. Confirmation of minutes of previous Annual General Meeting. The 58th Annual General Meeting of the Harvard Club of Australia Inc. was held on 18th June 2020 commencing at 6.00pm via zoom. Minutes, for confirmation, are on the following page.

3. Presidents' report

Club President Elizabeth Carr AM will provide an update on the last year's activities. The President's report is published in this report and available on the club website under "Governance".

4. Approval of annual financial statements

Approval of the financial statements for the Club for the year ended 31 December 2020. The financial statements are published in this Annual Report and available on the club website under "Governance".

5. Election of auditors

The HCA's auditor is Quest Chartered Accountants. We propose to reappoint them to act as auditors for the coming financial year.

6. Election of Officers

Under the Constitution, the President serves two years in office, and the Vice Presidents serve a maximum of three years before re-election.

Elizabeth Carr AM was elected at the AGM on June 18th 2020 and remains in office.

Vice Presidents Christopher Smith, and Tom Saar were elected on 12th June 2018 and stand for re-election.

Yu Zhang was appointed Vice President for Chapters and SIGS by the Board on 17th August 2020 and submits his nomination for election by members.

Peter Hasko is stepping down as Vice-President Harvard. Kathryn Suttor submits her nomination for election for members.

7. Presentation of Harvard Club of Australia Award(s)

Awards will be presented:

- Lifetime Membership
- Spirit of Australia

8. General business

Opportunity for members to raise any matters of general business.

By order of the Council

Justina Blackman

Public Officer and Secretary, Harvard Club of Australia Inc.

Harvard Club of Australia Minutes
58th Annual General Meeting
18th June 2020
Held via Zoom platform

1. Attendance and Apologies

The AGM was attended by approximately 40 HCA councillors, members and guests. Apologies were received from Aliaa Remtilla and Nayana Vootakuru.

The President, Charles Graham opened the meeting at 5.00pm and introduced the guest speaker, Alan Tudge, AM, MP. Alan spoke on Australia's management of COVID19 and the pathway out.

2. Approval of minutes of prior AGM

The minutes of the 57th Annual General Meeting of the Harvard Club of Australia held on 27th June 2019 having been circulated to members at the Meeting, were taken as read. Motion to approve proposed by Elizabeth Carr and seconded by Chris Smith

It was resolved that the minutes be confirmed as a true and correct record of the 57th Annual General Meeting.

3. President's Report

Charles Graham summarised his 2019 President's Report covering the following areas:

- The immense benefits of the HCA Philanthropy fundraising through the Program for Leaders to support six scholarship programs. He acknowledged Chris Smith and Melinda Muth for their contribution.
- The core values of the club remain the same; inclusiveness, empowerment, excellence, integrity and generosity.
- The reach of scholarships and acknowledgement of those who make the scholarships possible. Thanks to members who donate and who serve on selection panels.
- The first Principals Centre in Australia, held in January of this year with 171 Principals attending, 56 of whom were funded by scholarships.
- Public Health seminars held in Sydney, Canberra and Melbourne for the first time in 2019 with Harvard Professor John McDonough.
- 52 Club events across Australia in 2019 with attendance of over 1,300 people.
- Expansion of the mentoring program, building on the success of previous years.
- Chapter events held in Canberra, Brisbane and Perth.
- Tom Saar attended the global HAA conference and was successful in obtaining a Magnet license for the Club.
- HCA book prize extended in 2019.
- Sympathy to members affected by COVID-19, bushfires and droughts.
- Noted significant financial impact as a consequence of not being able to hold the Leadership Programs this year.

The full President's Report for 2019 published in the 58th Annual Report was confirmed as a true and accurate record.

4. Approval of Annual Financial Statements

The President drew members' attention to the Financial Statements for the year ended 31 December 2019 as reviewed by Quest Accounting.

Approval of the financial statements was moved by Matt Loughnan and seconded by Peter Hasko.

It was resolved that the Financial Statements for the Club for the year ended 31 December 2019 and the report of the Councillors and Auditors be approved and adopted.

5. Appointment of Auditor

It was resolved that Quest Chartered Accountants be reappointed to act again as auditors for HCA Inc and HCA Philanthropy Pty Ltd in 2021.

6. Election of Office Bearers

Elizabeth Carr nominated for President by Peter Hasko and seconded by Tom Saar.

David Pumphrey nominated for VP of Members by Tom Saar and seconded Matt Loughnan.

Kimberly Everett resigned from the HCA Board.

7. General Business

Charles opened the meeting to questions.

The Spirit of HCA Award was awarded to Ricky Campbell-Allen for her contributions to the Club over many years and especially for her work with the recent Principals' Program in Australia.

The meeting was declared closed at 6.37pm.

HCA President's Report for 2020

I begin the 2020 HCA President's Report by acknowledging the death on 25 November 2020 of our Patron, benefactor, past President and extraordinary man, James D (Jim) Wolfensohn KBE AO.

On 9 March 2021 the Harvard Club of Australia and the University of Sydney held a significant and moving Memorial in the Great Hall attended by friends, colleagues and Australians he has quietly helped and supported over decades. After reading Jim's autobiography (well worth the read may I add) – "A Global Life" I was touched not just by his extraordinary energy, his great gifts – intellectually and artistically – but mostly by his humanity. His desire to give back. To make our global society stronger. He did this naturally through his role as President of the World Bank – but more importantly for Australians by his extraordinary generosity – financially and of spirit. Over 115 Australians through the Menzies and Wolfensohn Scholarships have attended Harvard University, seen the world beyond their shores, been educated and enlightened, made enduring friendships – thanks to James Wolfensohn's vision to think beyond himself. Please note at the end of this report an extraordinary letter written by Prime Minister Scott Morrison acknowledging his service.

I also acknowledge the passing of a dear and active member of our community - Vimpi Juneja MBA '00 and winner of a Clive Gard Scholarship in 2017. He left us on 26th March 2021, aged 51. We extend our heartfelt sympathy to his family.

2020 also saw Australia and Australians endure fires, floods, plagues and of course the pandemic. I extend my sympathies to all members and their families. I also extend my sympathies to members of our community who have family overseas, particularly in the USA, who have experienced significant hardships. The strength of our community was evidenced

as people calmly, quietly and without fuss pulled together behind the scenes. Thank you most sincerely.

The year that was 2020.

January 2020 began with extraordinary expectations and enthusiasm. We held our first Principals Centre in Australia presented by Harvard Graduate School of Education (HGSE), with 171 Principals attending. 56 were HCA scholarship attendees, including a total of nine offered by Wesfarmers, Coles Supermarkets and the Aurora Education Foundation. At the 2020 AGM we acknowledged Ricky Campbell-Allen in particular for her leadership for this Program with the Spirit of HCA Award. Congratulations again – and thank you Ricky!

February continued at a pace with 6 events held including Monday Club with Elizabeth McGregor, an Art Gallery tour organised by Tempe McGregor and a continuation of our Masterclass series – this time on artificial intelligence.

Then we were asked to stay home. I was so impressed with how the Harvard Club of Australia community came together during this period. As we moved to online activities, we were able to truly be the Harvard Club of Australia – rather than for individual cities or States. From May till year end we held 26 events around Australia – 19 of them virtually, including our first online AGM with Alan Tudge MP MBA '01 as guest speaker. We broadened our speaker base by including guest speakers throughout Australia, Europe, Israel and the USA. We were also able to tap into online events and education activities being held by Harvard University and other Harvard Clubs globally. I hope to continue to hold online, in-person and hybrid events as this truly ensures we can represent all members of our community in Australia and overseas. It also allowed members to be a part of the community at times and places that were convenient to them. One member confirmed they listened to a Monday Club whilst in surgery!

During 2020 we undertook a member wide survey. Well over 100 members responded, from all states, all age groups and all Harvard schools. The results gave us valuable information of what is important to you, how members felt about the Club -- why you joined, how satisfied you are with different aspects of the Club and what HCA can do to improve. The results proved incredibly useful and have fed directly into our planning.

We received an encouraging satisfaction score of 8.2/10 and an NPS score of 38. This is the first time we have been able to measure the net promoter score. Over 80% of respondents are satisfied, see 'value for money' and are willing to contribute to the Club. The 20% provided valuable insights into how we can ensure HCA has 'something for everyone'. For example, the key unmet need of less satisfied members is networking. In response, we have already launched new social and professional networking programs.

More broadly, we analysed the results by demographic segment (age, gender, location, school, tenure) which has given us insights to evolve the Club's offering. For example, it is clear that different age groups have different preferences around social events, speaker/cultural events, professional development, mentoring and philanthropy, as well as formats and time of day. As a result, we are reviewing our event calendar to ensure a rich variety for all ages. We also learned that members desire a combination of in-person and Zoom events going forward, as it provides more convenient access for a larger number of members.

Being a member-driven organisation, we intend to run the survey every year or so in order to assess progress and continuously improve. Thank you again to everyone who took the time to complete it.

The Club itself

At the end of 2020 the Harvard Club of Australia had 468 paid members and we continue to improve the gender, age and Harvard school diversity of our membership.

I wish to personally thank Charlie Graham as the outgoing President of our club (2018-2020). Charlie steered the ship during our period of embedding the Strategic Plan and helped lay the foundations for a strong and revitalised club. Thank you most sincerely!

The Board structure continues with five Vice President's supporting the President. This structure is serving us well for a balance of reach and efficiency. During 2020 we welcomed Yu Zhang (LLM '10) as the Vice President Chapters and SIGS. We also welcomed three new positions of assistant Vice Presidents Aliaa Remtilla AB '05, Melinda Muth MBA '81 and Jon Chambers OPM '91. The revitalised structure also has 41 Program Leaders (PLs) working on innovative programs and ideas. On behalf of all members, I sincerely thank each of the Board members and PLs for their leadership and contribution to the club. The more people that are involved, the more we are able to make a positive contribution to our community. Thank you.

As a club we are very fortunate to have Justina Blackman as the glue that binds us all together - the one that ties the bows and ensures that everything in the background runs smoothly and efficiently. Thank you for the many hours you dedicate to our community Justina.

Membership however continues to be a focus for all clubs – ensuring we have the right “product”, the right “team” and the right “processes” is vital. We know that a minimum of 600 members is our goal. In the last 12 months the survey helped us to understand what is important for our offerings to members. In addition, we also made the transition to Magnet – the HAA membership database. This will be invaluable for us going forward to know who are eligible to become members and we can now proactively welcome them to the community. As with all IT projects there were some teething problems, but we are comfortable that significant progress has been made and this project will ensure we have strengthened our foundations for the future.

For Australia

We concluded the most effective learning for scholarship winners will be in person programs at Harvard. The only scholarships awarded in 2020 were for two R.G. Menzies Scholars undertaking multi year programs at Harvard. We will recommence once the Harvard University campus is again open to students. Members have continued to make donations to the Harvard Club of Australia and HCA Philanthropy in preparation for the time we can award more scholarships. I thank them most sincerely.

We had to cancel the 2020 Program for Leaders due to travel restrictions imposed by the pandemic on both faculty and local participants. This has impacted the immediate financial outlook for HCA Philanthropy - both because we had to absorb set up costs of the cancelled program and the loss of income. Without this source of funding we may need to scale back the value and volume of scholarships we can offer. In the short term we have some distributions from HCA Foundation to support our scholarship offering.

We continued our relationship with the Business school with the Masterclass initiative which has continued to be a very positive program and keeps us in front of executives interested in attending our Program for Leaders when we are able to recommence. I particularly thank Melinda Muth for her energy and professionalism in leading this exciting initiative.

For Harvard

The Pandemic has meant that a number of Australians admitted to Harvard have studied remotely in Australia. Thanks to a number of members we have provided a “Harvard away from Harvard” experience for them through social media initially and then dinners.

In 2020 we awarded the Harvard Book Prize to 12 schools across Sydney and Perth. At each school, an outstanding Year 11 student demonstrating academic and extracurricular excellence was selected as the recipient of the Prize and presented with “The Harvard Book” by William Bentinck-Smith. Going forward, we hope to recognize students at more high schools across Australia by linking with principals attending the Principals Centre in Australia, attracting talented young people to the opportunity to study at Harvard College.

I am also delighted to confirm that Hon. Nick Greiner AO MBA ‘70 has agreed to be the Harvard Club of Australia’s first “Ambassador at Large”. As the newly appointed Australian Consul General to New York he is in the perfect location to assist with the goals of connecting Australia, Australians and Harvard University together. As a dedicated member of our club and community we thank him for so generously and enthusiastically agreeing to be a part of the larger team.

Crimson Fellows

Each year, we celebrate our newest Crimson Fellows – being members with 25 years continuous membership of the Harvard Club of Australia. This year we welcome three new Crimson Fellows. Thank you most sincerely for all that you do. Thank you for your faith in the club and its goals and values by remaining so loyal for over 25 years.

- Chris Beare
- Andrew Dutkiewicz
- David Highman
- Alice Killen

We also acknowledge the death of HBS Prof. David F. Hawkins, an Australian who served HBS from 1962 as a professor teaching financial reporting and control; and Peter Watt, a long time member who joined our Club in 1992.

Looking forward

After a year of reflection and changed perspectives I look forward to working with the many new and long-time members of the Harvard community who are finding innovative ways to strengthen the ties between Australia, its citizens and our alma mater – Harvard University.

Thank you for your contribution to the Harvard community in Australia.

Best wishes

Elizabeth Carr AM

President - Harvard Club of Australia



PRIME MINISTER

MESSAGE FROM THE PRIME MINISTER

SIR JAMES WOLFENSOHN KBE AO

I am pleased that the University of Sydney and the Harvard Club of Australia are commemorating the life of James Wolfensohn.

James Wolfensohn was a great Australian and a towering citizen of the world.

His was an extraordinary life: an Olympian, international banker, philanthropist, supporter of the arts, and international leader. His steady progress to positions of leadership and influence in the financial centres of the world, belied the vistas of his childhood in suburban Sydney.

In his early 20s, James left Australia in pursuit of his dreams. Yet no matter where he was he carried with him an affinity for the land of his birth. His delight in reclaiming his Australian citizenship in 2010 was a measure of that bond.

James Wolfensohn's life had a global impact and his countless achievements redound to the splendour of his worldview. His beliefs — enacted in his role as president of the World Bank and as a magnificent philanthropist — shaped his legacy.

In word and deed, he made *tzedaka* — charity — manifest.

James thought deeply about philanthropy, and spoke of it often. His summation 'if you have wealth, you have to share it', is as simple as it is profound.

It also applied more broadly to the other riches James Wolfensohn possessed. Riches of wisdom, experience and insight, which he shared with the legislators and decision-makers of the world.

He pursued his determination to make the world a better place without fear or favour. Australia, like so many other nations, was the beneficiary of his ambition and achievements — as an adviser, a donor and a visionary.

Australia applauded James Wolfensohn in life, and we will proudly tend his memory in death.

May his memory be a blessing.

A handwritten signature in blue ink, appearing to read 'Scott Morrison'.

The Hon Scott Morrison MP
Prime Minister of Australia

March 2021

Parliament House CANBERRA ACT 2600
Telephone (02) 6277 7700
www.pm.gov.au

Philanthropy Report 2020

HCA Philanthropy Pty Limited (HCAP) is the only subsidiary of the Harvard Club of Australia (HCA). HCAP operates leadership programs and acts as joint corporate trustee for the HCA

Foundation. This subsidiary was originally established to avoid any financial risk to the Harvard Club of Australia Inc. from operating leadership programs. It has grown to be classified by the ACNC as a medium sized Australian charitable entity. HCAP is a tax-exempt entity, which supports our private ancillary fund - The Harvard Club of Australia Foundation. HCA and HCAP support six scholarship programs to enable transformational educational experiences for Australians. These programs are funded through the generosity of members; from the surplus on our annual Program for Leaders; and from the earnings of endowment funds.

Impact of Global Pandemic

The Global pandemic has had a profound impact on the operations of HCA Philanthropy.

- We are unable to offer public access Professional Development programs until there is no risk of disruption to local and international travel, and visiting Academics are not required to spend 2 weeks in quarantine.
- We have suffered financially by not having the income from our very profitable Program for Leaders, and have had to absorb \$105,000 set up costs of the cancelled 2020 Program for Leaders.
- We have halted selection of Australia Harvard Fellowships, and Wolfensohn Scholars. We have however selected R.G. Menzies scholars who typically spend one or more years at Harvard, and have continued awards for Non Profit Fellowships. The Public Education Foundation has continued selection of School Principals to attend a short Program at the Harvard Graduate school of Education.
- Winners of the 2019 Australia Harvard Fellowships have been unable to take up their fellowships, not being able to travel to Australia or Boston.
- Donation income has greatly reduced.

The pandemic has reinforced our view that we should only support “face to face” programs at Harvard with our scholarships, so as to give the recipients the benefit of interacting with great teachers, and peers from around the world.

Happily, our two endowment funds continue to provide income to support the R.G. Menzies Scholarship, and funding to maintain Australian Harvard Fellowships, and Public Education Foundation Principals Scholarship.

We have become more conscious of the need to diversify our funding sources, with primary focus on engaging charitable foundations interested in supporting Australians to gain a Harvard experience.

Independently of the Pandemic, our club patron James Wolfensohn has died causing uncertainty as to future funding for the Wolfensohn Public Sector Scholarships.

Ten year retrospective

I celebrated 10 years as Chairman of HCA Philanthropy in May 2021. The highlights of those ten years are:

In 2014 Melinda took on operation and leadership of the Program for Leaders from Clive Gard. This program was established in the Presidency of Mike Quinn who should be proud of what it has produced. Since 2014 it has produced at least \$1 million in profit contribution for scholarships. This year Melinda has kept momentum with three MasterClasses that have

attracted an average of 80 paid subscribers making a worthwhile contribution of at least \$10,000 to Club finances in a challenging year.

We have supported the addition of two scholarships (i) supporting the Public Education Foundation Principals scholarships and (ii) The Wolfensohn Public Sector Scholarships.

We have successfully awarded 42 AHF fellowships (\$A700,000), 20 R.G. Menzies Scholarships (\$US 1.2 million), 55 Principal Centre Scholarships (\$A300,000), 21 Wolfensohn Scholarships (\$US 400,000) and 10 PEF Principal Scholarships (\$A150,000).

We initiated the Principals Centre in Australia based on the success of the PEF Principals Scholarships with a Net Promoter Score of +88, and sent \$US450,000 to Harvard from this initiative, along with \$65,000 GST to the ATO. The Graduate School of Education is keen to return as soon as possible.

We have enthusiastic volunteer selectors working with P/L's in each of our six scholarship programs.

We have raised about \$1 million in donations from members and others to support these initiatives.

Our endowment funds have grown and now produce recurring income of about \$A150,000. The R.G. Menzies Fund has grown from \$1.3 million in 2012 to \$2.5 million today. HCA Foundation has grown from \$1.2 million in 2014 to \$1.7 million today. During this period these funds have distributed at least \$1.5 million to support scholarships.

We don't spend money on overheads. The money entrusted to us is spent on the cause of transformational educational experiences for outstanding Australians. Every dollar donated is spent on this cause. We operate at low cost, noting that Melinda is appropriately compensated for her role, and I remain an unpaid volunteer, and regularly give money to the cause.

Recognition of sustained service

There are many volunteers who contribute to fundraising and scholarship programs, including serving on selection panels. I specifically acknowledge and thank the following volunteers for their sustained support over a long period:

- John Turner 16 years of service to Australia-Harvard Fellowships.
- Galina Kaseko 5 years of service as Program Leader Australian- Harvard Fellowships.
- Mathew Vadas 5 years service as Chair of Selectors Australian-Harvard Fellowships.
- Sue Morey more than 10 years service as selector Australia-Harvard Fellowships.
- Jon Chambers 5 years of service as Program Leader of R.G. Menzies Scholarship program.
- Lisa George 5 years of service as Leader of Non Profit Fellowships.
- Ricky Campbell-Allen 5 years of service as selector and Program Leader for Public Education Foundation Principals scholarship program.
- Luke Woodward 5 years service as Program Leader for Wolfensohn Scholarship Program
- Melinda Muth 10 years service as Director of HCA Philanthropy and Program Leader of Program for Leaders and Non Profit Workshop.

I also acknowledge Justina Blackman, our Club Administrator for her unfailing good cheer, and commitment to support all our Club and Philanthropic activities.

Our Professional Leadership Programs

In the past year our successful Professional Development Programs have been deferred due to the impact of the Global Pandemic. The Principals Centre in Australia was successfully staged in Sydney in January 2020. The scheduled Program for Leaders and Non Profit Workshop were deferred and deposit payments returned to those who had booked.

Program for Business Leaders

The 2020 Program for Leaders has been further deferred to July 2022 as a result of the Corona Virus Public Health measures. There is a community hunger to get back to “face to face” events and away from video conferencing. We anticipate the proposed 2022 Program for Leaders will be well supported. We are attempting to design a “face to face” program at the RACV Country Club, Healesville in July 2022 with Harvard Professors attending by video link, and supported by Australian facilitators, and panelists.

Expenses were incurred in the marketing of the 2020 Program for Leaders. These amount to about \$105,000 which are reported as a loss in the 2020 financial year. RACV refunded \$27,500 of our accommodation deposits and has agreed to roll forward \$27,500 of accommodation deposits. The directors consider that there remains some doubt as to whether these deposits can be utilised within the terms of the RACV extension, and have therefore decided to fully expense this deposit in the 2020 financial statements.

We are maintaining connection with prospective and past attendees by offering a series of Masterclasses with Harvard Professors. These have been very well supported.

Program for Non-Profit Leaders

The 2020 Non Profit Workshop was deferred as a result of the Corona Virus Public Health measures. This is most disappointing as it was selling well. We anticipate the next workshop will be taught at the RACV Country Club, Healesville in July 2023.

We acknowledge the ongoing support of Melinda Muth MBA '81, Program Director for the Programs for Leaders, and Anita Pike at Streamwise Learning who provides administrative support for both Programs.

Principals Centre in Australia – Leadership for School Excellence

The inaugural Principals Centre in Australia was held at the Abercrombie Building, Sydney University Business School from January 12th to 16th 2020. This program was highly successful due to the investment made by the club over the prior seven years in supporting the Public Education Foundation in awarding scholarships for Australian Principals to attend a similar week-long course in Boston. This gave a strong reference base for “principal to principal” promotion and club member promotion. Often a friendly tap on the shoulder “*you can do this!*” was key to encouraging applicants.



Harvard Club Scholarship winners at the inaugural Principals Centre in Australia

Course pedagogy

Four Harvard Graduate School of Education (GSE) faculty taught 171 Australian and New Zealand School Principals “*Leadership for School Excellence*”. The enrolment exceeded our target of 150 participants. Kay Merseth, Chair of Faculty, led her Professional team over four days through case studies and frameworks for planning using the best Harvard socratic

method. She was supported by Matthew Miller, Liz City and Karen Mapp. Matthew taught frameworks for planning using the four windows frame, along with a case study of Lithgow High School especially developed for the centre. Liz taught strategy development, and tools for high performing teamwork. Karen led the Principals through an understanding of the critical importance of parent and community engagement. Kay provided the context and road map through the program and taught passionately about the importance of the instructional core to ensure student understanding and engagement with content being taught.

Profile of participants

The 171 participants represented all Australian states and territories, and New Zealand. They also represented all school systems including government schools, catholic schools and independent schools. The Department of Education in South Australia paid for places for 32 Principals and 2 system leaders through their ORBIS centre for professional development. The Department of Education in New South Wales paid for 30 places through their Professional Development Institute. We thank these two systems for playing a cornerstone role in this inaugural program.

Generous donors, largely, but not exclusively, members of the Harvard Club of Australia, provided funding of \$390,000 to support scholarships for Principals from Government Schools in disadvantaged communities, and regional and remote areas of Australia, and two Principals from less advantaged schools in New Zealand. Winners of the scholarships came from the Northern Territory, North Queensland, remote parts of WA as well as other states. This provided remarkable geographic diversity as well as diversity of school size and type. The scholarship winners were provided with a \$4,000 contribution to the course fee, plus accommodation at St Pauls' College Graduate House, and a travelling allowance to get to the program.

Feedback from Participants

Participants were overwhelmingly positive about the program, and its influence on assisting them to be more effective leaders of their schools. They reported that the curriculum was very relevant to their needs as leaders of schools, and that it provided them with tools and techniques to develop their skills as leaders. They expressed strong advocacy for the Program and their willingness to strongly encourage peer principals to attend future programs.

Participants were asked to complete an evaluation of the course. 128 (75%) responded including some statistical analysis and "verbatim". The table below incorporates some, but not all of the statistical feedback:

Question	Maximum Score	Mean Score	Standard Deviation
Program Objectives:			
1. Gain Deeper Understanding of Leadership Skills needed to set high expectations for Instructional Quality	5	4.73	0.53
2. Become a more effective school leader	5	4.73	0.5

3. Develop a leadership Strategy informed by data and learn how to align resources and initiatives around an evidence based approach	5	4.42	0.77
4. Foster student achievement by increased engagement with families, community and school leaders	5	4.73	0.54
Overall Quality of the Program:	5	4.88	0.35
Relevance of the Program to your professional learning needs	5	4.85	0.4
Integration of the elements of your learning experience	5	4.72	0.51
Opportunities to engage with the community of learners	5	4.78	0.5
Value of the Program	5	4.88	0.39
Balance of Theory and Practice	5	4.78	0.53
How satisfied were you with the overall program?	7	6.88	0.40

We consider this a remarkable result for a first-time program. There is feedback on certain aspects we can improve for the next program, including that it be run over five days, not four. A taste of some of the comments is:

“The most professionally inspiring and enriching professional learning I have participated in in 31 years in Education. The content was cohesive and presented in an intuitive way. The quality of the presenters as teachers and academics was second to none. Thank you for the opportunity. My school and staff I work with are already benefiting from the opportunity.”

“Participation in the *Leadership for School Excellence* course has strengthened my understanding of what is required to be a successful school leader. I have acquired a toolkit of evidence based strategies that I can utilise to lead school improvement and that will ultimately secure school excellence”.

“I would highly recommend this course to leaders as a way of raising the bar for the work that we do”

GSE and HCAP roles

The Graduate School of Education was responsible for the application and admissions process, marketing, course design, course content, cases, key account liaison and on site direction. Cate Gardner, was Program Director reporting to Stephen Hyde, Director of Professional Education at GSE. Cate was supported by Julia Pasquale in Sydney. The financial surplus of \$US450,000 arising from the program was remitted to GSE.

HCA Philanthropy acted as invoicing agent, so as to remit GST to the Australian Tax office. Total revenue from the Program amounted to \$770,000, which resulted in a net payment of

GST after input credits of \$64,000. Chris Smith MBA '77 led the initiative and assembled a local sales and operations team to deliver a very high quality experience for the Principals. Our objective was to “put the Principals on a pedestal” in keeping with the concept expressed by David Gonski at the 2012 AGM of the Club.

Ricky Campbell-Allen EdM'10 energetically engaged with curriculum design and led the push for enrolments. Chris and Ricky were supported by club administrator Justina Blackman, Gabi Kelland as Program logistics manager, Ian Hill as Site operations manager. Melinda Muth MBA '79 kept a watchful eye on proceedings sharing her considerable skill and experience of five years directing our Program for Leaders. She also assisted in successfully selling places into the Catholic School System.

HCAP arranged accommodation at St Pauls' College Graduate House which was very favourably commented upon by participants, in keeping with our objective of giving the Principals a first class experience. Our thanks to Kate Bowery, General Manager of St Pauls' College Events and Stays for managing the complexity of this inaugural Program.

Donors and Charitable partners

Donors were key to success providing funding to ensure economic viability. Donations needed to be channeled through Deductible Gift Recipient charitable partners. These partners also provided very valuable promotional support through their school contact networks.

We acknowledge the Roth Family Yarranabbe Foundation making a further donation of \$20,000 in 2020 to Australian Business and Community Network for the next Program.

We are carrying forward \$58,502 in donations for future Principals Programs in Australia, along with \$40,000 held by HCA Foundation, \$25,000 held by Aurora Indigenous Educational Foundation and \$20,000 held by Australian Business Community Network.

Future Principal Centre's in Australia

Our longer-term vision is to stage this program every year giving the opportunity to the 10,000 Principals in Australia and 2,500 in New Zealand. We also seek to have delegates from the Asia Pacific region to give participants the opportunity to learn from other school system leaders. Please engage with school principals that you know to spread the word.

Harvard Graduate School of Education are enthusiastic to return to Australia when our border is open.

Donations from Members

We rely to a significant extent on the goodwill and support of members passionate about offering a Harvard experience to Australians. There are broadly four groups of donors who support us:

- Members making a donation with their annual subscription.
- R.G. Menzies scholarship winners giving back so that others may benefit from the same Harvard experience they enjoyed. We campaign every year for funds from this group.
- Annual class giving by members.
- Private Foundations, whether associated with members or otherwise, who are required to distribute 5% of their funds each year, and wish to specifically support one of our scholarships.

Additionally, we hope that members will think of their Harvard education as they are making or amending their will.

There is a table at the end of this report that specifically acknowledges donors. Thank you to all donors who supported us in 2020. \$18,000 was donated to the R.G. Menzies Scholarship endowment at ANU, \$20,000 was donated for future Principals Centre in Australia, and Club members donated \$1,350 to the Harvard Club of Australia Foundation. Members donated \$1,795 to the club in small donations during the year (prior year \$2,777). This will be forwarded to the Harvard Club of Australia Foundation. Please consider a donation when you renew your membership.

Australian donors are able to claim a tax deduction for donations to the Harvard Club of Australia Foundation, managed by Perpetual Trustees, and also for donations to the R.G. Menzies Scholarship fund at the Australian National University. This latter fund has a Deductible Gift Recipient item 1 approval, enabling ANU to accept donations from Private ancillary funds and foundations. HBS alumni in Australia can get class and section recognition in the HBS Contributors report for donations made in Australia to HCAF and ANU. Importantly, this is the only way to make an Australian tax deductible donation for your HBS reunion gift. Alumni in the US can donate tax effectively to the R.G. Menzies Fund at Harvard University.

Please consider donating in support of our scholarship and professional development programs. When you are next updating your will, please consider a bequest.

Earnings from Endowment Funds

The Club scholarship programs benefit from three endowment funds: The R.G. Menzies Scholarship Fund at ANU, a smaller, but similar fund for postgraduate study managed by Harvard in the US, and the Harvard Club of Australia Foundation – a Private Ancillary Fund. These endowment funds also provide the opportunity to maintain distributions for Scholarships in periods when there is no income from Programs, as was the case in 2020 and will be in 2021.

As at December 31st 2020 The ANU endowment capital was \$2.017 million (last year \$2.024 million) in the R.G. Menzies general fund, and \$491,000 (Last Year \$478,000) in the MBA specific fund. We aspire to build the MBA fund towards \$1 million before awarding scholarships from this fund. Annual distributable earnings are about \$A80,000 (4%) in the general fund. The capital value of the investment pool did not grow in 2020 after a long period of growth between 4 and 6%.

The value of the R.G. Menzies Scholarships remain at \$US60,000. The R.G. Menzies Scholarship endowment at Harvard produces \$US 46,000 annual contribution to the tuition fees for full time study by R.G. Menzies Scholars selected in Australia, and the balance is funded by the ANU endowment.

There is a gap between the value of scholarships awarded each year by ANU and donations received and income being generated. The Harvard Club of Australia Foundation has made donations to the R.G. Menzies fund to fill this gap until the capital sum grows to sustain two scholarships each year. These donations were \$30,000 in 2020 and \$30,000 in 2019. We have also discussed awarding 3 scholarships every two years as a way of living within our means. To date this has not been necessary. Sufficient funding is available for two scholarships in 2021.

The HCA Foundation has an endowment balance of \$1,601,192 on 31st December 2020. (\$1,689,721 on December 31st 2019). Investment returns for the year to December 2020 were \$83,300 income return (5% on average balance) and -5% capital growth. HCA Philanthropy

P/L is Joint Trustee with Perpetual Trustees Limited and is represented by Christopher Smith MBA '77, Matt Loughnan GMP '16 and David Jones MBA '92. Donations distributed during 2020 amounted to \$78,000 (Prior year \$308,000). Donations received during 2020 amounted to \$6,771 (Prior year \$504,000 of which \$396,000 from HCA Philanthropy). Significant donors are acknowledged in the list of donors at the back of this report. Thank you donors!

Our Scholarships

Giving Back through a range of scholarships has been a core purpose of the Club since 1968 when the Club initiated the R.G. Menzies Scholarship Program. The Australia Harvard Fellowship Program was initiated in 2004 to bring Harvard Researchers to Australia and live up to the original wish of Sir Robert Menzies that the scholarship in his name would foster two way exchange with Harvard.

In 2001 we added the non Profit Fellowship, and in more recent years the Public Education Foundation Principals Scholarship, the Wolfensohn Scholarships and an Indigenous Education Scholarship with the Roberta Sykes Indigenous Education Foundation.

Club members can apply for the Clive Gard Scholarship which gives a free seat at the annual Program for Leaders worth over \$10,000. Members can also volunteer to join selection panels for each of our Scholarships or to take a turn at leading a Scholarship Program.

Aggregate Income for Scholarships

In 2020 the aggregate net receipts generated from various sources to support our Scholarships and Fellowships amounted to \$121,000. This is significantly lower than in 2019 which benefited from significant donations for the Principals Centre in Australia.

2021 Harvard Club R.G. Menzies Scholarships

The R.G. Menzies Scholarship is the flagship scholarship program of The Harvard Club of Australia and now marks its 53rd year. Initiated by James Wolfensohn KBE AO in 1968, the program has grown steadily in all respects and is recognized as one of the most prestigious post-graduate scholarships in Australia, offering two scholarships at \$US60,000 each. Since inception, the Harvard Club of Australia has supported ninety young men and women with scholarship funding to Harvard. Candidates are reviewed around the overarching objective of their potential to make a significant contribution to Australia and in this context, are then considered under the headings of leadership, intellectual ability and breadth of vision.

The scholarship selection process is carried out jointly with the Australian National University and we each provide three selectors. A seventh selector has historically been included representing the Menzies Foundation, so long as they provide financial support for the program.

Alexandra West (R.G. Menzies Scholar 2002) and Nayana Vootakuru (R.G. Menzies Scholar 2010) have become R.G. Menzies Program Leaders and selectors. We thank Jon Chambers OPM '91 for his service over five years as Program Leader for the R.G. Menzies Scholarship program. David Niall representing the Harvard Club of Victoria is the third member of the selection panel. The Chair of the selection committee was Dr Suiwah Leung (Crawford School of Government), she was joined by Professor Glen Withers (Research School of Economics – and a Menzies Scholar – 1970) and Professor David Hambly (ANU College of Law)

This year the Covid-19 shut down prevented the normal flow of activities and presented some logistical challenges which were well managed by the ANU. We thank Suiwah Leung and Lindsay Burrows (ANU scholarship administration) for their efforts in these circumstances.

The 2021 selection round for the RG Menzies scholarship has concluded with another two outstanding Australians succeeding amongst a group of extremely talented candidates. There were forty-nine applications. Applications were reviewed to a short list of sixteen. This short-list was reviewed by the selectors and a final group of six were invited for formal interviews in early April.

This year's winners are Paige Taylor and Dr Helena Franco. You will see from reading their profiles that they are worthy recipients of our scholarship by meeting the requirements of leadership, intellectual ability and breadth of vision and consequently have the capacity to be significant contributors to Australia.

Ms Paige Taylor



Paige currently works as a management consultant at McKinsey & Company and will be studying the Masters in Public Administration in International Development at the Harvard Kennedy School.

Paige is passionate about the role of education and health policy in human development and poverty reduction, in particular the importance of early childhood interventions in addressing intergenerational inequality.

Paige's interest in economics and policy was sparked by her undergraduate degree in Economics at the University of Sydney, where she graduated with First Class Honours and the University Medal. In her Honours year, Paige researched the impact of alcohol restrictions on children's health and education outcomes in the Northern Territory. This experience, as well as her work at McKinsey, highlighted the complexity of successfully implementing policy on the ground. Paige believes her skills are best used at the intersection of academia and policy, by working to translate research into positive results. She intends to use her time at Harvard Kennedy School to deepen her expertise in economics and econometrics with a strong practical emphasis.

Paige joined McKinsey & Company following graduation, where she has focused on strategy work across the public sector, healthcare and telecommunications. Paige currently volunteers as a mentor with employment non-profit enterprises to help migrants and young people find work in regional Australia. Paige grew up on a family farm in the Snowy Mountains and enjoys spending time there with her family and skiing nearby in the winter. Paige is a keen runner

and a regular participant in the City2Surf as well as various half and full marathons in Sydney and Melbourne. She loves learning languages, having received scholarships to study in Germany both at school and university, and is currently learning Spanish albeit at a slower than usual pace.

After graduating from the MPA/ID program, Paige intends to work with an international development institution focused on human capital development to reduce inequality. Paige aspires to bring this experience back to Australia by working with government and not-for-profits on programs to reduce inequality in both the domestic and foreign policy arenas.

Dr Helena Franco



Helena Franco is Orthopaedic Principal House Officer from Queensland and will be undertaking a Master of Medical Sciences in Global Health Delivery at the Harvard Medical School. Helena will be the first recipient of the Menzies Scholarship to undertake graduate studies at Harvard Medical School.

Helena obtained her Bachelor of Medical Studies/Doctor of Medicine from Bond University in 2017. She was subsequently awarded the Bond University Young Alumni Award in 2018 in

recognition of her leadership, commitment and research in medicine. She was the first Health Sciences and Faculty graduate to receive this prestigious Bond University Award. Helena's academic and international curiosity led her to complete overseas surgical electives at Yale University and Cambridge University, and subsequently, selection for the 2019 Harvard-MIT Healthcare Innovation Bootcamp.

Throughout her career, Helena has become a leader within the field of Global Surgery. She served as the Vice Chair of the International Student Surgical Network (InciSioN), an international, non-for-profit organisation conducting advocacy and research within the field of global surgery, representing over 5,000 members in more than 75 countries. As a delegate of the 2019 World Health Assembly, Helena attended the Essential Surgical Care Programme Technical Meeting which included discussions on the creation of national surgical, obstetric and anaesthesia plans.

Since graduating, Helena has been involved in clinical research within the field of surgery and global health, having presented at national and international conferences. She currently serves on the organising committee for the Global PaedSurg project, a multi-centre international research collaboration studying congenital abnormalities. She was an invited keynote speaker at the International Surgical Students' Conference in 2019, addressing the ways in which medical students and junior doctors can contribute to global equity in surgery.

Outside of her clinical and research career, Helena has a long-standing interest in debating, and her University's highest scoring debater at the Australasian Intervarsity Debating Championships. Her personal and professional success was recognised in her nomination for Young Australian of the Year in 2019.

Helena aspires to work as an orthopaedic surgeon upon her return to Australia. She intends to use the knowledge acquired during her studies at Harvard Medical School to continue her advocacy for improved surgical equity at a national and international level, and to strive for surgical innovation to enhance access in under-resourced communities.

2019 Australia- Harvard Fellowships

The Australia Harvard Fellowships were established in 2004 under the leadership of John Turner AMP'86, with the aim of encouraging knowledge exchange between Harvard University and Australian Universities and Research Institutes. This intent is consistent with the origins of our R.G. Menzies scholarship program which envisaged Harvard academics visiting Australia, as well as offering post graduate study at Harvard. This program has been chaired by Professor Mathew Vadas AO MBBS'70 of the Centenary Institute, and Dr. Galina Kaseko GMP'12 of the Stephen Sanig Research Institute, as Program Leader. Prof. Bob Graham AO is taking on the role of Chair of selectors from 2020 onwards. Since Inception \$1,228,000 has been awarded to 74 Fellowship recipients. This program is highly regarded in life science research circles and has resulted in several substantial National Health and Medical Research Grants, and two Professors migrating to Australia for lengthy periods of research at Australian Medical Research Institutes, and acknowledgement of Hala Zreiqat as Woman of the year in NSW in 2018.

The Pandemic has prevented the funded 2019 exchanges, and any near term scholarship selections in 2020 and 2021. There is a commitment for fellowships awarded in 2019 that have not yet occurred to Professor Karol Miller (UWA), Associate Professor Yu Shrike Zhang

(HMS), Associate Professor Yang (Ted) Teng (HMS) and Professor Joyce Bishoff (HMS) amounting to \$49,500.

2020 Ferris Family Fellowship Program for Non Profit Leaders

The Non-Profit Fellowships were established in 2001 to bring enhanced leadership skills to the Australian non-profit sector; enable leaders to examine their mission, develop new strategies and improve the effectiveness of their organisation; and benefit the Australian community generally.

The Non-Profit Fellowships are funded by Bill and Lea Ferris. They enable two Fellows selected from the non-profit sector Australia-wide to attend the renowned Harvard Business School course titled “Strategic Perspectives in Non-profit Management” (SPNM) which is held each year in July.

Nominees must be the head of a non-profit organisation who has the potential to have a significant impact in the non-profit sector, and who meets various additional criteria.

Applicants may be nominated by an HCA member, a past Non-Profit Fellow or the Chairman of their organisation. Applicants may also self-nominate but must nominate a referee.

The Program Leader is Past President Lisa George. We thank Lisa and her selection panel, Anita Kumar, Tony Massaro, Patrick Regan, and Ben Sebel who selected the winners. The Australian Scholarships Foundation assisted in the administration of applications.

The awards for 2021 were presented at the annual Non-Profit Lunch on May 17th, 2021, hosted by Macquarie Bank, and presented by Daniel Petre, AO. At this lunch Bill and Lea Ferris expressed their ongoing support for these fellowships and announced an increase in available funding.

The winners for 2021 are Professor Kristy Muir, CEO of the Centre for Social Impact and Heidi Limareff, Group Chief Executive, Can:Do Group.



Lisa George Program Leader Ferris Family Not for Profit Fellowship with Kristy Muir and Heidi Limareff

Professor Kristy Muir

Professor Muir is the CEO of the Centre for Social Impact (CSI) and a Professor of Social Policy in the Business School at UNSW. She is an elected member of the UNSW Council, Chair of Allan & Gill Gray Philanthropy Australasia, Non Executive Director of the Australian Research Alliance for Children and Youth, Chair of ARACY's Audit and Risk Committee, Non-Executive Director of the Community Council for Australia and a member of the NSW Premier's Council on Homelessness.

Kristy is driven to better understand and find solutions to complex social problems and measure whether and where we are making a difference. Her research spans housing, education, employment, social participation, disability, mental health, financial resilience and well being.

The Leadership challenge that Kristy will be taking to her program at Harvard is how to undergo significant growth while ensuring transformative impact and maintaining our culture.

Heidi Limareff

Heidi is the Group Chief Executive of the Can:Do Group, and organisation comprised of South Australia's two oldest disability service providers: Can:do 4Kids and deaf Can:Do.

Heidi is director of the Adelaide Holocaust Museum and Andrew Steiner Education Centre. Heidi holds a Master's degree in Communication Disorders and a Master of Business Administration.

The Leadership challenge that Heidi will be taking to her program at Harvard is how to create the vision to make a more unified Can:Do Group in order to get greater social impact and revenue growth.

2019 Sir James Wolfensohn Public Service Scholarships

The Sir James Wolfensohn Public Service scholarship was established in 2012 with the financial support of the former chairman of the World Bank; Patron and Past President of the Harvard Club of Australia, Sir James Wolfensohn. It was established to promote the development and delivery of good public policy. There have been 25 scholars to date. Each of the winners has been chosen on the basis of their potential to contribute to the benefit of Australian society. Many of the previous scholars have advanced in their careers to senior roles in State and Federal government.

Travel constraints prevented any scholarships being awarded in 2020.

2021 HCA Education Scholarships

David Gonski, the guest speaker at our 2012 AGM, challenged us to "put principals on a pedestal". As a consequence of this challenge, former HCA President, Patrick Regan EdM'06, initiated this transformative scholarship program to send outstanding public school principals from around Australia to the Harvard School of Education to undertake a week long professional leadership development program.

The Public Education Foundation, and Teachers Mutual Bank along with our support, has subsequently enabled 23 Australian public school principals to attend these professional development courses at the Harvard Graduate School of Education.

These Scholarships have developed a high profile in the education sector. The Principals Program taught at Harvard has a high level of participation by Australian principals which has encouraged Harvard GSE to offer their first course outside the USA.

Since 2016, our involvement in the HCA Education Scholarship has been managed by Ricky Campbell-Allen EDM'10. Scholarships are awarded to early to mid-career principals who demonstrate significant leadership impact in their school and a commitment to public education.

The 2021 Public Education Foundation Scholarships to Harvard were won by;

- **Jenny Boyall** - Katoomba High School (NSW), Harvard Club of Australia Principal's Scholarship
- **Damien Keel** - Yarrowonga College P-12 (VIC), Teachers Mutual Bank Principals Scholarship
- **Catherine O'Dea** - Christies Beach Primary School (SA), Public Education Foundation Principal Scholarship

Each Principals Scholarship is valued at approximately \$16,000 and includes program tuition for one of two prestigious Harvard Graduate School of Education programs: Improving Schools: The Art of Leadership or Leadership: An Evolving Vision.

Supporting Indigenous Education

The Harvard Club has a long history of supporting Indigenous scholars including Noel “Bilyana” Blomeley, a 1992 R.G. Menzies Scholar who completed an EdM at Harvard, Selwyn Button a 2017 Wolfensohn scholar is now Registrar of Aboriginal and Torres Strait Islander Corporations. In 2019 Jason Ardler, deputy Secretary, and Head of Aboriginal Affairs in the NSW Government was one of the Wolfensohn Scholars.

We have changed the focus of our Indigenous scholarship to support the Principals Centre in Australia. This is in recognition of the pivotal role played by Principals in transforming the lives of students and their communities. Roberta Sykes Indigenous Education Foundation, managed by Aurora Indigenous Education Foundation, has until now focussed on overseas postgraduate study opportunities for indigenous Australians. The small pool of indigenous students qualified for overseas study opportunities has caused Aurora to work on the need to improve the aspiration of indigenous students all the way from primary school, through high school, into university and subsequently into post-graduate study.

HCA Foundation donated \$40,000 in 2019 to Aurora, to support scholarships to Indigenous Principals, and to Principals in schools with significant indigenous enrolment. Aurora funded 3 scholarships in January 2020 amounting to \$14,700 excluding travel and accommodation costs. We envisage residual funds held by Aurora to be committed to the next Principals Centre in Australia.

Clive Gard Scholarship

The Clive Gard Scholarship is named in honour of our long time Club Administrator who was instrumental in successfully operating our Program for Leaders until 2014, contributing several million dollars to the endowment funds for our scholarship programs. The scholarship is available to club members, in mid-career, to attend the HCA Program for Leaders. The winner is selected by the Club President and executive in June each year. 10 members have benefited from this scholarship, and others have been offered a discounted place.

There was no award in 2020. The 2019 winner was Andrew Hahn who completed his Advanced Management Development Program at the Harvard Graduate School of Design in 2018.

This scholarship is a valuable benefit of membership and is a strong reason to maintain your membership of HCA.

Harvard Club of Australia Inc.

Income Statement

For the period 1 Jan 2020 to 31 Dec 2020

	2019	2020
	\$	\$
Revenue		
Events Income	41,432	20,369
Subscriptions	41,334	38,500
Total Revenue	82,766	58,869
Expenses		
Cost of events	28,512	13,995
Administration	47,222	50,112
Insurance	1,444	1,132
Bank charges and merchant fees	1,366	1,060
Printing, postage and web services	6,526	2,380
Total Expenses incurred in earning income	85,071	68,679
Surplus/(Deficit) before financing income	(2,305)	(9,810)
Interest income	278	69
Donation to the Harvard CA Foundation	(278)	(69)
Net Finance income	0	0
Net Surplus/(Deficit) for the period	(2,305)	(9,810)

In the opinion of the Council members of the Harvard Club of Australia Inc. ("The Association"):

- (a) The Association is not a reporting entity
- (b) The financial statements are drawn up in accordance with the applicable Australian Accounting Standards and other mandatory reporting requirements, so as to represent fairly the financial position of the entity as at 31 December 2020, and its performance as represented by the results of its operations and its cash flows for the financial year ended on that date; and
- (c) There are reasonable grounds to believe that the Association will be able to pay its debts as and when they become due and payable.

Signed on behalf of the Council: *Matthew Loughnan* (Treasurer)
Dated at Sydney on the 2 June, 2021.

Harvard Club of Australia Inc.

Balance Sheet

as at 31 December 2020	2019	2020
	\$	\$
Assets		
Cash and cash equivalents at cost	109,059	86,341
Trade and other receivables	<u>0</u>	<u>0</u>
Total current assets	109,059	86,341
Investment in subsidiary	<u>1</u>	<u>1</u>
Total non-current assets	<u>1</u>	<u>1</u>
Total Assets	<u>109,060</u>	<u>86,342</u>
Liabilities		
Trade and other payables	0	0
Subscriptions received in advance	28,809	20,808
Amounts due to Harvard Club of Australia Foundation	<u>6,772</u>	<u>1,864</u>
Total current liabilities	<u>35,580</u>	<u>22,672</u>
Total liabilities	<u>35,580</u>	<u>22,672</u>
Net assets	<u>73,480</u>	<u>63,670</u>
Accumulated funds		
Balance brought forward	75,785	73,480
Net Surplus/(Deficit) for the year	<u>(2,305)</u>	<u>(9,810)</u>
Total accumulated funds	<u>73,480</u>	<u>63,670</u>

Notes to and forming part of the financial statements

Significant Accounting Policies

This report is a "Special Purpose Financial Report" that has been prepared to satisfy the financial reporting requirements of the Council, members of the club and the *Associations Incorporation Act NSW 2009*.

The financial report has been prepared on an accrual basis; it provides for subscriptions received in advance.

The financial report is based on historic costs and does not take into account changing money values or current valuations of non-current assets.

**INDEPENDENT AUDIT REPORT
HARVARD CLUB OF AUSTRALIA INC.
A.B.N. 70 814 606 610**

Report on the balance sheet

We have audited the balance sheet, being a special purpose financial report of Harvard Club of Australia Inc. (the association), as of 31 December 2020.

Committee members' Responsibility for the Financial Report

The Committee members of the association are responsible for the preparation of the financial report and have determined that the basis of preparation described in Note 1 is appropriate to meet the requirements of the *Associations Incorporations Act NSW 2009* and is appropriate to meet the needs of members. This Committee's responsibility also includes such internal control as the Committee determines is necessary to enable the preparation of a financial report that is free from material misstatement whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on the balance sheet based on our audit. We conducted our audit in accordance with Australian Auditing Standards. These Auditing Standards require that we comply with relevant ethical requirements relating to audit engagements and plan and perform the audit to obtain reasonable assurance whether the balance sheet is free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the balance sheet. The procedures selected depend on the auditor's judgement, including the assessment of the risks of material misstatement of the balance sheet, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the balance sheet in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by the committee, as well as evaluating the overall presentation of the balance sheet.



We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Independence

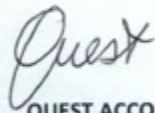
In conducting our audit, we have complied with the independence requirements of Australian professional ethical pronouncements.

Basis of Accounting and Restriction on Distribution

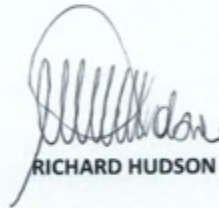
Without modifying our opinion, I draw attention Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared to assist the association to meet the requirements of the *Associations Incorporations Act NSW 2009*. As a result, the financial report may not be suitable for another purpose.

Auditor's Opinion

In our opinion, the balance sheet presents fairly, in all material respects the financial position of Harvard Club of Australia Inc. as at 31 December 2020 in accordance with the accounting policies described in Note 1 to the financial statements, and the *Associations Incorporations Act NSW 2009*.



QUEST ACCOUNTANTS PTY LTD



RICHARD HUDSON

Sydney, dated this 2nd of June, 2021.

Formal Directors Report HCA Philanthropy Pty Limited

The Directors of HCA Philanthropy Pty Limited herewith submit the annual financial report for the financial year ended 31st December 2020.

Principal Activities

The principal activity of the company in the course of the financial year was to operate Executive Leadership Programs taught by Harvard professors with the objectives of bringing Harvard quality leadership development to Australia, promoting the Harvard Brand in Australia and to make a profit to benefit Scholarship and Fellowship programs of the Harvard Club of Australia. HCA Philanthropy is also a joint corporate trustee for the Harvard Club of Australia Foundation along with Perpetual Trustees Limited.

Review of Operations

The 2020 Program for Leaders and Non Profit workshop were cancelled after incurring unrecovered expenditure on venue deposits, advertising and project management. The company reported a deficit of \$143,053 in 2020 as a result of these expenditures and \$65,667 expenditure for Wolfensohn scholars attending programs at Harvard Kennedy School of Government. The Company also acted as agent for the Harvard Graduate School of Education Principals Centre in Australia which had revenue of \$770,000, and incurred local costs of \$120,000. The surplus of \$US450,000 was remitted to GSE during the year.

The company held US dollar balances at balance date for future US dollar expenditure on professor fees and scholarships. An adverse foreign exchange valuation adjustment of \$8,316 was reported as a result of year end exchange rates on these US dollar balances being higher than the cost of these funds.

Changes in state of affairs

The company sponsored the establishment of a professional development program for school principals during the year. This program was successfully held between January 11th and 15th 2020.

Subsequent events

There has not been any change in the state of affairs of the Company since the end of the financial year and the date of this report.

Directors and Remuneration

Christopher Smith MBA'77 (Chairman)

Melinda Muth MBA'81 (Secretary)

Charles Graham MBA'01 (Retired 24 June 2020)

Elizabeth Carr AM MP/MC'04 (Appointed 24 June 2020)

Jon Chambers OPM'91

Kimberly Everett MUP'98

Justin Greiner MBA'00

Matthew Loughnan, GMP '16

With the exception of Melinda Muth, the directors are not remunerated. Melinda Muth's service company received a fee of \$18,000 to market the 2020 Program for Leaders. (2019 \$35,000)

Attendance at Board meetings

The directors held 3 meetings during the year, including one by circular resolution:

	Meetings eligible to attend	Attended
Chris Smith	3	3
Melinda Muth	3	3

Elizabeth Carr AM	1	1
Charles Graham	2	2
Jon Chambers	3	3
Matthew Loughnan	3	3
Justin Grenier	3	1
Kimberly Everett	3	3

Parent entity

Financial statements for HCA Philanthropy Pty Limited are provided in this annual report.

Auditor

Quest CA were appointed as auditors in December 2012. They continue in office as auditor.

Notes to and forming part of the financial statements

NOTE 1: SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – Basis of Preparation

1. The financial statements have been prepared on an accrual basis of accounting.
2. The financial statements take into account changing money values and, where specifically stated, current valuations of non-current assets. The company holds US\$ deposits as a hedge against future US dollar liabilities including scholarships and professor fees. Foreign exchange gains and losses are brought to account each year based on year end foreign exchange rates as reported by the ATO.
3. There is no GST adjustment in 2020.

HCA Philanthropy Pty Limited
Income Statement
For the year ended 31 December 2020

	2019	2020
	\$	\$
Revenue		
Leadership program	782,575	0
Non-profit leaders workshop	151,852	550
Other revenue including Masterclasses and Donations	25,656	12,040
Principals Centre in Australia	0	770,725
Total Revenue	960,083	783,315
Expenses		
Professors fees and travel expenses	307,071	604,865
Program delivery cost – Principals Centre in Australia	0	145,806
Program delivery cost – Program for Leaders	337,132	59,480
Marketing cost	19,326	459
Management fees paid to related party	35,000	18,229
Administration and audit cost	13,084	10,573
Insurance cost	767	5,740
Total expenses incurred in earning income	712,380	845,152
Net operating surplus (deficit)	247,703	(61,837)
Scholarship and fellowship expenditure		
Donation to HCA Foundation	(396,000)	0
Donation to R.G. Menzies Scholarship fund at ANU	(55,000)	0
Wolfensohn Scholarship	(36,767)	(65,667)
Donations received for Wolfensohn scholarship	40,988	0
Other expenditure in managing scholarships	(5,747)	(9,031)
Total scholarship and fellowship expenditure	(452,526)	(74,698)
Surplus (deficit) before financing income	(204,823)	(136,535)
Net interest income	3,508	1,798
Foreign Exchange (Loss) Gain	(10,469)	(8,316)
GST adjustment (see note)	0	0
Net finance income (deficit)	(7,140)	(6,518)
Net surplus (deficit) for the year	(211,963)	(143,053)

HCA Philanthropy Pty Limited

Balance Sheet

as at 31 December 2020

	2019	2020
	\$	\$
Assets		
Cash and cash equivalents at market	1,522,968	682,135
Trade and other receivables and accruals	2,100	20,960
Prepaid program expenditure	145,244	0
Total current assets	1,670,312	703,095
Total assets	1,670,312	703,095
Liabilities		
Trade and other payables	40,456	9,710
Refunds payable	0	143,419
Donations received not yet spent		58,502
Revenue received in advance of program delivery	995,340	0
Total current liabilities	1,035,796	211,631
Total liabilities	1,035,796	211,631
Net assets	634,517	491,464
Accumulated funds		
Share capital	1	1
Balance brought forward	846,479	634,516
Net surplus (deficit) for the year	(211,963)	(143,053)
Total accumulated funds	634,516	491,464

Responsible persons' declaration – per section 60.15 of the Australian Charities and Not-for-profits Commission Regulation 2013

The responsible persons declare that in the responsible persons' opinion:

- there are reasonable grounds to believe that the registered entity is able to pay all of its debts, as and when they become due and payable; and
- the financial statements and notes satisfy the requirements of the *Australian Charities and Not-for-profits Commission Act 2012*.

Signed in accordance with subsection 60.15(2) of the *Australian Charities and Not-for-profit Commission Regulation 2013*.

Matthew Loughnan

Matt Loughnan

Director

2nd June 2021



Christopher Smith

Director

**INDEPENDENT AUDIT REPORT
HCA PHILANTHROPY PTY LIMITED
A.B.N. 93 091 483 635**

Report on the Financial Report

We have audited the accompanying financial report, being a special purpose financial report of HCA Philanthropy Pty Limited (the company), which comprises the balance sheet as at 31 December 2020 and the income statement, statement of changes in equity and cash flow statement for the year ended on that date, a summary of significant accounting policies and other explanatory notes and the directors' declaration.

Board of Directors' Responsibility for the Financial Report

The Board of directors of the company are responsible for the preparation of the financial report and has determined that the basis of the preparation described in Note 1 is appropriate to meet the requirements of the *Corporations Act 2001* and is appropriate to meet the needs of members. The Board's responsibility also includes such internal control as the Board determines is necessary to enable the preparation of a financial report that is free from material misstatement whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on the financial report based on our audit. We conducted our audit in accordance with Australian Auditing Standards. These Auditing Standards require that we comply with relevant ethical requirements relating to audit engagements and plan and perform the audit to obtain reasonable assurance whether the financial report is free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial report. The procedures selected depend on the auditor's judgement, including the assessment of the risks of material misstatement of the financial report, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial report in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control.



An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by the directors, as well as evaluating the overall presentation of the financial report.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Independence

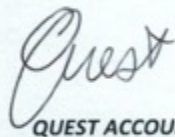
In conducting our audit, we have complied with the independence requirements of Australian professional ethical pronouncements.

Basis of Accounting and Restriction on Distribution

Without modifying our opinion, I draw attention to Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared to assist the company to meet the requirements of the *Corporations Act 2001*. As a result, the financial report may not be suitable for another purpose.

Auditor's Opinion

In our opinion, the financial report presents fairly, in all material respects, the financial report of HCA Philanthropy Pty Limited as of 31 December 2020 and of its financial performance and its cash flows for the year ended in accordance with accounting policies described in Note 1 to the financial statements, and the *Corporations Act 2001*.


QUEST ACCOUNTANTS PTY LTD


RICHARD HUDSON

Sydney, dated this 2nd of June, 2021.

HCA Honour Roll

Honour Roll of Presidents

Tenure	Name
2020- Present	Ms Elizabeth Carr AM MP/MC'04
2018-2020	Mr Charles Graham MBA'01
2016-2018	Mr Justin Greiner MBA'00
2014-2016	Ms Naomi Flutter MPP'98 & Ms Lisa George MPP'06
2012-2014	Mr Patrick Regan EdM'06
2010-2011	Mr Peter Hasko PMD'93
2008-2009	Ms Joanna White MBA'98
2006-2007	Mr Sam Weiss AB'76
2004-2005	Mr Ross Love MPA'88
2002-2003	Dr Melinda Muth MBA'81
2000-2001	Mr Philip Stern MBA'82
1998-1999	Mr David Pumphrey MBA'70
1996-1997	Mr Christopher Smith MBA'77
1994-1995	Mr Michael Quinn MBA'76
1992-1993	Mr Graham Bradley LLM'73
1990-1991	Mr Richard Kaan AM'65
1989	Mr Rodney Lester MBA'79

1987-1988	Ms Patricia Angly AB'69
1985-1986	Mr John C Conde MBA'74
1983-1984	Mr John K Doherty PMD'72
1981-1982	Mr John Armstrong MBA'59
1979-1980	Mr Ezekiel Solomon LLM'60
1977-1978	Mr David S Clarke MBA'66
1974-1976	Mr Theodore Simos LLM'59
1972-1973	Mr Harry Seidler MAR'46
1970-1971	Mr H. Anthony York MBA'64
1968-1969	Mr Brooks C Wilson MBA'59
1966-1967	Mr James D Wolfensohn MBA'59
1965	Mr William A Lockley, AMP'63
1961-1964	Professor Julius Stone, SJD'32

Honour Roll of Donors (donating >A\$1000)

Year	Name
2020	Yarranabbe Foundation
2020	Oliver Bladdek MBA '10
2020	Joanna Davidson*
2020	Prof. Andrew Byrnes*

2020	Jessica Roth*
2020	Dr. Errol Katz*
2020	Lionel Glendenning*
2020	Berg Family Foundation
2019	Oliver Bladek MBA'10
2019	Michael Ahrens LLM '62
2019	Roger Massy-Greene MBA'79
2019	Christopher Smith MBA '77
2019	Berg Family Foundation
2019	Bradley Family Foundation
2019	Yarranabbe Foundation
2019	Justin Punch MBA' 94

*denotes Menzies Scholars

R.G. Menzies Scholars and Awards

Year	Name(s)	School	Degree
2021	Paige Taylor	Government	MPA
2021	Dr. Helena Franco	Medical School	MMS
2020	Dr. Christopher Wong	Public Health	MPH
2020	June Ma	Economics	PhD

2019	Alistair Quinn	Public Health	MPH
2019	Brigid McManus	Law	LLM
2018	Scott Bolton	Education	EdM
2018	Simon Dickson	Government	MPP
2017	Claire Rochecouste	Government	MPP
2017	Ellen Chapple	Law	LLM
2016	Sibella Matthews	Government	MPP
2016	Nick Gattas	Business	MBA
2015	Patrick Mayoh	Government	MPP
2015	Andrew Thomas	Business	MBA
2015	Matthew Tyler	Government	MPP
2014	Amy Chandran	Government	MPP
2014	Simon Malian	Science	MSc
2014	Angela Winkle	Business	MBA
2013	Christopher Tran	Law	LLM
2013	David Boyd	Education	MEd
2012	Jessica Roth	Law	LLM
2012	Tristan Webster	Business	MBA

2012	Matthew Brown	Business	MBA
2011	Julia Smith	Education	MED
2011	Luke Raffin	JFK	MPA
2011	Angela Lopes	HBS	MBA
2010	Nayana Vootakuru	Public Health	MPH
2010	Gregory Keane	Public Health	MPH
2009	Dr Stephanie Ward	Public Health	MPH
2009	Ricky Campbell-Allen	Education	MEdu
2008	Clare Barnett	Public Health	MPH
2008	Maja Cassidy	Eng & Appl Sc	APD
2007	Rosie Dawkins	Public Health	MPH
2007	David Clarke *	JFK	MPA
2007	Adam Palmer *	GSAS	PhD
2006	Tracy Slatyer	GSAS	PhD
2006	Joanna Davidson	Law	LLM
2006	Scott Griffin	HBS	MBA
2005	Katie Maree Connolly	Government	MPP
2004	Michael Murphy	Business	MBA
2003	Belinda Baker	Law	LLM

2003	Dan Siskind	Public Health	MPH
2002	Alexandra West	Government	MPA
2001	Nicholas Vines	GSAS	PhD
2000	Quang Nguyen	Business	MBA
1999	Jonathan Liew	Gov Business	MPA MBA
1998	Jonathon Redwood	Law	LLM
1997	Monica Nolan	Public Health	MPH
1997	Sarah Vickers-Willis	Business	MBA
1997	Justin Wolfers	GSAS	PhD
1996	Sophie Gee	GSAS	PhD
1996	Errol Katz	Government	MPP
1996	Luan Low	Law	PhD
1996	Peter Thomas	Business	MBA
1995	Fleur Johns	Law	LLM
1994	Anna Donald	Government	MPA
1994	Alister Iles	Law	LLM
1993	Esther Charlesworth	Design	MAR
1993	Fiona Percy	Public Health	MPH
1992	Heather Luntz	Law	LLM

1992	Felicity Scott	Design	MAR
1992	Noel Blomeley	Education	MEd
1991	Kim Rubenstein	Law	LLM
1991	Richard Bergin	Business	MBA
1990	Anne Pender	Education	MEd
1990	Michael Hiscox	Government	PhD
1989	Mark Kestin	Public Health	MPH
1989	Graham Elliott	GSAS	PhD
1988	Kimberley Elkins	Education	PhD
1987	David Srimgeour	Public Health	MPH
1987	Simon Grant	GSAS	PhD
1986	Merilyn Alt	Government	MPA
1985	Patrick Carroll	Public Health	MPH
1984	Julian McCarthy	Business	MBA
1983	Andrew Byrnes	Law	LLM
1982	Hilary Charlesworth	Law	LLM
1982	John Carlin	GSAS	PhD
1982	Adrian Jones	GSAS	PhD
1981	Ian Davidson	Law	LLM

1980	Helen Nugent	Business	MBA
1979	Henry Rigney	Law	LLM
1978	Peter Frost	Education	EdD
1977	Peter Parsons	Law	LLM
1976	George Kuczera	GSAS	PhD
1976	P G Marshall	Business	MBA
1975	Graham McDonald	Design	MAR
1974	Christopher Bain	Public Health	MPH
1972	Christopher Beale	Business	MBA
1971	Terrey Arcus	Business	MBA
1970	Glenn Withers	GSAS	PhD
1969	Anatolij Cork	Law	LLM
1968	Lionel Glendenning	Design	MAR

Australian Harvard Fellowships

Year	Name(s)	School	Host
2020	No Awards		
2019	Karol Miller	University of Western Australia	Ron Kikinis M.D. Brigham and Women's Hospital, Boston
2019	Yu Shrike Zhang	Harvard Medical School	University of Sydney (Charles Perkins Centre)

2019	Yang (Ted) Teng	Harvard Medical School	Menzies Health Institute, Griffith University
2019	Joyce Bishoff Ph.D	Harvard Medical School	Centenary Institute
2018	Professor Thomas Bortfeld	Harvard Medical School	The University of Western Australia, The University of Sydney, and The University of Wollongong
2018	Professor Bruce E. Landon	Harvard Medical School	The Menzies Centre for Health Policy
2018	Vikram Khurana	Harvard Medical School	The Garvin Institute
2018	Rachael Coakley	Harvard Medical School	The Robinson Research Institute and the Women's and Children's Health Network in South Australia
2018	Jonathan R.Polimeni	Harvard Medical School	University of Queensland
2018	Prof. Philip Hogg		
2017	David Haig PhD	Harvard FAS	Sydney University
2017	Noel Michele Holbrook PhD	Harvard FAS	University Of Tasmania
2017	Zdenka Kuncic PhD	Sydney University	Harvard Medical School
2017	Sean W Cain PhD	Monash University	Harvard Medical School
2016	Brunch Moody MD	Harvard Medical School	Monash University
2016	Bruce Furie MD	Harvard Medical School	Centenary Inst. Sydney

2016	Elizabeth Klerman MD PhD	Harvard Medical School	Monash University
2016	Rowan Ogeil PhD	Monash University	Harvard Medical School
2015	Craig P Hunter PhD	Harvard FAS	Walter and Eliza Hall
2015	Kathleen Sweadner PhD and Elena Arystarkhova PhD	Harvard Medical School	Royal North Shore Hospital
2015	Paul Jackson PhD	University of Adelaide	Harvard Dept. of Physics
2015	Karol Miller PhD	University of WA	Brigham & Women's Hospital
2015	Wayne Hawthorne MD PhD	Univ of Sydney (Westmead)	Beth Israel Deaconess Medical Centre
2014	Simon Robson MD PhD	Beth Israel Deaconess Medical Centre	
2014	Chris Rogan PhD	Harvard University Dept of Physics	
2014	Ali Khademhosseini PhD	Harvard Medical School	University of Sydney
2014	Roger Fulton PhD	University of Sydney	Harvard Medical School
2013	Steve Krilis MB BS PhD	University of NSW	Harvard Medical School
2013	Hala Zreiqat PhD	University of Sydney	Harvard Dental School
2013	Paolo Divieti Pajevic MD PhD	Harvard Medical School	St Vincent's Institute, Melbourne

2013	Fariba Dehghani PhD	University of Sydney	Harvard Medical School
2013	Paolo Bonato PhD	Harvard Medical School	NICTA, University of Melbourne
2013	Gerhard Wagner PhD	Harvard Medical School	University of Melbourne
2013	Georges El Fakhri PhD	Harvard Medical School	University of Sydney
2012	Laura Berger PhD MMSc	Harvard Medical School	Monash, Adelaide and Sydney Universities
2012	Paul Foster PhD	University of Newcastle	Harvard Medical School
2012	Paul Allen MD PhD	Harvard Medical School	Newcastle University
2012	Ron Kikinis MD	Harvard Medical School	University of Sydney and UWA
2012	Vicki Rosen PhD	Harvard Dental School	University of Sydney and UWA
2012	Soroosh Radfar PhD	Harvard Medical School	University of WA
2012	Diane Fatkin MBBS MD	Victor Chang	Harvard Medical School
2012	Chris Landrigan MD MPH	Children's Hospital Boston	Monash, Sydney Children's Hospital, RPA
2012	Rima Rudd ScD MSPH	Harvard Medical School	Uni of Adelaide, Melbourne and NSW Clinical Excellence Commission

2011	Michael C McCarthy PhD	Harvard Sch. Of Eng.	University of Sydney
2011	Daniel E Janes PhD	Harvard FAS	University of Canberra
2011	Tyler L Bourke PhD	Harvard Astrophysics	Swinburne
2011	Ali Abbas PhD	University of Sydney	University of Sydney
2010	James Macklin PhD	Harvard Herbaria	ANU and CSIRO
2010	Paul J Morris PhD	Harvard Herbaria	
2010	John Quackenbush PhD	Harvard School of Public Health	University of Queensland
2010	Ali Khademhosseini PhD	Harvard Medical School	University of Sydney
2010	Richard L Stevens PhD	Harvard Medical School	University of Newcastle, UNSW and St George Hospital
2009	Kavi Bhalla PhD	Harvard School of Public Health	Flinders University
2009	Steven Lockley PhD	Harvard Medical School	Monash and Swinburne
2009	Robert Moir PhD	Harvard Medical School	University of Melbourne
2009	Harald Jueppner MD	Harvard Medical School	University of Sydney, Westmead
2009	Andrew McMahon PhD	Harvard FAS	University of Queensland and Children's MRI Sydney

2008	Simon Warfield PhD	Harvard Medical School	CSIRO
2008	Louise Ryan PhD	Harvard School of Public Health	CSIRO Brisbane
2008	Christopher French MBBS PhD	University of Melbourne	University of Melbourne
2008	Felipe Fregni PhD	Harvard Medical School	University of Sydney
2008	Matthew Gillman MD SM	Harvard School of Public Health	University of Adelaide
2008	Ofer Levy MD PhD	Children's Hospital Boston	UWA and Princess Margaret Hospital WA
2008	Paul Hoffman PhD	Harvard FAS	University of Adelaide
2007	Michael Starnbach PhD	Harvard Medical School	QUT
2007	Eric Mazur PhD	Harvard School of Eng.	ANU
2007	Abraham Loeb PhD	Harvard Astrophysics	University of Melbourne
2005/6	John Ayanian MD MPP	Harvard School of Public Health	University of Sydney
2005/6	Sven-Erik Bursell PhD	Harvard Medical School	St Vincent's Institute, University of Melbourne
2005/6	Richard Freeman PhD	Harvard FAS	University of NSW, School of Business
2004/5	Scott Edwards PhD	Harvard FAS	ANU
2004/5	Ashley Bush MD PhD	Harvard Medical School	University of Melbourne

2004/5	Charles Berul MD PhD	Harvard Medical School	Victor Chang Cardiac Research
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Ferris Family Non Profit Fellowship Recipients

Year	Name	Organisation
2021	Kristy Muir	Centre for Social Impact UNSW
2021	Heidi Limareff	Can:Do Group South Australia
2020	No Awards	
2019	Mr Matt Davis	Salvos Stores
2019	Ms Karen Crouch	Anglicare Southern Queensland
2018	Ms. Annabelle Daniel	Women's' Community Shelters
2018	Mr. Brendan Cox	Legacy Brisbane
2017	Ms. Jane Hutchinson	Tasmanian Land Conservancy
2017	Mr. John Hutcheson AM	Legacy NSW Associated Clubs
2016	Ms Karen Bevan	Playgroup NSW
2016	Mr Brendan Foran	Greening Australia
2015	Ms Kate Thiele	Guide Dogs SA/NT
2015	Dr Matthew Miles	MS Research Australia
2014	Ms Maree Sidey	Formerly Australian Drug Foundation

2014	Professor David Mackey	Lions Eye Institute
2013	Mr Mark Newton	Formerly St John Ambulance Australia (NSW)
2013	Dr W Brett Robertson	Formerly Ear Science Institute Australia
2013	Ms Julie Heraghty	Macular Disease Foundation Australia
2012	Mr Neil Carrington	ACT for Kids
2012	Ms Anita Kumar	The Infants' Home
2011	Mr Rory Jeffes	Sydney Symphony
2011	Ms Catriona Barry	Rainbow Club
2011	Mr Ian Trust	Wunan
2010	Mr Gregory Smith	Formerly Asthma Foundation NSW
2010	Mr Adrian Collette	Formerly Opera Australia
2010	Ms Katrina Frost	Formerly YWCA NSW
2009	Dr Andrew Young	Formerly CanTeen Australia
2009	Dr Judith Slocombe	The Alannah and Madeline Foundation
2009	Dr Michael Wilson	Juvenile Diabetes Research Foundation
2008	Prof Peter Schofield	NEURA
2008	Mr Cleveland Fagan	Apunipima Cape York Health Council
2007	Mr Gerard Neesham	Clontarf Foundation
2007	Mr David Beaver	Centacare, Catholic Diocese of Ballarat Inc

2006	Mr Darren Black	Outward Bound Australia
2006	Ms Jerril Rechter	Formerly Footscray Community Arts Centre
2005	Ms Stevie Clayton	Formerly ACON (Aids Council of NSW)
2005	Mr Lewis Kaplan	Formerly Alzheimer's Australia, NSW
2004	Mr Atticus Fleming	Australian Wildlife Conservancy
2004	Ms Sandie de Wolf	Berry Street Victoria
2004	Ms Mary Jo Capps	Musica Viva
2003	Mr Clyde Thomson	Royal Flying Doctor Service
2003	Mr Christopher Rehn	Formerly Cochlear Implant Centre
2002	Ms Rachel Healy	Formerly Company B Belvoir
2002	Ms Jill Weekes	Formerly Starlight Children's Foundation
2002	Ms Christine Rowell	Formerly CanTeen
2001	Ms Jane Schwager	Formerly Benevolent Society
2001	Mr James Pitts	Odyssey House McGrath Foundation

Sir James Wolfensohn Public Service Scholarship

Year	Name	Position & Organisation
2020	No Awards	

2019	Anne Skewes	Deputy Secretary, Land and Housing Corporation NSW Department of Family and Community Services
2019	Elizabeth Hefren-Webb	Deputy Secretary, Commonwealth Department of Social Services
2019	Jason Ardler	Deputy Secretary and Head of Aboriginal Affairs NSW
2019	Meredith Day Huntingford	Department of the Attorney-General and Justice, Northern Territory
2018	Darren Foster	Director General of the WA Department of Premier and Cabinet
2018	Damon Rees	CEO of Service NSW
2018	Rebecca McGarrity	Executive Director Queensland Department of Premier and Cabinet
2018	Richard Bolt	Secretary of Victorian Department of Economic Development, Jobs, Transport and Resources
2017	Ms. Caroline Edwards	Deputy Secretary, Commonwealth Health and Aged Care, Dept. of Human Services
2017	Mr. Michael Outram	Deputy Commissioner, Operations, C'wlth Dept. of Immigration and Border Protection
2017	Kym Peake	Secretary, Victorian Dept. of Health and Human Services
2017	Mr. Selwyn Button	Asst. Director General, State Schools – Indigenous Education, Qld Dept. of Education
2016	Mr Marc Innes-Brown	First Assistant Secretary, Middle East and Africa Division, Department of Foreign Affairs and Trade
2016	Mr Simon Draper	Deputy Secretary, Department of Premier and Cabinet

2015	Ms Katrina Carroll	Commissioner / CEO of Queensland Fire and Emergency Services
2015	Mr Michael Manthorpe	Deputy Secretary of the Commonwealth Department of Immigration and Border Protection
2015	Ms Frances Adamson	Australian Ambassador to China
2014	Mr Benjamin Rimmer	Associate Secretary of the Commonwealth Department of Human Services
2014	Dr Steven Kennedy	Deputy Secretary of the Commonwealth Department of the Environment
2014	Ms Susan Middleditch	the Acting Chief Executive of the Queensland Health Services Support Agency
2013	Ms Gill Callister	Secretary of the Victorian Department of Human Services
2013	Mr Bob Gee	Assistant Commissioner of the Queensland Police Service
2013	Dr Margot McCarthy	Deputy Secretary of the Commonwealth Department of the Prime Minister and Cabinet
2012	Mr Blair Comley	Secretary of the Commonwealth Department of Climate Change and Energy Efficiency
2012	Mr Martin Hoffman	Deputy Secretary of the Commonwealth Department of Resources, Energy and Tourism

The Public Education Foundation Scholarships to Harvard

Year	Name	School
2021	Damien Keel	Yarrowonga College p-12 (provided by Teachers Mutual Bank)
2021	Jenny Boyall	Katoomba High School NSW (HCA)

2021	Catherine O'Dea	Christies Beach Primary School SA (provided by PEF)
2020	Tracey Breese	Kurri Kurri High (NSW, rural)
2020	Michael Hornby	Mable Park State High School (QLD, metro)
2020	Paula Hambly	Batemans Bay High School (NSW, rural)
2019	Karen Duncan	Harrisdale Primary School (WA)
2019	Ann Caro	Lithgow High School
2019	Jesmond Zammit	Gorokan Primary School
2018	James Kozlowski	Endeavour Sports High School, NSW
2018	Paul McDermott	Blue Haven Public School, NSW
2018	Jennifer Parrett	James Fallon High School, NSW
2018	Hamish Woudsma	Banksia Road Public School, NSW
2017	Brett Burgess	Bribie Island State High School, QLD
2017	Jacquie O'Donnell	Rockingham Beach Public School, WA
2017	Melissa Proctor	Bass Hill Public School, NSW
2016	Simon Mulready	Floraville Public School
2016	Clayton Reedie	Dalmeny Public School
2016	Corrine McMillan	

2015	Scott Davidson (HCA Teachers Mutual Bank Scholar)	Cabramatta Public School
2015	Robert Houston (HCA Dept of Education and Child Development, South Australia Scholar)	Hahndorf Primary School
2015	Kate Smith	Hughes Primary School
2014	Andrew Peach	Bundamba State Secondary College
2014	Christine Hills	Glenmore State Primary School
2014	Jennifer Green	Boorowa Central School
2014	Malcolm McFarlane	Bowraville Central School
2014	Kaylene Rigas	Cambridge Park High School
2014	John Goh (HCA Teachers Mutual Bank Scholar)	Merrylands East Public School
2013	Mark Burnard	Chifley College – Bidwill Campus
2013	Judith Hayman	Griffith Public School

Roberta Sykes Harvard Club Scholars and Bursary Recipients

Year	Name(s)	School	Degree/Course
2020	Everal Eaton - Southern River College WA	HGSE	Principals Centre in Australia
2020	Carol Daniels - Armadale Senior High School WA	HGSE	Principals Centre in Australia
2020	Kylie Cattaway - Newton Moore Senior College WA	HGSE	Principals Centre in Australia
2019	Everal Eaton	HGSE	Leadership: An Evolving Vision

2017	Hayley Mansfield	HKS	Leading successful Programs – using evidence to assess effectiveness
2017	Tracey Bunda	HKS	Women and Power – Leadership in a new world
2017	Cheryl Godwell	HKS	Women and Power – Leadership in a new world
2017	Teela Reid	HKS	Emerging Leaders Program
2017	Yanis Bates	HKS	Emerging Leaders Program
2017	Helen Milroy	HKS	Leadership for the 21 st Century – chaos, conflict and courage
2017	Alison Whittaker	HLS	LLM
2017	Charles Prouse	HKS	MPA
2016	Fiona Jose	HKS	Authentic Leadership Development
2016	Katrina Fanning	HBS	Senior Executive Leadership program
2013	Kathleen Jackson	African & African American Studies	PhD
2013	Kevin Smith	HKS	SPNM
2013	Hans Bokelund	HBS	Strategic Negotiations: deal making for the long term
2013	Duane Vickery	HKS	Authentic leadership development
2012	Damein Bell	HKS	Creating collaborative solutions: innovations in governance

2012	Cecilia Gore Birch	HKS	Mastering Negotiation
2011	Tim Goodwin	HLS	Master of Laws

Harvard Club Scholarships to attend the Principals Centre in Australia 2020

Name	School	State
Matt Newell	Glenmore State School	Qld
Hilary Saunders	Yule Brook College	WA
Fiona Perry	Port Pirie West Primary School	SA
Louise Wilkinson	Heatley State School	Qld
Marissa Murphy	Gunbalanya Community School	NT
Tom Cain	Westernport Secondary College	Vic
Louise Davidson	Kellerberrin District High School	WA
Beverly Hansen	Dandenong West Primary School	Vic
Skai Perkins	Christie's Beach High School	SA
Mike George	Parafields Gardens High School	SA
Mikelle Miegel	Jervois Primary School	SA
Sharyn Crookes	Redlynch State College	Qld
Rebekah Bidois	Tully State High School	Qld
Kate MacDonald	Innisfail State College	Qld
Amanda Rankin	Berserker Street State School	Qld
Darryl Early	Nanango State High School	Qld

Karen Argus	Isisford State School	Qld
Danielle Hall	Driver Primary School, Palmerston	NT
Carol Putica	Ludmilla Primary School	NT
Karen Snibson	Phoenix P-12 Community College	Vic
Leah Mullane	Swayneville State School	Qld
Amanda Delvecchio	Granville East Public School	NSW
Bernie Davies	Top End School of Flexible Learning	NT
Emma Langton	Ntaria School, Hermannsberg	NT
Melanie Capper	Dumbleyung Primary School	WA
Teresa Wigg	Braeside Primary School	WA
Mary Chiodo	Copperfield College	Vic
Michelle Costa	Melton West Primary School	Vic
Kristie Anderson	Orange High School	NSW
Neal Reed	Gilgandra High School	NSW
Mark Jeffrey	Fremantle College	WA
Noelene Mason	Malibu School	WA
Jennifer O'Connor	Melton West Primary School	Vic
Kathy Cvitkovic	Melton West Primary School	Vic
Heather Murry	Biloela State High School	Qld
Donna O'Brien	Gillen Primary School Alice Springs	NT

Mandy Whybird	Mareeba State School	Qld
Grant Shepherd	Willyama High School	NSW
Ross Mackay	Broken Hill High School	NSW
Sandra Parker	Parkes High School	NSW
Renee Brown	Hilltop Road Public School (Deputy)	NSW
Leanna Hodges	Auburn West Public School	NSW
Katrina Hudson	Yirrakala School	NT
Natalie See	Hilltop Road Public School	NSW
Greg Turnbull	Blairmount Public School	NSW
Alec Solomons	Tikipunga High School, Whangarei	NZ
Robin Fabish	Tamatea High School	NZ
Julie Rose	South Hedland Primary School	WA
Chris England	Yirara College, Alice Springs	NT
Carol Daniels*	Armadale Senior High School	WA
Everal Eaton*	Southern River College	WA
Kylie Cattaway*	Newton Moore Senior High School	WA
Rohan Smith	Gilmore College	WA
Jennifer Ribeiro	Chifley College, Dunheved Campus	NSW
Natallia Maisie Floyd	Tennant Creek High School	NT
Grant Dale	Thuringowa State High School	Qld

*Aurora Education Foundation

The Clive Gard Scholarship

Year	Name	Organisation
2020	No Award	
2019	Andrew Hahn AMDP'18	IRT Group
2018	Sarah Tesar MPP '16	Integria Healthcare
2017	Jamie Snashall MPA'08	Telstra
2017	Vimpi Juneja MBA'00	Bank of Queensland
2016	Charles Walker, BBS'15	Walker Science
2015	Joanna Marsh AB'04	Lend Lease
2015	Joanna Brand JD'96	Billabong International Limited
2014	Dominic Katter PLDA'11	Royal Australian Naval Reserve
2013	Josephine Prideaux MBA'96	Spotless
2012	Naomi Flutter MPP'98	Deutsche Bank