



**SOUTH WEST
COMMUNITY
FOUNDATION**

2019-2020 *Annual Report*



A message *from the Chair*

In this our 13th year of operation, it is a pleasure to present to you our Annual Report for 2019/2020.

As it has been for every one of you, it has been a remarkably challenging year for the Foundation, however, we remain strong and dedicated to the service of our community and its needs.

At the close of the financial year and amidst the market uncertainty of COVID-19, we find our assets at \$1.76 million dollars and our total grants at just short of \$1 million. In this year alone, we were able to distribute \$107,581 between 33 vital community organisations and projects. We look forward to passing the \$1 million dollar milestone in 2021. Furthermore, we distributed 390 Back-to-School Vouchers to 61 of our regions schools to help ensure our children can get the best start in their educational life. We thank the Foundation for Regional and Rural Renewal for this initiative and we are proud to play our part in this program for our region.

I like to think of society as sort of a large tube with sand flowing through it. Within it are the pillars of our society; the justice system, education, government, healthcare. While they do a good job on policy for the majority, they are big, clunky institutions that can miss grass-roots community needs. NGOs, aid and religious organisations try to fill the gaps, but they can't do it all. At the small end are you and me; we are neighbours, friends, colleagues, we play on the same teams and belong to similar clubs. In a modern world it's difficult sometimes to maintain these relationships and the networks that sustain us. For some people, they don't have them at all for a variety of reasons. Sometimes they fall through the cracks.

This is where a phrase like "falling through the cracks" comes from. This is where grass roots community-based organisations play their most vital role. They are the groups, sometimes just one or two, hard-working volunteers, that apply a little glue, a little "no more gaps", to our social fabric that all other organisations in our metaphoric tube cannot. In my eyes, they are the true heroes of modern society. They identify a small but very important need and more importantly, actually DO something about it. They give their precious time, passion and energy to fulfil a societal need. The problem is that they need more than that to fulfil their role. They need money to help them buy the tools, the equipment and the ingredients of their particular glue.

That's where the South West Community Foundation is so important to our region, with the generous donations of our community, we can fill that role and provide some of the money, so these very important groups can make a real and lasting impact. In that manner, we like to consider the South West Community Foundation to be a store of community resilience. We look forward to telling the story of these inspirational organisations, hidden heroes and simply brilliant projects that make our regional community great.

We hope that they inspire you to help in any way you can, join the organisation, volunteer your time and if you have the capacity, consider reaching into your pocket and giving something back.

Unfortunately, there is always more need than we can support. To give you an idea, we received 80 applications for over \$400,000 last year, of which, we could only fulfill \$107,581.00.

The work of the Foundation is ongoing and complex. I humbly thank our dedicated board of directors for their continuing contribution and passion. This year we welcome new directors, Angie Paspilaris and Carole Reid who have already made significant contributions around the table. We are proud of the gender and regional diversity of our board.

We also humbly thank our donors who continue to sustain our funds and our generous corporate partners who help us so expertly year in, year out. I would particularly like to thank Sinclair Wilson who do a tremendous job in helping us with our accounts, finance, compliance and governance.

Since the close of the financial year and this report, we advise that our Executive Officer, Karen Norris and the Foundation have decided to go our separate ways. Karen brought a great deal of innovation and organisation to the role over 5 and a half years and we wish her well as she moves back to her home town in the Goulburn Valley area of Central Victoria.

In closing, I thank the entire community for the privilege of leading this wonderful organisation. We look forward to sharing the stories of our region over the next few years. We also look forward to less tumultuous times so we can support, share and sustain each other, the way that the South West does best.

David McIntyre
Chair



About *us*

Vibrant, sustainable communities were part of Josie Black's vision for south west Victoria. She was a community leader and a strong advocate for education and training, health, regional tourism, arts and youth development. Her vision and commitment drove the establishment of the South West Community Foundation in September 2007. In September 2007, the then Governor of Victoria, Professor David DeKretser, together with our founder, Josie Black, officially launched the Foundation.

South West Community Foundation supports charitable activities in the community of south west Victoria. It provides a way for ordinary people to support and invest in the future of their community.

The Foundation has four Trust Funds: the Public Fund, Open Fund, Scholarship Fund and Disaster Relief Fund. All except the Open Fund are recognised as Deductible Gift Recipients (DGR) funds by the Australian Taxation Office meaning that donations can be claimed as tax exempt. All four are also Income Tax Exempt Funds (ITEF), this means the income from our investments is tax free and is returned to the community through our annual community grants.

The Foundation is structured as a public not-for-profit company limited by guarantee.

Our *vision*

Stronger
Community

Our *mission*

To foster a culture of giving to
strengthen the communities of
South West Victoria

Our *region*

Colac-Otway • Corangamite
Glenelg • Moyne • Southern
Grampians • Warrnambool

Meeting our objectives in 2019-20

The objectives of the South West
Community Foundation are to:

- Build a permanent and resilient fund in our region currently at \$1.76 million dollars at 30th June
- Manage investment funds prudently to maximise returns to the community – investment income \$114,207 from dividends, credits, interest and distributions
- Provide a simple and cost effective way for people to invest in their communities future - \$14,046 received in donations
- Distribute to the community for charitable purposes - \$107,581 between 33 organisations and projects

Our value proposition

Local giving for local needs

A permanent fund, built and operated by our community, working to support and strengthen our region.

- We have local knowledge and understand local needs
- We listen and are solution focused.
- Our fund is permanent as insurance for the future.
- We have strong governance and financial management structures.
- We build a better future with your donations.



Governance

South West Community Foundation Board of Directors, volunteer their time and skills to the Foundation. Directors for 2019-2020



David McIntyre
Chair



Gareth Colliton
Deputy Chair



Richard Zerbe
Treasurer



Barrie Baker
Chair



Brian Trotter



Robyn Alexander



Angie Paspilaris



Doug Parker



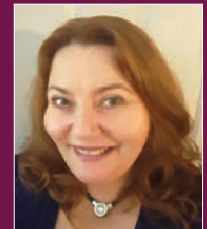
Dr Laurel Myers



Edith Farrell



Carole Reid



Karen Norris
Executive Officer

Advisory committees of the Foundation

The Board has established **Advisory Committees** for its larger regional funds. These Committees are responsible to the Board for:

- Assisting with fundraising for their specific region
- Promotion of the Foundation in those regions
- Recommending grants to be made in their areas of activity

Colac Advisory Committee Membership:

Director – Robyn Alexander (Chair), Mary Stinchcombe, Leah Meade, Melanie Duve, Jess Brauer, Tony Hermann.

Koroit and District Advisory Committee Membership: Director – Brian Trotter (Chair), Lorraine Mielnik, Andrea Lane, Jim Madden, Tim McNally, Leon Carey

Greater Hamilton Development Group Membership: Director – Gareth Colliton (Chair).

Committee: Peter and Bronwyn Dwight, Helen and Tony Henry, Brad Henderson and Mark Brian.





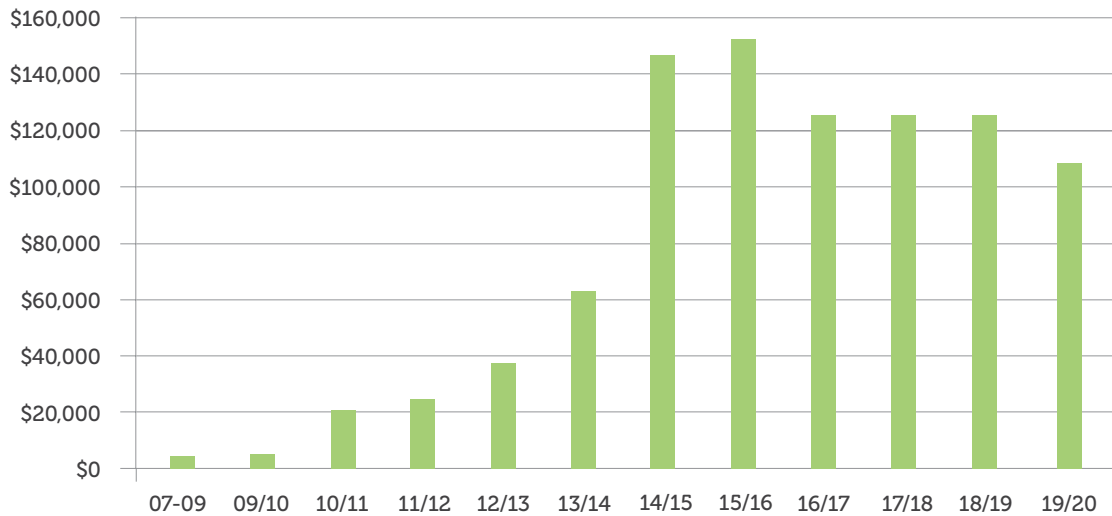
Granting

Granting Report

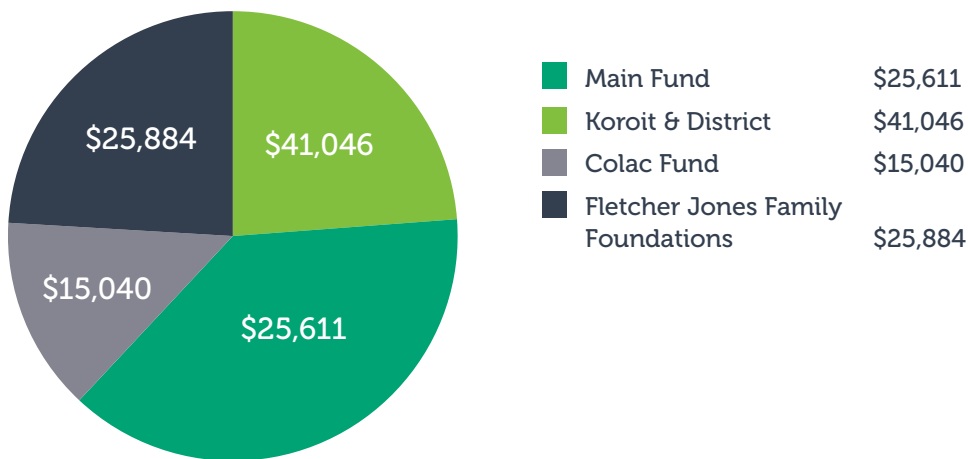
The 2019-2020 financial year has seen the Foundation make grants in excess of

\$107,581

Total Annual Granting since 2007



2019-20 Source of Granting Funds



Total grants from the Foundation to the south west community since 2007 is now over

\$990,000



The following tables show the breakdown of where the funds were distributed in the region and in what focus areas the projects were based on as well. Having this information assists the Foundation in looking at focusing more support in certain areas and regions into the future.

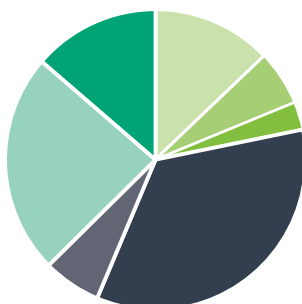
Where the Grants go!

SWCF Breakdown of Focus areas from 2007-2019



- Small community
- Environmental
- Social Development
- Disability
- Children & youth
- Health
- Indigenous
- Arts/culture

SWCF Region Granting Breakdown 2007-2019



- Colac
- Corangamite
- Glenelg
- Moyne
- Southern Grampians
- Warrnambool
- SW Region



2019-20 Granting Round

South West Community Foundation Main Fund

<i>Applicant & Project Name</i>	<i>Amount</i>
Backpacks 4 VIC Kids	
Children displaced in SWVIC supported	\$5,000.00
Carpentait Public Hall	
Automated External Defibrillator funding	\$3,000.00
Hamilton-Coleraine Rail Reserve Committee Inc.	
Tow the Rotowiper!	\$4,000.00
Portland Community Mealshare	
Chooks 4 Cooks	\$2,386.00
South West Alternative Medium Project	
Keeping Us Warm	\$3,225.00
Warrnambool & District FoodShare	
School Fresh/Staple Foods Guarantee Project	\$3,000.00
Leadership Great South Coast	
Annual Scholarships	4,000.00
Camperdown & District Community House Inc.	
Camperdown & District Food Bank	\$1,000.00
TOTAL	\$25,611.00

Koroit & District Fund

<i>Applicant & Project Name</i>	<i>Amount</i>
Lions Club of Port Fairy-Belfast Inc	
Lions Liberty Swing Project	\$5,000.00
Members of exercise class Koroit hospital (Auspice Moyne Health)	
Extra equipment purchase	\$2,000.00
Mosswood Wildlife Inc.	
Koala Shelter Improvements	\$4,322.00
Port Fairy Golf Club	
Defibrillator	\$2,100.00
Port Fairy Golf Club	
On Par – Mental Health Check in	\$2,500.00
Port Fairy to Warrnambool Rail Trail Inc.	
Saving the Goods Shed	\$3,500.00
Port Fairy Women on Farms Gathering (WoFG)	
Women on Farms Gathering-2021	\$4,000.00
Warrnambool and District Community Hospice	
Building Death Literacy in Moyne Shire	\$5,000.00
Warrnambool & District FoodShare	
School Fresh/Staple Foods Guarantee	\$2,000.00
RSL Active Warrnambool	
Community Engagement	\$2,524.00
South West Healthcare	
Palliative Care Carer Support Program	\$4,600.00
Woorndoo Land Protection Group	
Showcasing Our Local Wildflowers	\$2,500.00
Commonwealth Championship Sheepdog Trials Inc	
Commonwealth Championship Sheepdog Trials Inc.	\$1,000.00
TOTAL	\$41,046.00

Colac Fund

<i>Applicant & Project Name</i>	<i>Amount</i>
Alvie Consolidated School	
Sustainable Community Wellness Garden	\$3,740.00
Colac Maker's Space inc.	
Young Colac artists with big dreams	\$2,300.00
Community Hub Inc	
Community Edible Garden	\$4,800.00
Otway Conservation Association	
Apollo Bay Community Composter Garden	\$4,200.00
TOTAL	\$15,040.00

Fletcher Jones Family Foundations

<i>Applicant & Project Name</i>	<i>Amount</i>
OzFish Unlimited	
Fish Habitat in the SouthWest	\$4,000.00
Port Fairy Community Group Inc.	
'Grow Free' Food Cart Shelter	\$3,384.00
Port Fairy Adventure Film Festival	
Carbon Positive Festival	\$4,000.00
The Friends of St Brigids Association Inc.	
Installing a stage platform at Crossley	\$4,000.00
The F Project	
Welcoming Entrance	\$2,500.00
Warrnambool East Primary School	
W.E.P.S Community Crew Parent Engagement	\$3,000.00
Warrnambool Theatre Company	
Increasing capacity of theatre community	\$3,000.00
Warrnambool Toy Library	
Sustainable Play for South West Kids	\$2,000.00
TOTAL	\$25,884.00

TOTAL GRANTED FOR 2020 =
\$107,581

Major Donors & Supporters

Volunteers

The Foundation sincerely thanks all of this year's volunteers for their support. Volunteers work with the Foundation to organise fundraising events, encouraging work place giving programs, serve on Foundation Committees and assist with raising awareness of the Foundation's activities.

Named Memorials

The foundation is pleased to recognize Named Memorials of donations of at least \$10,000.

The existing Foundation memorials are:

Phyllis Gough Memorial

Established in 2013 Phyllis Gough is remembered for her generous support of children in Hamilton and district.

Kate Armbruster Memorial

Established in 2012 Kate Armbruster is remembered for her support of environmental issues, community music and the needs of young people.

Josie Black OAM Memorial

Established in 2010 Josie Black OAM is remembered as the driving force behind the establishment of South West Community Foundation. Josie was actively involved in education and training, health, regional tourism, arts and youth development.

Frank Paatsch Memorial

Established in 2009 Frank Paatsch is remembered for his generosity and strong connection to the Colac community.



Named Benefactors

The Foundation's Named Benefactors, both individuals and organizations have donated a minimum of \$10,000 to the Foundation.

Robert and Louise Manifold 2007

Robert and Louise wished to support the local geographic area and wanted to help people who live in South West Victoria.

Paatsch Family

The Paatsch family continue to support people who live in the South West community, especially in the Colac Region.

Felicity Melican

Felicity's commitment to this region is not only highlighted by her contributions to the Foundation but also her involvement in many other regional Foundations.

Manintveld Family

A family with great interest in the Colac Region and supporting positive outcomes through the Foundation.

Mr John Gall

Mr Gall has been a great contributor to the Foundation and the South West region.

Dr. Geoff Handbury AO

Dr. Handbury has been a great contributor ensuring support in the Greater Hamilton region.

Jigsaw Farms

Jigsaw Farms have contributed to the Foundation due to their interest in supporting communities within the Hamilton region and all of the South West.

Sponsors

We extend our thanks to all the individuals and organisations that sponsor us, including but not limited to:

South West Credit
Moyne Shire Council
Warrnambool Cheese & Butter
Mortlake Butchers
Telstra Country Wide
Northeast Stockdale and Leggo
Colac Taxis
Cooper Hardimann

The local media for helping us tell our stories:

Ace Radio
ABC Regional
WDNnews Colac Herald
Hamilton Spectator
Hamilton Times
Warrnambool Standard.
Moyne Gazette
Portland Observer
OCR FM (Community Radio)

Major Sponsor

Sinclair Wilson

The Foundation is grateful for the ongoing support of Sinclair Wilson with the provision of pro-bono financial services and investment advice. In particular, the Foundation recognises the contribution of Felicity Melican, Warren Easley, Adam Dickson and Beryl McLeod in providing these services.

Partners

We extend our thanks to all the individuals and organisations that are our partners including:

Starprinting
South West Credit Union
Brophy Youth and Family Services

Major Partners

South West TAFE

The Foundation could not run our operations without the ongoing support with the South West TAFE and wish to specifically thanks Natasha Wilkinson and her team.

Ace Radio - Coast FM

The Foundation has received great ongoing support from Peter Headon and his team including Lindy Watson at the Warrnambool office.

Workplace Giving

We are very pleased to announce that Colac Otway Shire have joined our workplace giving program in 2019-2020. We would love to add more workplaces in 2021, find out more at

www.southwestcommunityfoundation.org

Granting Partners

Isobel and David Jones Family Foundation
Niall Foundation

Once again, the Foundation is truly grateful for the key partnership with these Foundations in the provision of granting funds this year and are looking forward too many more years working together to support the south west region.





Donate now...

Please go to our website

www.southwestcommunityfoundation.org



Back to School

This year the Foundation distributed 390 vouchers each worth \$50 for allocation to young people across 61 schools in the south west. The total value of the vouchers distributed is \$19,500. The schools involved are both primary and secondary schools spread across the whole of the south west's six municipalities.

The vouchers are for uniforms, shoes and other school requisites. They are allocated on the advice of the schools to students from families that are finding it financially tough keeping their children properly set up for school.

The Foundation again wishes to thank the Foundation for Rural & Regional Renewal (FRRR) and the Fletcher Jones Family Foundation for their generous support in the provision of these vouchers along with our Foundation.

Feedback received from Principals:

- Thank you to the South West Community Foundation and the Fletcher Jones Family Foundation for again administering the Foundation for Rural & Regional Renewal's Education Australia Program. This initiative certainly benefits our rural families and helps ease the financial burden of some education expenses.)
- Once again we thank you for supporting our disadvantaged families in this way. It makes a huge difference.)
- We are grateful for the continued support from FRRR and Fletcher Jones Family Foundation through the SWCF, please pass on our thanks. The vouchers have been so well received in previous years, families really appreciate that little bit of help. It does make a difference with the costs particularly for the larger families with low income.)
- We have received our Back to School Vouchers to support families that are finding it tough financially at the moment. We would like to thank you and your Foundation for this wonderful initiative.)

Some of Our Stories

Over the past decade the Foundation has proudly been able to support and facilitate funding worth over \$990,000. Below are some of the recent project supported and how this funding has assisted their organisation and ultimately their communities.



Basalt To Bay Landcare

The St Helens Landcare group received funds to properly fence off a divide between a nature reserve teeming with vulnerable species and an adjoining Blue Gum plantation.

As the project developed, the Brauer College Hands-On Learning chimed in giving young at-risk men some genuine, practical work experience.

“The project took on a life of its own as the initial seed funding enabled the project to start, thanks to Fletcher Jones Family Foundations and South West Community Foundation. Once organisations started to here about it, other organisations contributed materials, transport, site readiness and the actual work on the day. It became a real whole of community effort and the great outcome is that the wildlife habitat in the area is flourishing”.

Lisette Mills – Basalt To Bay Landcare.



Wyndinia Kindergarten and Early Learning Centre

A South West Community Foundation – Colac Otway Fund grant enabled a local artist to turn a functional fence into a unique piece of indigenous art.

“The mural has added a finishing touch to the playground and is reflective of the local indigenous community. A focus of the kindergarten and early learning centre has been raising the awareness and profile of the aboriginal community in both the curriculum and day to day activities at the service.

Staff, children and the families have increased their understanding and knowledge of the local culture. The local artwork is something to be admired and has encouraged conversations and curiosity between staff and children”.

Julie Molloy – Manager Early Years Care and Community.



Cycling Without Age – Port Fairy

In partnership with Fletcher Jones Family Foundation, we were able to support a Leadership Great South Coast project – Cycling Without Age, Port Fairy

“The excitement, the joy and the endorphins flowing that come from getting out and about is of real health benefit....

That chance to have inter-generational connections through shared stories and a conversation. It’s very much about sharing a moment. The support we received through the South West Community Foundation has really helped us. When you’re a small community organisation, you really are looking for an organisation to back you and to see these things off the ground”.

Brendan Donahue – Cycling Without Age/LGSC

Some of Our Stories

continued



Worn Gundij – Tower Hill

Following on from a 2018 grant for outdoor furniture, the South West Community Foundation again supported this important cultural and geological place.

“We employ members of the local aboriginal community..... We are particularly trying to promote the tours we do here, on top of that we try to educate people about the aboriginal history.....about the importance of looking after the land and the native wildlife that live here. We receive no other funding so we must stand on our commercial returns..... and the help provided by the South West Community Foundation has really helped enhance the place To give people an experience they can take home and really remember”

Terry O’Keefe – Tower Hill Visitor Centre

Project Spotlight



Cycling Without Age

<https://vimeo.com/394389222>



Worn Gundij - Tower Hill

<https://vimeo.com/378719984>



Leadership Great South Coast

<https://lgsc.org.au/photo-gallery/>



Camperdown Foodshare

Based at Camperdown Community House, the Foodshare service ensures that those in need won’t go hungry when the chips are down.



Eat Up Colac

A dedicated group of volunteers making sure no child goes hungry at school lunch time.



Backpacks for VIC Kids

Families fleeing domestic violence often do so in the middle of the night with almost no possessions. Backpacks for VIC Kids provides a comforting and usable array of goods to hold onto in their time of need.

Financial Statements are presented unaudited at the date of Annual General Meeting

Finances

For the year ended 30 June 2020

The full audited statement will be available at
www.southwestcommunityfoundation.org upon completion
 or by contacting the Foundation
info@southwestcommunityfoundation.org

	30-Jun-20	30-Jun-19
STATEMENT OF COMPREHENSIVE INCOME		
INCOME		
ATO Cash Flow Boost	10,000	0
Dividends Received	60,508	78,885
Donations Received	14,046	11,526
Fundraising	0	2,645
Gain/(Loss) on Disposal of Investments	0	12,297
Grants Received	50,383	1,500
Imputation Credits	22,552	30,805
Interest Income	3,522	4,384
Job Keeper	3,000	0
Sponsorship	0	500
Sundry Income	1,544	1,991
Trust Distributions Received	31,147	22,426
TOTAL INCOME	196,702	166,959
EXPENSES		
Administration Expenses		
Advertising and Marketing	4,780	4,485
Bank Fees and Charges	187	11
Consultancy Fees	1,268	1,510
Depreciation	201	570
Fundraising Expenses	1,259	1,989
Grants Paid	132,567	81,258
Insurance	2,446	2,443
Movement in Leave Provisions	-436	2,381
Printing and Stationary	3,249	3,716
Professional Fees - Accounting and Audit	1,100	1,080
Staff and Board Training and Development	722	0
Subscriptions and Memberships	2,732	2,475
Sundry Expenses	1,362	4,654
Superannuation	4,334	4,510
Telephone and Internet	579	791
Travelling and Meal Expenses	2,206	6,861
Wages and Salaries	45,619	47,477
TOTAL OPERATING EXPENSES	204,175	166,211
Movement in Market Value of Investments	-327,536	52,762
COMPREHENSIVE RESULT	-335,010	53,509
BALANCE SHEET		
CURRENT ASSETS		
Cash and Cash Equivalents	262,545	265,891
Receivables	22,552	30,805
Shares in Listed Companies	1,474,349	1,798,314
Sundry Debtor	999	0
TOTAL CURRENT ASSETS	1,760,445	2,095,010
Non Current Assets		
Plant and Equipment	3,705	3,705
Less Accumulated Depreciation	-3,606	-3,405
TOTAL NON CURRENT ASSETS	99	300
TOTAL ASSETS	1,760,545	2,095,310
LIABILITIES		
Payables	3,814	1,850
Employee Provisions	3,069	4,790
TOTAL LIABILITIES	6,883	6,639
NET ASSETS	1,753,662	2,088,672
DISTRIBUTION OF ASSETS BETWEEN FUNDS		
General	566,005	568,852
Colac Otway Fund	386,761	386,761
Koroit and District Fund	1,050,183	1,050,183
Greater Hamilton Fund	77,929	77,929
Education Fund	4,825	4,825
Disaster Relief Fund	2,969	122
less Current Year Earnings	-335,010	
Distribution of Assets by Tax Status		
Public Funds (tax deductible for donors)	440,306	598,410
Open Funds (not tax deductible for donors)	1,308,408	1,485,314



Trust Funds of the Foundation

There are four Trust Funds that together make up the Corpus of the Foundation. Income from this Corpus in turn provides the basis for the Foundation's granting to charitable activity within the community.

The four Trust Funds are:

SWCF Public Fund – a fund able to accept tax deductible donations and make grants to ATO registered Item 1 DGR (deductible grant recipient) charitable organisations.

SWCF Open Fund – donations are not tax deductible but grants can be made to any charitable activity or organisation.

SWCF Disaster Relief Fund – donations to this fund are tax deductible and grants can be made to individuals or organisations who are suffering as a result of a Declared Disaster.

SWCF Scholarship Fund – can receive tax deductible donations and make grants to individuals provided that certain nominated requirements are met.

SWCF allocates donations and income received to one or more of the Trust Funds, and where requested to one or more Managed Sub-Fund Accounts. Donors may nominate both the Trust Fund and the Managed Account:

The Managed Sub-Fund Accounts include:

- SWCF Colac Region Fund
- SWCF Koroit and District Fund
- SWCF Greater Hamilton Fund

Named Memorial, and Named Benefactors donations may nominate to have funds in any or all of the Trust Funds and Managed Accounts. The Foundation's General Fund and Sub-Funds seek to have investments in both the Public Fund and Open Fund to increase the flexibility of granting.





Contact the Foundation

South West Community Foundation

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ABN: 86 123 792 441

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