



**FOUNDATION
BAROSSA**

Giving Today to Enable Tomorrow

**BAROSSA REGION
COMMUNITY FOUNDATION**

www.foundationbarossa.org.au



**ANNUAL
REPORT**

2016



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Message from the Chair

Dear Friends,

2015-2016 was another busy year and one of significant corpus & project growth for the Foundation, finalising and launching a number of new Education scholarships and Funds, in addition to the distribution of funds through the annual Community Grants and Back to School Voucher projects.

New Education Trust Scholarships launched this year include:

Elderton Winemaking Excellence Scholarship providing \$3,000 for one year to a Bachelor of Oenology student with Vintage placement and mentoring.

Concordis Wine Industry Traineeship providing \$10,000 over two years, to two Trainees undertaking TAFE training & employment with the four Concordis Wineries.

Kicking Goals Scholarship providing \$3,500 over 3 years to secondary students with a physical disability to support completion of secondary schooling and first year of tertiary studies, which replaces the Stump Jump.

Barossa Brass Bands Scholarship providing up to \$750 for one year for two secondary school music students with mentoring by local Brass Bands.

The Forge Mentor Programme was launched in 2016 to provide all scholars the opportunity for access to a mentor throughout the course of their studies. A significant contribution by Board member Lesley Ann Grimoldby to establish and manage this initiative.

The Foundation undertook Community Consultation, at the Community Co Op, on 27/8/15 to garner feedback about community issues and promote the Foundation, which identified Youth issues as a major concern.

On February 2nd 2016, 60 people attended our Community Information evening held at The Clubhouse, Tanunda, at which the Foundation presented the 2016 Scholarships and provided the community with an update of Foundation Barossa projects including Pinery Fund, Community Grants and Friends of the Foundation. I give heart-felt thanks to our EO, Leanne Hutton, who admirably took over the reigns and did a brilliant job, at short notice, in my sudden absence and to the support of her by Lesley Ann and Graeme.

As at June 2016, the Foundation's administrative funds remain at a healthy \$22,000 thanks to the generous support of our Sponsors: Barossa Valley Cider Company, Homburg Real Estate and The Clubhouse. We are indebted to these businesses for continuing their support of our Foundation, to enable us to do our work.

Again, I wish to thank Fuller Communication for their generous & ongoing 'in kind' sponsorship of the Foundation Barossa website. I would also like to thank Kodo Barossa for helping source & set up our Foundation laptop. This year Rivergum Homes also donated \$2144 from their Barossa Staff Charity Day held April 2016.



**Anita Bowen, Board Chair
Foundation Barossa**

The Foundation Board has, since inception, set itself apart from many other charitable organisations by stipulating & guaranteeing that 100% of donations are invested and not used for administration. Hence why Foundation Barossa is reliant on our philanthropic business partners, sponsors & donors.

Foundation Barossa reached a major milestone this financial year, with corpus funds exceeding \$1million.

I would like to thank Board member and Treasurer Karl Martin for his great work, along with Scott Tolhurst, as our Finance Sub Committee, in managing our funds to maximize returns, provide considered advice & reports to the Board and assisting our Executive Officer with day to day financial matters.

This has become a time consuming role, as our funds have significantly increased, and with that, the demands to manage these funds to produce income so we can meet our commitments to give back to our community, and so, I thank you both for your expertise, dedication, time and effort in this regard.

A special mention to retiring Board member Brian Phillips, Secretary (and Public Officer), who I believe has done a stellar job managing all the demands of his Secretarial role with great aplomb, incisiveness, attention to detail, and humanity, for the past years. I have greatly appreciated Brian's intelligent, considered and calm advice and I thank him for being such a great support to me and contributor to the Board.

Thank you!

Anita Bowen

Mission

Foundation Barossa is a Community Foundation which encourages philanthropy and provides a vehicle through which the community can help the community - forever.

Programs



Scholarships

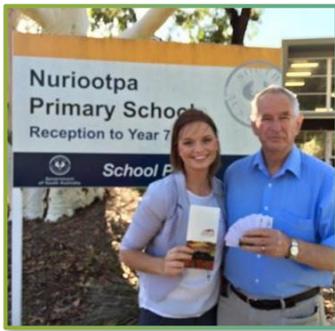
Scholarship applications continue to grow, as do the number of scholarships available to students. In the coming years' we will be offering new scholarships for high school students, including:

**Over
\$250,000 in
scholarships
have been
awarded to
date.**

- Kicking Goals scholarship, supported by John Hughes & Reislingfreak to encourage disabled students to pursue tertiary education or full time work.
- The Barossa Bands Scholarship supported by the Nuriootpa and Marananga Brass Bands to support music students and encourage participation in local brass bands.

Current scholars across all Foundation Barossa scholarships are listed below.

Name	Scholarship	Year commenced	Year completing
Semra Aksarkali	Cellarmaster	2014	2016
Lena Stoll	Cellarmaster	2015	2016
James Fox	Thomas	2014	2016
Morgan Leske	Thomas	2016	2016
Elenore Arthurson	Cellarmaster	2014	2017
Jackson Jaensche	Cellarmaster	2015	2017
Nathan Evers	Concordis	2016	2017
Ashby Schilling	Thomas	2015	2017
April Zimmermann	Cellarmaster	2016	2018
Raf Thomson	Cellarmaster	2016	2018
Thomas Darmody	Elderton	2016	2018
Sam Rogers	Elderton	2017	2018
Deanna Kerr	Thomas	2016	2018



Back to school vouchers

In 2016 two hundred back to school vouchers were distributed through the program administered by the Foundation for Rural and Regional Renewal (FRRR). The vouchers were distributed across 22 schools within the Greater Barossa region. Feedback on the program was again positive with local businesses through the Co-op also assisting with the program. The Foundation will continue to support the program in the future.



Community Grants

Our annual community grants program distributed a total of \$5000 to three projects.

- Nuriootpa Uniting Church - Breakthrough Programme
- Youth Barossa Inc.
- Barossa Community Labyrinth

To assist funding small grants project in the future a new regional fund will be established by FRRR to allow Foundation Barossa to fund projects quickly and more efficiently.



Pinery Bushfire Recovery Appeal

The development of the Pinery Bushfire Recovery fund saw the donation of over \$50,000 to June 2016. The development of the fund came quickly following the fires and was coordinated by Leanne Hutton and FRRR. This allowed over 50 individuals and organisations to donate to the appeal – the majority of which did so the month following the fires. Donations have continued to flow directly to the Foundation since April 2016.

Discussions have been had throughout the year with the Bushfire Recovery Centre in Gawler regarding projects to donate the funds to. Currently a number of worthy projects have been identified across the fire affected region for funding.

Funds from the appeal will be distributed by Foundation Barossa as soon as possible to assist in the recovery of communities in the coming months leading up to the anniversary of the fires.

Our impact - Scholarships

Each year Foundation Barossa, in conjunction with our major supporters and donors, provides education scholarships for students from the Barossa Region. Scholarships are provided to students entering university and those undertaking further education through TAFE or traineeships, as well as some specialised scholarships for students studying in the final years of high school. A total of 22 students from the Barossa Region have been recipients of these scholarships since 2008.

Each scholarship provides funds to enable students to focus on their studies and can be used in a variety of ways to assist in funding upfront education costs for travel and study materials. Some scholarships also provide assistance with living costs to allow tertiary students to live out of home whilst studying at city campuses.

All Foundation Barossa scholarships are funded through donations from businesses and individuals in the Barossa region. All funds donated to the Foundation Barossa Education Trust go directly to assist in providing perpetual scholarships for students from the region.

Further information about each scholarship can be found on the Foundation Barossa website:

www.foundationbarossa.org.au



Deanna Kerr
Thomas Scholar, 2016

Deanna Kerr

In 2016 Deanna commenced a Bachelor of Law and Development Studies at the University of Adelaide.

A graduate of Nuriootpa High, Deanna was raised in a family steeped in the traditions of the Barossa Heritage.

“Being awarded the Thomas Scholarship will undeniably change my life as I could complete tertiary education with the confidence of knowing that the costly educational fees and my financial situation would not threaten my ability to reach my goals.

It is hard to believe the first semester of uni has been and gone. I am loving studying and cannot wait to see what is in store for the next few subjects.”

As part of her scholarship, Deanna is also taking part in the Forge Mentorship program with regular meetings with her mentor Gillian Standen-Thomas.

“Thank you for setting me up with my mentor, Gillian, she has been fantastic. The opportunity to be mentored by a local professional throughout my studies is invaluable in establishing the local connections I would to facilitate my ambition to improve the lives of fellow Barossa residents.”

**Education
Trust
distributions
increased
31% to
\$46,490 in
2016**

Our impact – Bushfire Appeal

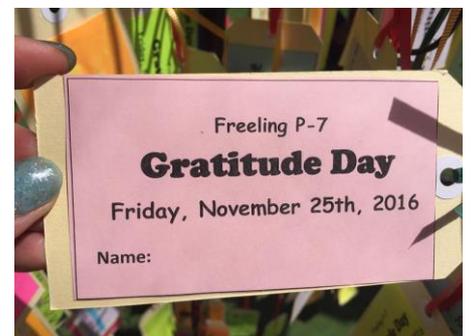
In response to the Pinery Bush Fire, 25th November 2015, the Foundation raised over \$50,000 for medium term recovery projects, to be assessed and disbursed in conjunction with the Pinery Fire Recovery Centre, Gawler. Thanks to Board Member Graeme Longmuir for overseeing this project, to FRRR for assisting in the development of the donation account and to the staff at the SA State Recovery Centre for their assistance.

Wasleys Community Centre - \$15,000

The Wasleys Supper Hall has been an invaluable community asset since the Pinery Fire. Used as the local Recovery Centre immediately following the fire it has not only providing access to physical goods such as food and clothing but also a space for people to come and have a cup of tea, and a chat if that's what they needed. The Supper Hall is also used on a weekly basis by the Mums and Babes and Coffee and Chat groups and by Creative Chatters - a group that was formed post-fire to assist, especially women, recover from the fire. Funds from the bushfire appeal will go towards installation of an air conditioning unit to enable groups to continue to use the Hall comfortably all year round.

Freeling Primary School - \$2,000

Following the Pinery fire, staff and students at Freeling Primary School have created a series of mosaics with images celebrating the Freeling Community. The project has involved staff, interested students and members of the community. This project will assist with the ongoing recovery from the Pinery Bushfire. The project is developed by the community and assists in developing resilience and support networks within the community.



Landscape Greening Project - \$5,000

Members of Owen Uniting Church, through the Landscape Greening Project are visiting each and every house across the full area of the fire impacted region to hand out vouchers to restore gardens. Starting with individual and church donations the group began where the fire started and have moved eastwards to enable families who saved their homes, but lost everything else to establish new gardens.

Financial Management

The financial position of Foundation Barossa and its capacity to support community needs continues to improve, as evidenced by the graph below. Total fund balances as at 30th June 2016 total \$1,048,595, up from \$788,726 the previous year. The increase in fund balances has been achieved from broad increases across most sub funds, with Concordis (Education Trust) being a significant driver along with the addition of the Barossa Junior Band sub fund (Public Fund). Realised and unrealised investment gains also contributed a further \$29,780 (net of fees).

Strategy Information

Foundation Barossa engage the professional services of Godfrey Pembroke to provide advice (pro bono) on investment strategies and assist with the management of a growing corpus.

The Foundation adopts investment strategies to meet the following objectives:

- Preserve capital base
- Receive regular income
- Provide reasonable exposure to long term capital growth.

The Foundation as a trustee of the fund, and their advisor will exercise the same degree of care, diligence and skill that a prudent individual would exercise in managing the affairs of others. Investments will be maintained according to a “Conservative Growth” risk profile defined as holding 45-55% of the market value of the fund’s net assets in defensive assets (cash and fixed interest) and the other 45-55% in growth assets (Australian and international equities and property).

Total funds under management at 30th June 2016, excluding Bank SA accounts, was \$535,458 with unrealised gains of \$17,678.

Income, Distributions & Expenditure

Total income from 2014/15 was \$329,227, up from \$284,042 the previous year.

Distributions of \$51,016 were down \$7,194 on prior year due to the passing through of funds of \$17,710 for the Eden Valley bushfire appeal in 2014/15. Pleasingly, the Education Trust distributions increased 31% to \$46,490, up from \$35,500 the previous year.

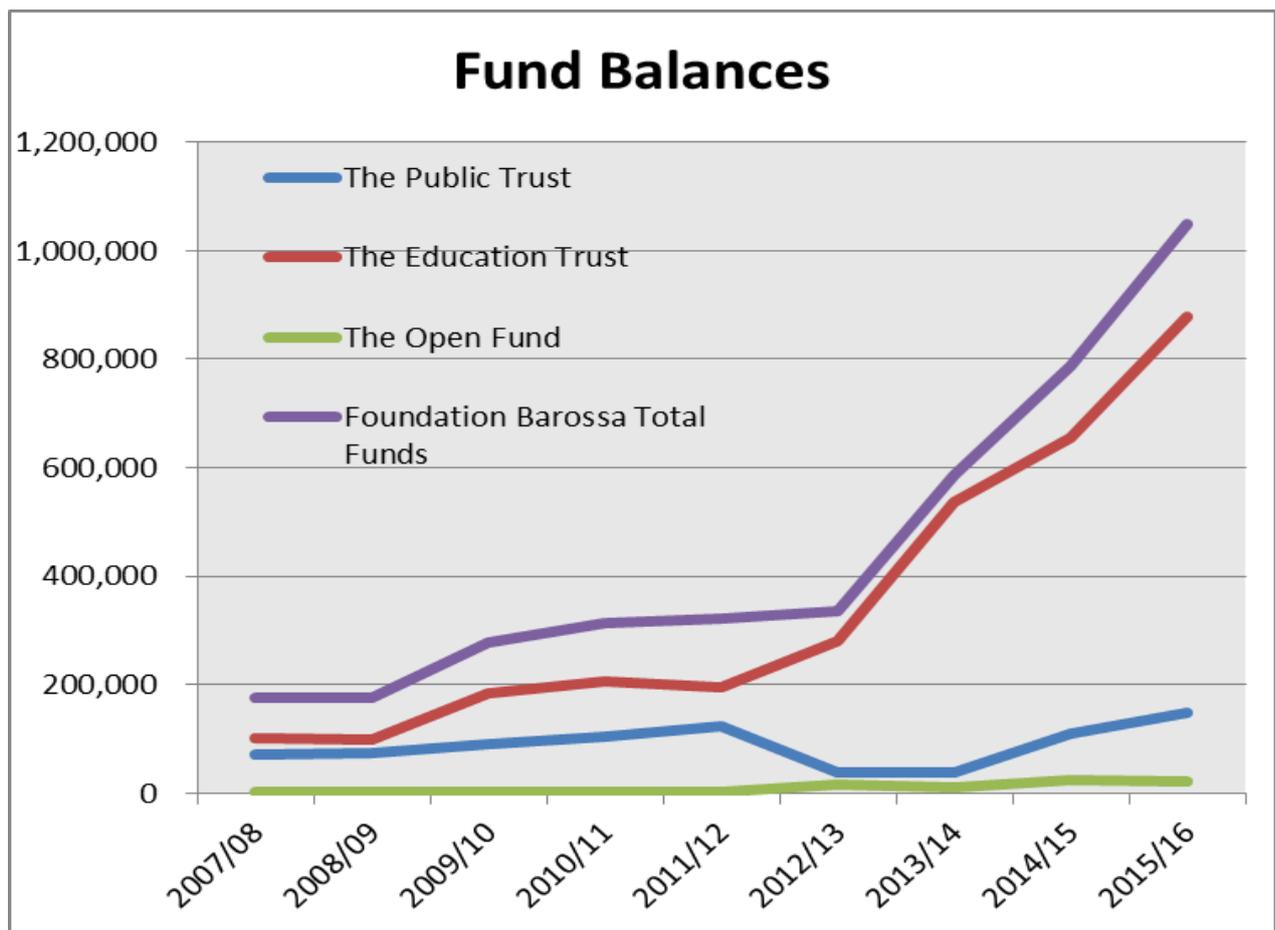
Total expenditure of \$29,283 was below previous year of \$30,542, with operating expenses remaining steady around \$30,000 p.a. over the last 3 years.

Sub Fund Balances

There was an increase of \$259,869 across all sub funds, driven predominantly by the Concordis sub fund +\$173,376 and the addition of a new sub fund, the Barossa Junior Band +\$30,000.

Recently established sub funds for CoOp, Cellarmaster, Elderton and Peter Lehmann continue to grow, while the balance of the Stump Jump funds will be refocused under a new initiative called “Kicking Goals” which received further funding in June 2016.

The Open Fund closed with a year-end balance of \$17,701. Targeted sponsorship and ongoing support from sub funds is critical for Foundation Barossa operations to remain sustainable. This will continue to be a focus to ensure annual operating expenses of \$30,000 - \$40,000 can be funded from specific sponsorship in order to preserve the corpus.



The graph (above) shows the balance of each sub-fund administered by Foundation Barossa.

Looking Forward

2015-16 saw the development of some of the newer projects such as the Peter Lehmann Trust and the Concordis traineeship. The achievement of our \$1 million corpus also gives us an opportunity to look at how we can build on the current success.

In the coming year we will be looking at the development of the organisation to enable us to build on the current projects and potentially open up avenues for greater opportunities for both ongoing funding and increased community support.

Currently there are a number of organisations and individuals interested in assisting and working with Foundation Barossa. There is however a limited suite of information that we can supply to assist the building of these relationships and no formal communication processes. By developing our marketing and information collateral we can showcase the work of the organisation to date and provide information for new potential partnerships.

Development of formal lines of communication for sponsors and supporters is a key path to maintain and develop our relationships enabling the Foundation to become more sustainable. Communicating our successes to the wider community will also increase the number of applicants for scholarships and increase the profile of both the Foundation and other community groups that are benefitting from the Foundations works.

Executive Leadership

The Foundation Barossa Board is made up of highly skilled and dedicated volunteers. Three new members will be added to the Board in 2017 to fill current vacancies and replace retiring member Brian Phillips who leaves us at the end of 2016 after a number of years as secretary.



Anita Bowen
Board Chair



Brian Phillips
Secretary



Lesley Ann Grimoldby
Board Member



Greg Arthurs
Board Member



Graeme Longmuir
Board Member



Karl Martin
Treasurer



Scott Tolhurst
Board Member

We Need Your Help

There are many ways that you can support the work of Foundation Barossa.

Donate to a scholarship

You can donate directly to the Foundation Barossa Education Trust or to a specific scholarship or appeal.

To donate visit the donation page on our website at www.foundationbarossa.org.au and click on the “How to Give” link.

Make a bequest

By making a bequest you can enable the creation of a specialised perpetual scholarship, or assist in the funding of our organisation.

Become a friend

Anyone can become a Friend of Foundation Barossa. Through a simple annual membership fee you can support the work of our organisation.

Volunteer and Help Make a Difference

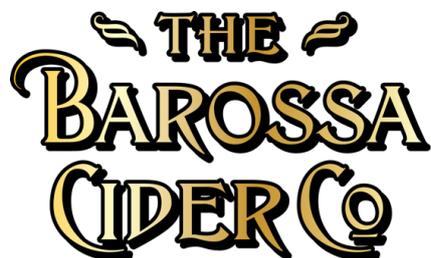
Not everyone can make a financial contribution, but your skills are just as valuable. If you have time to assist us with marketing, administration or finance or perhaps you would like to be part of the Forge Mentorship program? Contact us on info@foundationbarossa.org.au to find out how you can be involved.



Thank You to All of Our Supporters

Foundation Barossa scholarships and administration are supported by a variety of individuals and businesses from the Barossa region. We would like to thank all those who support our organisation including:

Sponsors and supporters



Scholarship major donors

Barossa Bands Scholarship



Cellarmasters Scholarship



CELLARMASTERS



Concordis Traineeship



TORBRECK
BAROSSA VALLEY



TWO HANDS WINES

Elderton Scholarship



Kicking Goals Scholarship



Peter Lehmann Arts and Education Trust



Thomas Scholarship





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www.foundationbarossa.org.au

Connect with us!

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