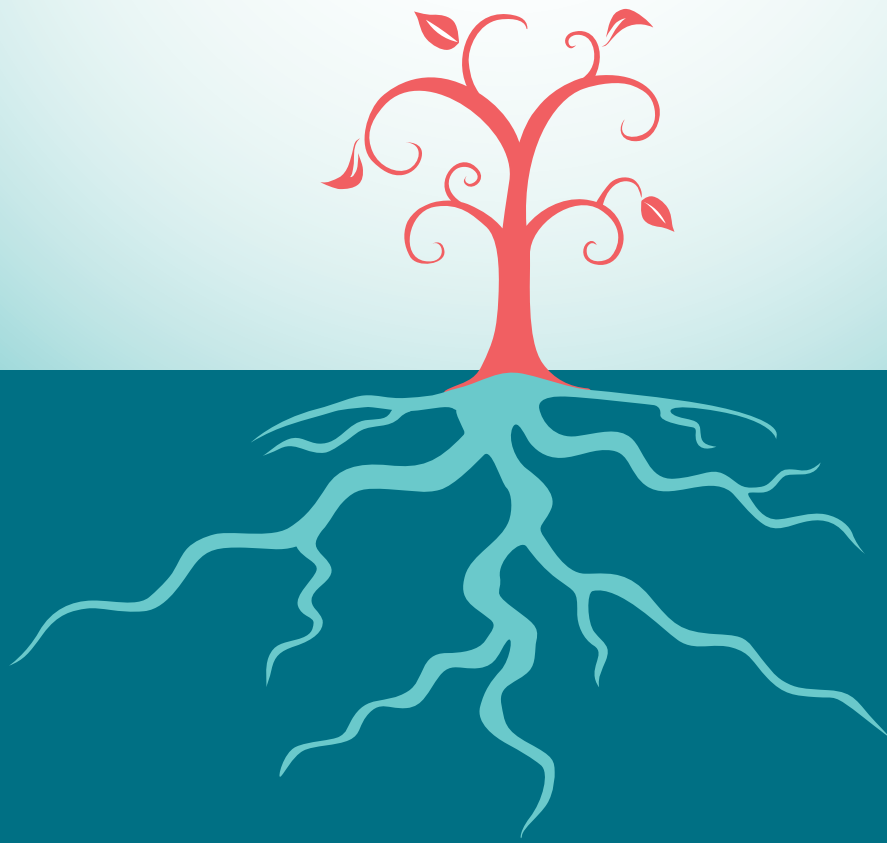




SOUTH WEST  
**COMMUNITY**  
FOUNDATION

*From the Ground Up*



**Concise Annual Report**  
**2011-2012**

# An overview



SOUTH WEST  
**COMMUNITY**  
FOUNDATION

## MESSAGE FROM THE CHAIR

This Annual Report represents the completion of five years of operation of the Foundation.

A great deal has been achieved in that relatively brief time both in accumulating a corpus that can start to generate meaningful income and in the grants already distributed for the benefit of our region. There is a long way to go before Josie Black's dream can be fully operational, but a strong start has been made.

Donations to the Foundation in the 2011/2012 year were more than three times those of the previous year. One pleasing aspect of this growth in donations is the increasing number of people that see the Foundation as a worthy part of their charitable giving. Another is the positive opportunity that the Foundation has been able to provide for situations or individuals where funds are available to support the community without being limited to a single cause. A named memorial donation for a loved community member; the proceeds from the wind-up of a community organisation; or the residual funds from another activity – all these situations have arisen this year and have found the Foundation to be an appropriate way to go.

With the grants about to be announced we will have distributed more than \$30,000 this year which is a significant increase on last year's figure. While this is a modest figure it can still do great good in the community.

This year for the first time the Foundation was responsible for contributing to and distributing \$12,500 in \$50 vouchers as part of the state-wide "Back to School" program underwritten by FRRR and the Myer Foundation. This program helps children whose families struggle with the costs of setting up for a new school year. This is exactly the sort of work the Foundation is set up to do.

With each year the Foundation finds new ways to serve the community and I look forward to what 2013 will bring.

*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. It is governed by a Board of honorary Directors selected from across the region for their special skills and community involvement.

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

Josie Black, the Foundation's inspiration and inaugural Chair 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 and related Advisory Committee were established within the Foundation. Several other personal named benefactors have also now been recognised.

In 2010 the total funds under management reached \$500,000 and in 2011 the Scholarship Trust Fund was brought into action for the first time.

With promised donations coming in, the Foundation will have \$1 million under management by the end of 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 the investment of donations, endowments and bequests.

## OBJECTIVES

The objectives of the South West Community Foundation are to:

- Build a substantial, permanent fund for charitable purposes in our region.
- Manage and invest funds prudently to optimise 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

## FINANCIAL STATEMENT

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2012

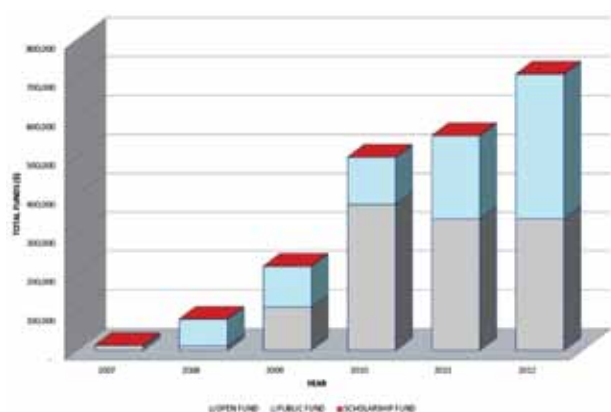
	2012 (\$)	2011 (\$)
<b>Cash at Bank at start Year</b>	<b>547,852</b>	<b>493,824</b>
<b>INCOME</b>		
Fundraising	7,088	13,235
Grants Received	10,535	-
Donations	150,896	69,539
Interest Received	21,567	17,498
Sponsorship	8,152	4,920
	198,238	105,192
<b>EXPENDITURE</b>		
Administrative Costs	5,711	28,421
Marketing	6,656	1,238
Bad Debts	-	5,000
Bank Fees	29	257
Depreciation	301	376
Fundraising Expenses	2,192	2,842
Grants Paid	18,211	11,022
Insurance	2,038	2,008
	35,138	51,164
Operating Surplus	163,100	54,028
<b>Cash at Bank at end Year</b>	<b>710,952</b>	<b>547,852</b>



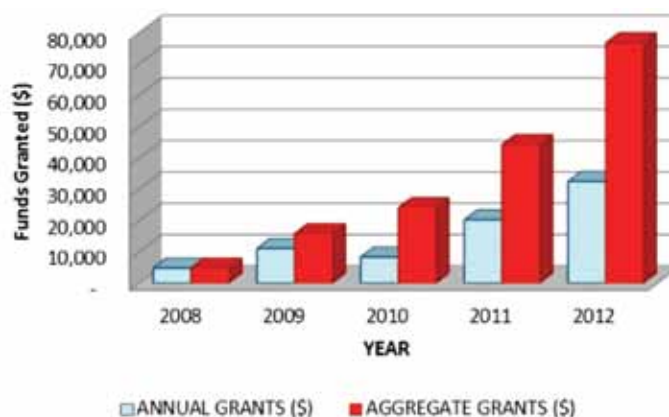
DISTRIBUTION OF THE FUNDS 2012

- 48% Open Fund
- 52% Public Fund
- 0% Scholarship

GROWTH OF FUNDS UNDER MANAGEMENT



FUNDS GRANTED BY THE FOUNDATION



# The funds are *Growing*

## Capital Growth

During the 2011-12 year the South West Community Foundation funds increased by \$163,100 to \$710,952.

This supported a significant increase in funds available for granting, in 2012 a total of \$32,461 in grants were approved.

Donations of \$150,896 were received from 39 donors, many of whom donate annually. Donors are mainly long term residents of south west Victoria that are choosing to “give where they live” to support the community they love.

While it is normally difficult to identify individual donors, 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 Josie who was the inspiration and inaugural Chair of the Foundation.

## Foundation Week

Foundation Week celebrated in June is a significant annual event on the Foundation's calendar. During the week, the Board celebrates, promotes and builds on the work of the Foundation.

The week was launched with a donation and tree planting ceremony at the Warrnambool Community Garden. The Foundation donated five fruit trees to the garden to celebrate five years of successful operation for both organisations. The Community Garden was one of the Foundation's inaugural grant recipients and remains an excellent example of the type of programs the Foundation's Board likes to fund.

The fundraising aspect of the week was an enormous success thanks to Warrnambool businesses, Brightbird Espresso and Bojangles Restaurant for hosting promotional days and donating proceeds of product sales.

Foundation Week ended most enjoyably at our first donor recognition event, where some of the Foundation's sponsors and supporters met with previous grant recipients to hear about the value of community work performed through Foundation grants.

## Colac Sub Fund

The Colac Sub Fund Committee of the SWCF is a dedicated group of local people committed to furthering the cause of local philanthropy in general and specifically in strengthening the Colac community through fund raising and the distribution of grants.

All actively involved in local affairs, Committee members bring a wealth of knowledge and understanding of the local community to the discussion table. From a core fund of \$400,000 interest generated has been used to provide grants totaling \$15,000 to a number of Colac and district community groups in 2011-12.

The Foundation's Board extends their thanks and gratitude to this small and dedicated committee comprising Helen Paatsch (Chair), Shirley Carew, Greg Fletcher, Dianne Loubey, Chris Quinn, Victor Smith and Mary Stinchcombe.

## Fundraising Events

Several valuable fundraising events were held across the year. In November 2011, local resident and internationally renowned author Paul Jennings was a popular guest at the Foundation's Annual Gala luncheon. The event was supported by the South West LLEN and the Lady Bay Resort in Warrnambool and Paul generously donated the proceeds of sales of his book on the day.

Early in March, Terang residents enjoyed the opportunity to support the Foundation and enjoy a nostalgic trip back to the fifties at a luncheon with Dr. Brian McFarlane. Author of the book 'Real and Reel', Brian entertained the audience with tales of his time as a teacher at Terang High, his involvement with the Terang Dramatic Society, and his many adventures as a movie tragic and university lecturer. Much to the delight of former students, Brian was accompanied by his teaching colleague John “Johnno” Johnson.

The event in addition to being a successful fundraiser was particularly enjoyable because it celebrated the strong community connections Terang has with both current and past residents.

The Colac Sub Fund Committee also continued its fine fund raising work hosting an event featuring former Colac resident and well-known journalist, academic and co-author of 'Gut Instincts' Andrea Carson.

# Benefactors and *Memorials*

The Foundation seeks to work with donors and supporters to provide flexible options that allow those that have supported their communities to be recognised. This is done by the recognition of major donors as Named Personal or Corporate Benefactors. Another option is to have the lives and/or work of others recognised and remembered through the establishment of a Named Memorial.

The following are the current Benefactors and Memorials.

## **Josie Black Memorial**

Josie Black OAM, was the driving force behind the establishment of South West Community Foundation. Her other roles included membership of South West TAFE Board, South West LLEN Board, the Greater Green Triangle Area Consultative Committee, South West Volunteering Initiative, Leadership Great South Coast, Terang and District Health Service, Corangamite Arts and others.

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

## **Frank Paatsch Memorial**

This Memorial 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 community and this honours his involvement and input. Through this Memorial the good citizenship and generosity Frank exhibited in life will continue to benefit the Colac community for perpetuity. Helen is a Board Director and Chair of the Colac sub-fund.

## **Louise And Robert Manifold**

The Manifold family have been involved in the Western District for several generations.

“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*

## **Koroit And District Health Service**

With the closure of the nursing home run by the Koroit and District Health Service, the Service's Board decided to direct the residual funds back to the benefit of the regional community by becoming a benefactor of the Foundation.

It is hoped that in time their contribution to the Foundation will grow to the extent that will permit the establishment of a Sub- Fund. This in turn will allow the income from this endowment to be more closely directed to the development needs of the Koroit region and an ongoing interest in the health and well being of its community.

## **Kate Armbruster Memorial**

Kate was a young resident of Port Fairy, noted for her boundless energy and active involvement with community causes. She was a strong supporter of environmental issues, youth disadvantage, and cultural activity in her church and community.

She died prematurely from leukemia during 2012 and her many friends decided to perpetuate her memory and work by establishing a Memorial fund. Establishment of the Memorial provided an outlet for the frustration felt by many people in not being able to help Kate during her time of crisis.

Her friends hope that this Memorial will generate income that would support granting towards community music and the needs of young people in the region.

# Granting to the community

## Benefits Of Grants Past

The Foundation maintains a keen interest in the ongoing work of all the organisations and groups it has supported. The following projects are examples of how the Foundation helps to build the community “from the ground up”.

## Back To School Vouchers

The Back to School Program is an initiative of the Foundation for Rural and Regional Renewal (FRRR) and the Sidney Myer Fund. At the beginning of 2012, the South West Community Foundation undertook to administer the program in this region. The Foundation was initially allocated 200 x \$50 Target store vouchers, a contribution of \$1250 increased the allocation to 250 vouchers with a total value of \$12,500.

The program supports families in need to meet some of the costs associated with children returning to school. The vouchers can be used to purchase uniform, footwear, or stationary items. Research shows that children experiencing disadvantage are at significant risk of leaving or not attending school.

The Foundation asked schools to identify families in need and the stories were heartbreaking. This year the Foundation supported 175 families we were thrilled to be able to support every family identified and in most cases to provide one voucher per school aged child.

## Port Fairy – Warrnambool Rail Trail

Opened on the 31st May 2012, the Port Fairy to Warrnambool Rail Trail is a fabulous resource for residents and visitors. In 2011, the Foundation, recognising the importance of such an asset provided a Grant to the Port-Fairy - Warrnambool Rail Trail Committee for the purchase of a marquee. This marquee has been a major asset to the committee supporting events and functions aimed at raising the profile of the trail and also to provide shelter for rail trail volunteers and supporters undertaking maintenance and upkeep works on the trail.

## Port Fairy Belfast Lions Club

The Lions Club in Port Fairy has for a number of years been providing a smoke detector battery changing service to older people and those with a disability. In their 2010 check, they noted that a large proportion of detectors were faulty. The Foundation supported the Club to purchase 130 detectors to install in these homes. The program has now expanded to include

Koroit and district. The Lions club reported that in addition to increasing the safety of some of our most vulnerable community members the program had encouraged all residents to consider their home and fire safety.

## Weerite Rural Fire Brigade

The Weerite Fire Brigade used a Foundation Grant to purchase and install Brigade and Community Noticeboards. For the volunteers, communication of Brigade activities, training and safety messages including rosters has been invaluable. For the broader community, the noticeboard represents a source of safety and hazard information. In a recent audit the Weerite Fire Brigade received an unprecedented 100% and their noticeboard system has been proposed to other rural Brigades across Victoria. We are proud of our support of this small project that makes a big difference in growing the capacity and resilience of a rural community.

## 2011-2012 Grant Recipients

- \$5000 Colac Police Youth Liaison Team  
Two Beechy Leadership Treks
- \$5000 Cafe meals Club  
Subsidised meals for youth
- \$2520 Port Fairy-Belfast Lions Club  
Replace faulty smoke alarms for elderly citizens
- \$2500 Community Hub Inc.  
Barbeque facility
- \$1700 Corangamite Regional Library  
I.T. Equipment for meeting room
- \$1564 Adult Riding Club  
Generator
- \$1500 Timboon & District Health Service  
Equip Timboon Youth Drop in Center
- \$1000 Portland Men's Shed  
Tools & equipment
- \$710 Realise Enterprises (Tasty Plate)  
Upgrade telephone system
- \$565 Port Fairy – Warrnambool Rail Trail Committee  
Marquee
- \$297 Weerite Rural Fire Brigade  
Community fire notice and display board

### SCHOLARSHIPS AND SCHOOL VOUCHERS

- \$1750 Hampden Football Netball League  
Scholarships  
Primary and secondary school student recipients
- \$12,500 'Back to School' Vouchers  
250 vouchers distributed to students

# Friends and supporters

## How To Help

The South West Community Foundation was established to support the needs of our region and to allow the community to enjoy the satisfaction that philanthropy can provide. 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.

A number of special styles of donor have been established to better cater for the reasons that people may have for wanting to be philanthropic.

## Named Benefactors And Memorials

Establishing a Named Benefactor (involving a minimum promised donation of \$10,000) allows a person, a family or a business name to be permanently recognised as a significant contributor to their community and become an on-going benefactor through the Foundation.

For businesses, being a Corporate Named Benefactor can represent their community support and simplify the issue of responding to the many appeals from individuals and causes that canvas support.

A Named Memorial is a way of remembering a special person and ensuring that their name and legacy continues for perpetuity.

## Bequests

Some people wish to be philanthropic but are not in a position to release funds immediately and therefore choose to make a bequest. Where people are prepared to declare their bequest in advance, they will be invited to take part in Foundation activities and can gain some of the personal satisfaction that philanthropy provides.

## Friends And Ambassadors

Workplace Giving and other Direct Debit Giving allow people to make small, regular, tax deductible philanthropic gifts. This giving accumulates and whilst it may be a small amount to the donor is greatly valued by the Foundation. All regular donors are Friends of the Foundation.

People also assist the Foundation as volunteers are our Ambassadors. They assist through helping to organise fundraising events, encouraging work place giving programs or otherwise assisting the Foundation in spreading awareness and information about the Foundation's activities.

Our active and achieving ambassadors are a major part of the success of the Foundation; we particularly recognise the ongoing support and commitment of: Emily Lee-Ack, Laurel Myers, Helen Bayne and Toni Jenkins.

## Sponsors And Supporters

The Foundation could not support the region without the generosity of our sponsors. These partnerships allow the Foundation to undertake the business of growing funds and granting the interest to the community. The financial support of SW TAFE covers a majority of operating costs thereby, maximising the benefits of donations. Other organisations provide significant in-kind support that reduces the Foundation's overheads. 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 brighter more vibrant logo image is courtesy of Karen Foster and the team at O2 Media.

Critically, we receive professional accounting and financial services from Felicity Melican and Sarah Burchell of Sinclair Wilson.

## 2012 Sponsors

- ABC Regional
- ACME Rural Supplies
- Bojangles Restaurant
- Brightbird Espresso
- Brophy Family and Youth Services
- Bulla
- Colac Herald
- Corangamite Shire
- CRF
- Foundation for Rural and Regional Renewal
- GenR8
- GMHBA
- Lady Bay Resort
- Media Masters
- Moyne Shire
- National Australia Bank
- Northeast Stockdale and Leggo
- O2 Media
- Powercor
- Sinclair Wilson
- Investment Services
- South West Credit
- South West LLEN
- Star Printing
- SW TAFE
- Telstra Country Wide
- Umney Media
- Warrnambool Standard

## CONTACT THE FOUNDATION:

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Also: Find us on Facebook

# Foundation Board



SOUTH WEST  
**COMMUNITY**  
FOUNDATION

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 have an enthusiasm for local philanthropy and 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 in 2012.

## LOUISE MANIFOLD (DEPUTY CHAIR)



Louise has lived in the Camperdown region for 30 years. In addition to interests in a range of sectors including health, education and the Arts, Louise is passionate about building sustainable and independent rural communities.

Louise aims to assist the Foundation to identify partnerships both public and private that will increase the capacity of the Foundation to fund larger programs.

## HELEN PAATSCH



Helen has been actively involved in the Colac-Otway community for many years. Through her role as Chair of the Colac Sub-Fund, Helen has led the Committee and community to achieving and exceeding their fundraising targets and increasing the grants available for worthy

Colac region projects and organisations.

## MARK BRIAN (OAM)



Mark's legal background and significant Board experience are invaluable. He supports the Foundation to implement best practice governance standards and is working with the Board to develop a strategic plan to guide operations into 2015 and beyond.

## WAYNE KRAUSE



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

## 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 amounts 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 (OAM)



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 Fund Development Committee Bill is committed to growing the corpus and in turn increasing the funds available for granting.

## CRAIG MIDGLEY



Craig has an extensive background in community development in both Local and State Government and communities across Victoria. His significant connections and networks in South West Victoria ensure that the Foundation is promoted throughout the region. Craig has a thorough knowledge of the challenges and opportunities facing the smaller communities of the region and he is committed to ensuring the Foundation's work in these towns is effective.

## CAROLINE ANDRIVON (Retired March 2012)

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.