

Philanthropy Australia podcast: the Stanford/Perpetual philanthropy toolkit

By Perpetual Private Insights

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Philanthropy Australia's Nick Richardson talks to Caitriona Fay and Heather Newberry Lord about the Stanford/Perpetual Philanthropy Toolkit – what it does, why it was needed and its uniquely Australian flavour.

The Stanford/Perpetual Philanthropy Toolkit is the ultimate practical guide to philanthropy. It is a step-by-step resource designed to help you, your family, and advisers engage in thoughtful conversations, be effective in your charitable giving and anchor your philanthropy around what most deeply inspires you.

This Australian version of the toolkit was developed as part of the partnership between Perpetual and Stanford's Center on Philanthropy and Civil Society (PACS) and was specifically designed and updated for an Australian audience.

As Managing Partner at Perpetual Private, Caitriona Fay has been a key part of the partnership with Stanford PACS that brought the Toolkit to life.

Heather Newberry Lord is a Senior Fellow at the Effective Philanthropy Learning Initiative at Stanford PACS. She's a NextGen philanthropist herself and has a real focus on reflective philanthropy. She was closely involved with the development of the Toolkit in the US and in the work to adapt it for the Australian experience.

Recently, Nick Richardson from Philanthropy Australia sat down with Cat and Heather to take an in-depth look at the toolkit. In a wide-ranging discussion the interview covered:

- The development of the toolkit and how it can help both new philanthropists and those who are well down the path on their giving journey
- The unique characteristics of Australian philanthropy and how that affected the development of the local version of the toolkit
- Getting younger philanthropists to leverage the approaches suggested in the toolkit.

Nick also quizzed Cat and Heather on the importance of giving values and the value of inspiration.

It's a deep discussion with something for everyone. Those committed to more effective philanthropy and those who want to dive into the deeper debates about philanthropic practice in Australia and around the world.

Start Listening

If you haven't already seen the toolkit, you can download it from the link below. It has sections covering everything from who to give to, how to give with your family, how to structure your giving and how to give in partnership with others. Whether you're new to philanthropy, an experienced giver or someone who wants to explore family philanthropy, the toolkit can help you give with more impact – and more joy.

Heather Newberry Lord is one of the Stanford PACS staff closely involved with the development of the Toolkit. You can find out more about Heather in this [interview](#).

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