

SOUTH WEST
COMMUNITY
FOUNDATION

from the ground up



Concise Annual Report 2010-2011

An overview

MESSAGE FROM THE CHAIR

It gives me great pleasure to report again on the progress and work of the South West Community Foundation. Following the flurry of activity last year in raising the funds required to qualify for the second allocation of Government funds to the Colac Sub-Fund, 2011 has been a year of steadier activity, but funds continue to grow and grants have been increased.

With the increase in our managed funds we have been able to actively work on our basic role of supporting and enriching our community through an increase in the level of Granting. This year we have made grants of \$20,162.00, supporting a range of projects and organisations across the region.

Fundraising has been quite a challenge. The region has been asked to support a number of other very important appeals over the past year. The success of these appeals has again underlined the high level of philanthropic generosity in our community, however it has also made it difficult for the Foundation to attract donors. Hopefully increasing the range of donor classes will make supporting the Foundation more appealing.

The thing that is special about our community Foundation is that it is a perpetual fund; it works exclusively to improve lives in our community and a donation continues to provide community support forever. This is basic stuff – us supporting each other in south west Victoria.

I look forward to continuing this good work into another year.

Barrie Baker

– Chair, South West Community Foundation.

A BRIEF HISTORY

The initiative to establish a Community Foundation in south west Victoria arose at the South West Community Capacity Consortium and was driven by the enthusiasm and energy of Josie Black, who also became the Foundation's inaugural Chair.

The Foundation was established as a public not-for-profit company limited by guarantee and formally launched by the Governor of Victoria, Professor David DeKretser, on 19 September 2007.

The Foundation's Trust Funds were registered as Deductible Gift Recipients (DGR) by the Australian Taxation Office in 2007 and as Income Tax Exempt Funds (ITEF) in 2011.

Josie Black, the Foundation's inspiration passed away in 2009 and is remembered through the Josie Black Memorial Fund. In 2010 following the receipt of a significant contribution from the State Government, the Colac Sub-Fund Management Committee was established within the Foundation. Several other personal named funds have also now been established.

In 2010 the funds under management reached \$500,000 and the Foundation now has a target of reaching \$1 million in 2012.

MISSION

To strengthen the community of South West Victoria through the encouragement of local philanthropy. The Foundation will support the community by using income from funds generated through donations, endowments and bequests.

OBJECTIVES

The objectives of the South West Community Foundation are:

- Build a substantial, permanent fund for charitable purposes in our region.
- Manage and invest funds prudently to optimize income available for distribution.
- Provide a simple, cost effective way for people to make donations to their community.
- Distribute the investment income to the community for charitable purposes.
- Support activities which aim to strengthen and develop our community.

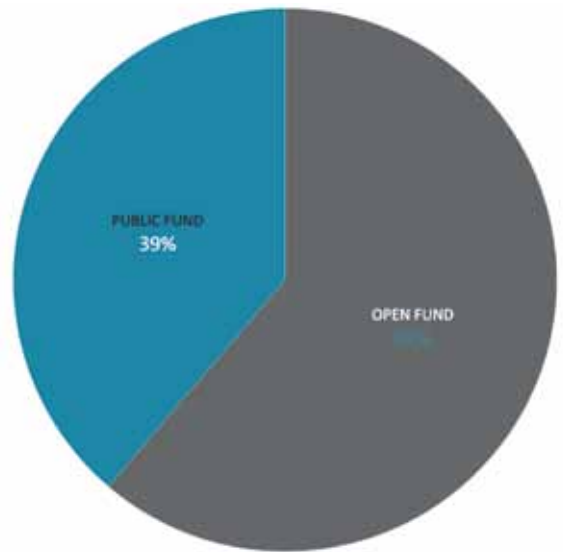
Financial overview

INCOME STATEMENT

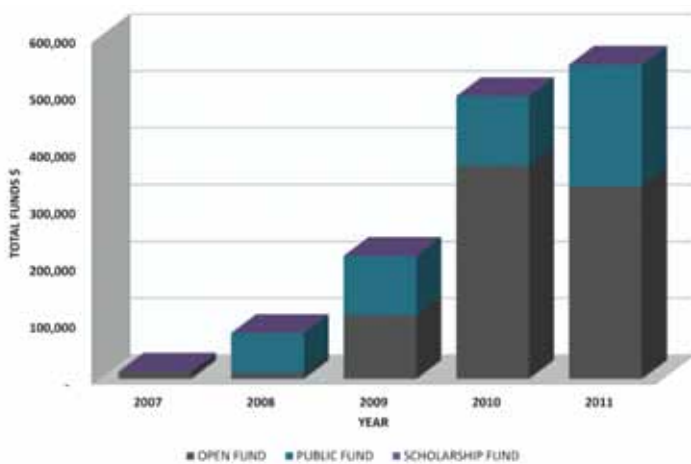
CONSOLIDATED ACCOUNTS FOR YEAR ENDED 30TH JUNE 2011

	2011 (\$)	2010 (\$)
Cash at Bank at start Year	493,824	205,488
INCOME		
Funding	-	10,000
Fundraising	13,235	39,603
Grants Received	-	200,000
Donations	69,539	45,849
Interest Received	17,498	7,395
Sponsorship	4,920	30,082
	105,192	332,929
EXPENDITURE		
Administrative Costs	28,421	23,262
Marketing	1,238	1,019
Bad Debts	5,000	-
Bank Fees	257	-
Depreciation	376	609
Fundraising Expenses	2,842	17,509
Grants Paid	11,022	-
Insurance	2,008	2,194
	51,164	44,593
Operating Surplus	54,028	288,336
Cash at Bank at end Year	547,852	493,824

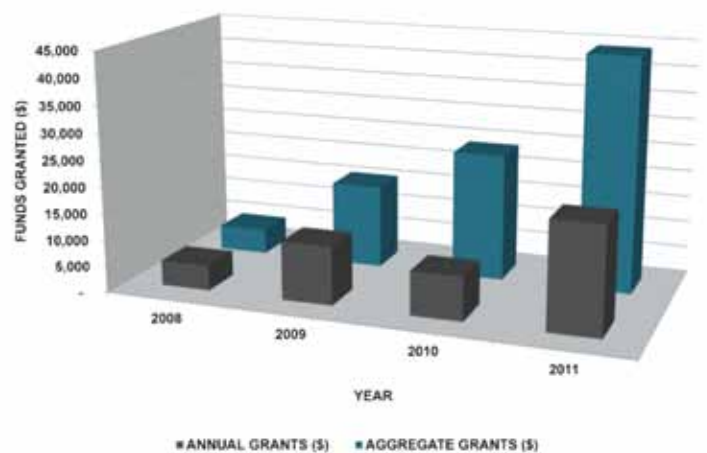
DISTRIBUTION OF THE FUNDS 2011



GROWTH OF FUNDS UNDER MANAGEMENT



FUNDS GRANTED BY THE FOUNDATION



The funds are *Growing*

Capital Growth

During the 2010/2011 year the South West Community Foundation funds increased by \$54,028 to \$547,852.

This increase was achieved despite a significant increase in grants, \$20,162 were approved this year.

Donations were received from a growing band of donors through direct and work place giving. All current donors are residents of south west Victoria that are choosing to "give where they live" to support the community they love.

This year the Foundation was particularly delighted to receive additional gifts from Mr. Niel Black. The significance of this gift is heightened by the fact that it adds to the Josie Black Memorial Fund established to honour the work of his former wife who was the inspiration and inaugural Chair of the Foundation.

Fundraising Events

Several valuable fundraising events were held across the year. The South West LLEN again provided a gala luncheon, this year featuring the work of Mr. Bill Quinlan in founding and managing the Warrnambool Co-Op over many years. More than 70 people attended the luncheon which was generously sponsored by the Lady Bay Resort in Warrnambool.

A Literary Afternoon Tea featuring Sue Ebury, author of "Weary – the Life of Sir Edward Dunlop" was held in Camperdown. Organised by a group of local volunteers under the leadership of Louise Manifold it was an extremely successful and well attended event.

A jazz evening, held at Wuurong, the delightful property of Dr Menzies was also a great fund raising and social event.

The Colac Sub Fund Committee continued its fine fundraising work with three events:

A dinner with guest speaker Dr. Dan McGannon, Head of Emergency Department at Dandenong Public Hospital, a lovely music night at Trinity College and a St Patrick's night at the former Wesley Church.

Sponsors And Donors

The work of the Foundation continues to be supported by contributions of cash and in kind support from a large and growing number of organisations.

Most notable amongst financial supporters have been Foundation for Rural & Regional Renewal and South West TAFE, which have each provided \$10,000 again this year. In addition to this there is a growing list of sponsors assisting with the work and particularly the administration costs of the Foundation.

In kind support is provided by a large number of individuals and businesses. Of particular importance to us is the support we receive from the local media including The Warrnambool Standard, ACE Radio, Colac Herald and Regional ABC. Our other critical sponsor is Sinclair Wilson -who through the probono contributions of Felicity Melican undertakes all the accounting and financial services needed by the Foundation.

2011 Sponsors

- **ABC Regional**
- **ACME Rural Supplies**
- **Brophy Family and Youth Services**
- **Colac Herald**
- **Corangamite Shire**
- **CRF**
- **Foundation for Rural and Regional Renewal**
- **GMHBA**
- **Lady Bay Resort**
- **Media Masters**
- **Moyne Shire**
- **National Australia Bank**
- **O2 Media**
- **Sinclair Wilson Investment Services**
- **South West Credit Union**
- **South West Institute of TAFE**
- **South West LLEN**
- **Telstra Country Wide**
- **Umney Media**
- **Warrnambool Standard**

Named Funds

New Named Funds

In addition to the Josie Black Memorial Fund the Foundation now has three other named funds. Personal or corporate named funds can be established through a significant donation to the Foundation. As well as exemplifying the philanthropy of the donor they can be used to recognise a family name, as a memorial to an individual or as the basis in which a business contributes to the community.

The Colac Sub Fund

This is a major sub-fund of the Foundation. It is overseen by a successful and dedicated committee, who in 2010 achieved their target of raising \$400,000.

In 2011 the committee continued working to grow the fund and distribute the earnings to worthy projects within the Colac region.

The Board is greatly indebted to the enthusiastic, professional and productive Committee without whom the Colac sub-fund would not be so effective in supporting their community.

Sincere thanks to Helen Paatsch (Chair), Victor Smith, Mary Stinchcombe, Rob Small, Chris Quinn, Dianne Loubey and Shirley Carew.

Josie Black Memorial Fund

Josie Black, OAM, described herself as a farmer and educator but her interests were diverse and passionate. She was actively engaged in a range of local and regional organisations supporting community development across several sectors including education and training, health, regional tourism, arts and youth development. She was committed to the sustainability of rural communities and fostered partnerships and collaboration between the public and private sectors.

Josie was the driving force behind the establishment of the South West Community Foundation, her diverse roles included membership of South West TAFE Board, South West LLEN Board, the Greater Green Triangle Area Consultative Committee, Sustaining Volunteering Initiative, Leadership Great South Coast, Terang and District Health Service, Corangamite Arts to name a few.

Josie was named Corangamite Shire Citizen of the Year in 1998, awarded the Order of Australia Medal in 2000 and in 2007 inducted into the Victorian Honour Roll of Women.

Frank Paatsch Memorial Fund

This fund was established by Helen Paatsch in memory of her late husband Frank.

As a fourth generation Colac Paatsch; Frank had a strong connection to his local community and this fund honours Frank's involvement with the community. The creation of the fund ensures that the good citizenship and generosity Frank exhibited in life will benefit the Colac community for perpetuity. Helen has been involved with the Foundation from the beginning and is currently a Board Director and Chair of the Colac Sub-Fund.

Louise & Robert Manifold Fund

'The Manifold family have been involved in the Western District for several generations. Throughout this time they have shown a genuine commitment to philanthropy and the growth of the community, something that we have always admired.

We have been living and working our sheep farming property for over thirty years. Recently we have become more interested in the family tradition of philanthropy and have been looking for ways to give back to the community.

We were attracted to the South West Community Foundation because of its local focus. For us it was important that the money we gave stayed within the local geographic area and went to help people who live in South West Victoria.' *Robert and Louise*

Opportunities For Named Funds

The Foundation works with donors and supporters to provide flexible options that allow emerging philanthropists to be recognised for their community giving. An example of this is the partnership between the Foundation and The Hampden Football Netball League (HFNL) in developing a scholarship fund. The League will continue to build this fund to an individual named fund level over the coming years.

The Board is working to promote the option of Corporate named funds to local and regional businesses and encourages any organisation thinking about reviewing their social responsibility to discuss their options with the Foundation.

Benefits to the community

Benefits Of Grants Past

Projects undertaken through previous granting rounds continue to grow. The Foundation maintains a keen interest in the ongoing work of all the organisations and groups they have supported. The following projects are examples of how the Foundation helps to build the community "From the Ground up".

Warrnambool Community Garden

The Warrnambool Community Garden is an excellent example of a community building initiative. In 2008, the Foundation provided the Committee of the Warrnambool Community Garden with a grant to fund the costs of a public launch event. Since then, membership has grown significantly, there are more than 100 members and all 50 garden plots are allocated. More than a garden, the Committee are currently in the process of building a 'hub' facility on site that will be used to run educational workshops that aim to increase the health, well-being and sustainability of the entire community.

Nullawarre Playgroup

In 2009 The Foundation partnered with retired carpenter John Snaauw to provide the Nullawarre playgroup with furniture and resources required to open a play group in Nullawarre. The play group continues to operate and the beautiful children's desks and chairs hand made by John are a favourite with all the children.

Silver Notes Choir

The Silver Notes Choir is a group of senior citizens from the district who regularly perform concerts in retirement homes and community centres. Their goal is to ensure that people, no matter how advanced in age or disability, have the opportunity to get joy from listening to music and song. In 2010, the Foundation made a grant to the Silver Notes for the purchase of a public address system and digital recorder.

This equipment enhances performances and allows the choir to make low cost recordings of their music for distribution in community centres, retirement homes and at community events.

Colac Police Youth Liaison Team

– Beechy Rail Adventure Trek (BRAT) 2011.

Supervised by Colac police youth resource officer, this two day hike from Beech Forest to Barongarook aims to give Colac youth life experience and leadership skills.

The program provides an opportunity for young people to undertake a challenging and rewarding experience, which often results in the formation of long term friendships amongst participants.

In addition to the trek itself there is a presentation to the teens on drug and alcohol awareness. The first trek was in 2004 and this year the 400th trekker was registered. Two separate treks are run annually, the Colac sub-fund supported both the Boys and the Girls Treks in 2011.

2010-2011 Grant Recipients

- Irrewarra Country Fire Authority - Digital camera and computer software
- 1st Cobden Scout Group - Painting Works
- Port Fairy Men's Shed - Electrical Tagging/ Testing Equipment Training
- Nullawarre Playgroup – Play equipment
- Silver Notes Choir - PA & digital recorder
- Tai Chi for Arthritis Group-Training
- Café Meals Club – Meal subsidies
- Community Hub – Barbeque facilities
- Corangamite Regional Library - Audio visual aids
- Colac and District Riding Club - Generator
- Victoria Police - Beechy leadership trek

Friends and supporters

How To Help

The South West Community Foundation provides a means by which ordinary people can become philanthropists.

The SWCF was established to allow the community to enjoy the benefits provided by philanthropy both to the donors and the recipients. Most people gain pleasure from being able to help others, particularly when this assistance supports a need in their own community.

The Foundation welcomes donations of any size – big or small, one off or regular, through workplace giving or in advance through a bequest.

During the past year a number of unique donor options have been adopted to ensure that people are provided with opportunities to give in the way they choose. The diversity of options reflects the many and varied reasons that people may have for wanting to be philanthropic.

Named Funds

Personal Named Funds (involving a minimum promised donation of \$10,000) allow a person or a family name to be recognised.

A Corporate Named Fund (involving a minimum promised donation of \$20,000) provides an opportunity for any business or corporate body to be recognised as a philanthropic supporter of their community. This can help a company to simplify the way they respond to requests for donations.

All donations are recorded and if a person or organisation's donations accrue to a named fund level they will be offered the opportunity to register a named fund. This is ideal for many donors as it means that they can give small amounts over time.

Bequests

Some people wish to be philanthropic but are not in a position to release funds immediately and choose to make a bequest. Where people are prepared to declare their bequest in advance, their commitment will be recognised by the Foundation.

Regular Donations & Workplace Giving

This and other direct debit giving allows people to make regular, small, tax deductible philanthropic gifts. All regular donors become Friends of the Foundation.

There are currently four large organisations who have employees that give to the Foundation through the Workplace Giving Program. These regular contributions become significant over time and are important to ensuring the ongoing growth of the Foundation's managed funds. Over the next financial year the Board and Friends of the Foundation will continue to actively promote workplace giving as a fund development initiative where individuals can contribute a small amount each week to make a sizable fully tax deductible donation over the course of the year. The Foundation would like to hear from you if you are interested in being involved, either as an individual or as a workplace.

Ambassadors And Friends

People also support the Foundation as ambassadors – volunteers who assist through helping to organise fundraising events, encouraging in-house work place giving programs or otherwise assisting the Foundation in spreading awareness and information about the work being done. We are most indebted to a number of hard working Ambassadors. In particular we would like to acknowledge Laurel Myers, Helen Bayne, Craig Midgley, Sandra Plummer and Toni Jenkins.

CONTACT THE FOUNDATION:

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Also: Find us on Facebook

Foundation Board

The Members of the Board of the South West Community Foundation volunteer their skills and time to the Foundation. They are chosen specifically for their particular skills, close connections with their communities, and association with some part of the south west region.

The Board annually invites expressions of interest from community members who believe that they have something to contribute to the Board.

BARRIE BAKER (CHAIR)



In his 22 year role as Director of South West Institute of TAFE Barrie formed strong connections across the south west region and continues this regional involvement as Chair of the Foundation. Barrie is dedicated to the task of leading the Foundation towards achieving its target of \$1 million in managed funds by June 2012.

LOUISE MANIFOLD (DEPUTY CHAIR)



Louise has lived in the Camperdown region for 30 years. In addition to interests in a range of sectors, Louise is passionate about building sustainable and independent rural communities. Louise aims to assist the Foundation to identify partnerships that will increase the capacity of the Foundation to fund larger programs.

CAROLINE ANDRIVON



Caroline's business experience has given her invaluable insight into the importance of supporting communities in a structured manner that achieves optimum impact. She is focused on strengthening rural and regional areas through initiatives which lead to greater social, economic, physical and emotional wellbeing.

WAYNE KRAUSE



Wayne brings a depth of financial, banking and accounting expertise to the Board from a variety of sources. As Chair of the investment Committee Wayne works to ensure Foundation funds are managed according to the Foundation's Investment Policy.

HELEN PAATSCH



Helen has been actively involved in Colac-Otway community activities for many years. Through her role as Chair of the Colac Sub-Fund, Helen has led the Committee and community to achieving their target of \$400,000 in managed funds. Helen is committed to growing this and increasing the grants available to worthy Colac region projects and organisations.

MARK BRIAN (OAM)



Mark uses his legal background and significant Board experience to ensure the Foundation maintains best practice governance standards. Mark through his community work has been a key figure in progressing the Hamilton region, an effort which was acknowledged in 2011 when he was awarded a Medal of the Order of Australia.

BERNADETTE NORTHEAST



Bernadette through her involvement with fund seeking community groups understands the significant role the Foundation plays in growing a permanent fund that ensures even small donations can make a large difference. Bernadette's ongoing goal is to encourage younger people to see the value of giving to the communities in which they live.

BILL QUINLAN



The mission of the Foundation directly appeals to Bill's passion for community building. His experience in raising funds for major projects across the region is an enormous benefit to the Foundation. As Chair of the fundraising committee Bill is committed to growing the corpus and in turn increasing the funds available for granting.