



FOUNDATION BAROSSA

2018

Annual Report

"giving today to enable tomorrow"

Mission

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



Foundation Barossa Board - 2018

Front: Lesley Ann Grimoldby, Lisa Laycock, Nick Slape, Chairman; Kylie Piper, Executive Officer; Angela Pickett.

Back: Anthony Grundel, Karl Martin, Annemaree Clementson, Craig Grocke and Trish Colbey.

Absent: Greg Arthur and Scott Tolhurst.

Image courtesy The Barossa Mag.

Message from the Chair



Dear Friends,

It has been another big year for Foundation Barossa, with the consolidation of the Peter Lehmann Arts and Education Trust (look out for the first grant applications, closing end-October) and several changes to the Board. This included the departure of Anita Bowen, after six years as Chair of the Foundation. Anita's energy and foresight and thoughtful approach to building capacity has been so important to the health and vitality of the Foundation and my colleagues on the Board and I are very grateful for her contributions.

The original vision behind the Foundation was to encourage philanthropy and provide a vehicle for Barossans to build a sustainable financial asset. Invested funds would be used to nurture our community, providing opportunities for community groups; for those less advantaged; for young people starting out; and to contribute to the health and preservation of our heritage and environment.

This past year has seen a number of projects and activities deliver on the promise. These include:

- The completion of the Pinery Bushfire Appeal grants process, with just over \$47,000 distributed to communities affected by the fires.
- \$5,000 delivered to programs through Community Grants bringing the total distribution of our grants to the community to over \$35,000.
- Awarding of the first Barossa Bands scholarship funded by the Nuriootpa Brass Band and the Marananga Brass Band.
- Allocation of funds through the scholarships program reaching over \$350,000.
- Establishment of the Peter Lehmann Arts and Education Trust.

The Foundation remains committed to ensuring that all donations are invested and all income from those investments is distributed to the community or reinvested for the future. Despite a growing pool of funds and accompanying activity, and the work involved in managing this, Foundation Barossa funds administration costs separately. I would like to acknowledge those philanthropic business partners, sponsors and donors who contribute directly to the Foundation's operating expenses, without whom we would be unable to maintain this commitment.

The Foundation's finances are overseen by Board members Karl Martin, Scott Tolhurst and Lisa Laycock and supported by the generous contribution of Mark Williams of Godfrey Pembroke. Their disciplined and prudent oversight has again seen healthy returns for the funds Foundation Barossa has invested.

We have recently farewelled our Executive Officer, Kylie Piper, who has done a great job in managing administration, communications and relationships while keeping the Foundation focused on our core purpose. Kylie's energy, humility and resilience and her commitment to doing the best work she can with limited time and resources has been deeply appreciated.

We are blessed to have several generous partners, offering in-kind support to the Foundation. Fuller continue to provide support for our website; Barossa Council make office space available for the Executive Officer; The Leader is a supportive media partner; and AON insurance brokers provide generously discounted fees. For a community foundation with a shoestring budget and a commitment to making every donated dollar count, the support provided via these relationships is invaluable.

I'd like to acknowledge each of the members of Foundation Barossa's Board, all of who volunteer their time and energy and their thoughtful consideration to building capacity and self-reliance within our very special community, and to ensuring the diligent and transparent management of community funds.

Foundation Barossa closes the year in good shape, with a committed Board, a raft of projects in the pipeline and a sense of optimism about the future. All of this hinges on the continued goodwill and support of our philanthropic donors, sponsors and supporters and on behalf of Foundation Barossa, a very big thank you to you all.

Thank you!

Nick Slape



Programs

Foundation Barossa aims to nurture and build our community's strength and assets, by responding to challenges and opportunities and supporting organisations and individuals to do likewise.

SCHOLARSHIPS

In 2018, Foundation Barossa awarded four scholarships, including the inaugural Barossa Bands Scholarship. This scholarship aims to encourage young people to join either the Marananga or Nuriootpa band and provides financial and mentoring support for them to further their musical aspirations.

Three other scholarships were awarded. This year's Thomas Scholarship went to 5th generation future winemaker, Dylan Kalleske, to assist his studies in Oenology and Viticulture. Nathalie Johnstone was awarded the Cellarmasters Scholarship and is studying at the Australian National University in Canberra. Brodie Healy was awarded the second Kicking Goals Scholarship. The scholarship will provide the budding sportsman with financial support for his final two years of school as well as mentorship from Kicking Goals Patron, John Hughes.



Inaugural Barossa Bands Scholarship recipient, Bailey Lobegeiger, with Board member, Lisa Laycock.

BACK TO SCHOOL VOUCHERS

A total of 160 \$50 vouchers were distributed to 40 regional schools in February, with additional funds sourced and distributed to schools affected by the Pinery Bushfires. Foundation Barossa appreciates the support of the Foundational for Rural and Regional Renewal (FRRR) and Brian Phillips who assisted with the distribution of vouchers.

PETER LEHMANN ARTS AND EDUCATION TRUST

The Peter Lehmann Arts and Education Trust (PLAET) was created to fund the ongoing development of Barossa's thriving cultural life.

Since 2017, the advisory committee for the Trust has worked to develop the strategy for the ongoing grant and scholarship program. The Trust corpus has been funded by the Lehmann-Hess Family Trust, the Barossa community and the Thomas Foundation.

The first round of the grants and scholarship program opened in September 2018. The grants are intended to fund artists, musicians and traditional artisans. The scholarship program will also provide support for musicians interested in working with the Barossa Hill and Son Organ.

COMMUNITY GRANTS

Each year Foundation Barossa allocates funds to the Community Grants Program to support community groups throughout the Barossa region.

To date over \$35,000 has been given out to community groups to support a range of projects including community gardens, Barossa history books and driver education for young people. The Community Grants Program is funded through the Foundation Barossa Public Fund.

IN 2018 THREE COMMUNITY GROUPS RECEIVED GRANTS THROUGH THE FOUNDATION BAROSSA GRANT PROGRAM:

YOUTH BAROSSA

The Drive My Future project will assist youth within the Barossa undertake the supervised driving hours needed to gain a licence.

BACKPACKS FOR KIDS

This SA based charity provides packs of age appropriate emergency clothing and supplies for children and families taken into emergency care due to domestic violence or homelessness.

STEPS TO BETTER HEALTH

Driven by local medical practitioners, this project provides information on all health providers within the region, helping people to locate the right help when they need it.

**\$35,000 given
to community
groups**



COMMUNITY AND PHILANTHROPY PARTNERSHIPS WEEK

Held during the first week of November, the Community and Philanthropy Partnerships Week (CPPW) aims to celebrate the partnerships and connections between philanthropic donors within the community foundation sector and the wider community.

In 2017, Foundation Barossa received a grant from the Foundation for Rural and Regional Renewal (FRRR) and CPPW to hold a workshop to assist community groups in the region to learn more about philanthropy and develop strategies for engagement with donors and businesses to create ongoing partnerships. Funds from the grant were also used to develop a digital story to showcase the philanthropic partnership that drives the CONCORDIS program.

Additional funds from the grant have been directed towards the re-development of the Foundation's website which will assist in ongoing development of collaborative partnerships to create a more sustainable future for Foundation Barossa.



Community and Philanthropy Partnerships Week is an initiative of the Prime Minister's Community Business Partnership. It is funded by the Australian Government Department of Social Services and managed by Philanthropy Australia in partnership with the FRRR.

Our Impact

Scholars

Since 2008, Foundation Barossa has awarded the Thomas Scholarship a student from the Barossa region commencing their tertiary studies. Since its inception, through a generous donation from David Thomas and the Thomas Foundation, the scholarship has supported 14 students to undertake courses across a range of subjects from law and commerce through to geospatial sciences and viticulture.

The Thomas Scholarship is just one of six scholarships awarded each year. To date over \$355,000 has been allocated to scholarships through the Foundation's Barossa Education Trust.

Further information about each scholarship can be found on the Foundation Barossa website: www.foundationbarossa.org.au



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Ashby Schilling volunteering with the Pinery Fire surveying project to assist families whose farms were impacted by the fires.

Ashby Schilling 2015 Thomas Scholar

Ashby Schilling began a Bachelor of Geospatial Science at the University of SA in 2015. This program of study focuses on the mapping and surveying of the land around us. Ashby is now working towards his Master of Surveying degree which he hopes to complete in 2018. This will allow him to pursue a career as a licensed surveyor. A licenced surveyor is the only person legally allowed to sign off cadastral surveying projects. Cadastral surveying determines land ownership, boundaries and titles.

Throughout his course he has studied a variety of subjects including geospatial exploration, environmental remote sensing and digital cartography. His favourite subjects have been surveying as they most closely relate to his chosen career path and the applications of the skills involved.

“The Thomas Scholarship has been a fantastic support throughout my time at university. It reduced the financial pressure, contributing to course fees, books and study materials as well as day to day living costs such as transport.

It’s also reassuring to know that everyone at Foundation Barossa believes you can succeed.

The opportunity to take part in Foundation Barossa’s mentoring program has also been beneficial and rewarding. This has enabled me to focus on my studies and career building opportunities which has a led to position as a surveying assistant.

Foundation Barossa is making a huge difference by helping young people reach their goals.”

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Our Impact

Pinery Bushfire Appeal

Following the Pinery fires in November 2015, Foundation Barossa, in conjunction with the Foundation for Rural and Regional Renewal (FRRR), established the Pinery Bushfire Appeal. In the months following the fire, donations of over \$45,000 came through the community account set up through FRRR and cash received directly by Foundation Barossa. Donations came from individuals and businesses from both within the Barossa and further afield.

We thank every single person who contributed to the fund.

The fire had a large impact on the surrounding communities and relief efforts for people affected were coordinated through the State Recovery Office, within the Department for Community and Social Inclusion (DCSI). Local recovery centres were established throughout the region, with the Gawler Recovery Centre only closing its doors on 28 December 2016, over a year after the fire.

The work of the Recovery Centre, the coordination and support it provided to the community and to those impacted by the fire cannot be understated.

In the month directly after the fires, the local centres assisted over 2,500 people. In the year that followed, over 1,300 people visited the Gawler Recovery Centre. The work of the centres included personal and financial support and counseling, along with emergency housing and business assistance.



The Community Development Officer, Kirsty Dudley at the Gawler Recovery Centre, was our first point of contact for the dissemination of the funds from the Pinery Bushfire Appeal and we are grateful for her assistance and advice.

Kirsty and the other centre staff helped us to identify the communities that were most in need and assisted in coordinating the applications for our grant rounds. Based on the advice of the Recovery Centre, Foundation Barossa did not spend the first appeal funds until 12 months after the fires. As many other government and state-wide organisations became involved immediately following the fire, our main aim was to assist the long-term recovery for our local towns. Knowing that our funds would be available to communities once they were getting back on their feet. The last of the funds was spent before the end of June 2018.

Our grants assisted many of the communities within the fire zone. The grant process ensures that the funds went to community groups with specific projects to support and assist those directly affected by the fire. Communities and groups supported by the appeal included the Wasleys Community Hall, Owens Men's Shed, Hamley Bridge Community, Freeling Primary School and Wasleys Primary School. Other funds were distributed to revegetation and garden projects that assisted both native revegetation and helped families to rebuild their own home gardens to help with their own personal recovery.

Through the Bushfire Appeal we were also able to fund two years worth of Back to School vouchers for every school within the bushfire area. These vouchers were given to families who needed financial assistance to help children start the school year.

THE PINERY FIRE

Two deaths occurred and 31 people were injured.

***Other losses include:
82,600 hectares of land burnt.
97 houses destroyed and 49 damaged.
2 businesses (other than farms) and a bowling club destroyed.
580 sheds and outbuildings destroyed or damaged.
413 vehicles and pieces of machinery destroyed or damaged.
18,600 stock and 54,000 poultry lost.
\$30 million crops, hay and straw lost.***

Data taken from PINERY FIRE RECOVERY FINAL REPORT, July 2017

Thank you again to all who donated to the appeal, to the work of the Recovery Centre team and to all of the very dedicated people within communities who developed the projects to give back and support others in their time of need.

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 30 June 2018 total \$1,905,245, up from \$1,438,254 the previous year. The increase in fund balances has been driven by the receipt of a \$250,000 matching grant from The Thomas Foundation into the Peter Lehmann Arts & Education Trust (PLAET) and ongoing contributions to the Concordis, Elderton and Kicking Goals Education Trust sub funds. These capital contributions have been supported by healthy investment earnings totalling \$53,964.

Strategy information

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

The trustee adopts investment strategies to meet the following objectives:

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

The trustee of the fund exercises the same degree of care, diligence and skill that a prudent individual would exercise in managing the affairs of others. Investments are 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).

Funds under management with Godfrey Pembroke as at 30 June 2018 totalled \$1,696,877 across the Education Trust and PLAET, including unrealised gains of \$35,392.

Ernst & Young were engaged for the 2017/18 audit and have continued their support by agreeing to waive their audit fees estimated at \$6,500 plus GST in support of Foundation Barossa.

Income, Distributions and Expenditure

Total income for 2017/18 was \$550,581, up from \$495,850 the previous year.

Distributions declined in 2017/18 to \$43,899 largely due to no further pass-through funds associated with the Pinery Bushfire Appeal and Barossa Fundraisers for Cancer that were supported in 2016/17.

Distributions for 2017/18 include:

- Education trust scholarship payments totalling \$48,899, up from \$48,105.
- Community grants totalling \$5,000 were awarded but only distributed in August 2018 – Youth Barossa Inc \$2,500, Backpacks for Kids \$1,500 and Steps to Better Health \$1,000.

Total expenditure of \$29,735 was below prior year expenses of \$31,918 due to a reduction of \$5,876 in Executive Officer expenses, partially offset by increased expenditure on digital marketing material created for events associated with the Community Philanthropy and Partnerships Week. The investment in digital marketing assets was fully funded by a grant received from Foundation For Rural and Regional Renewal (FRRR).

Sub fund balances

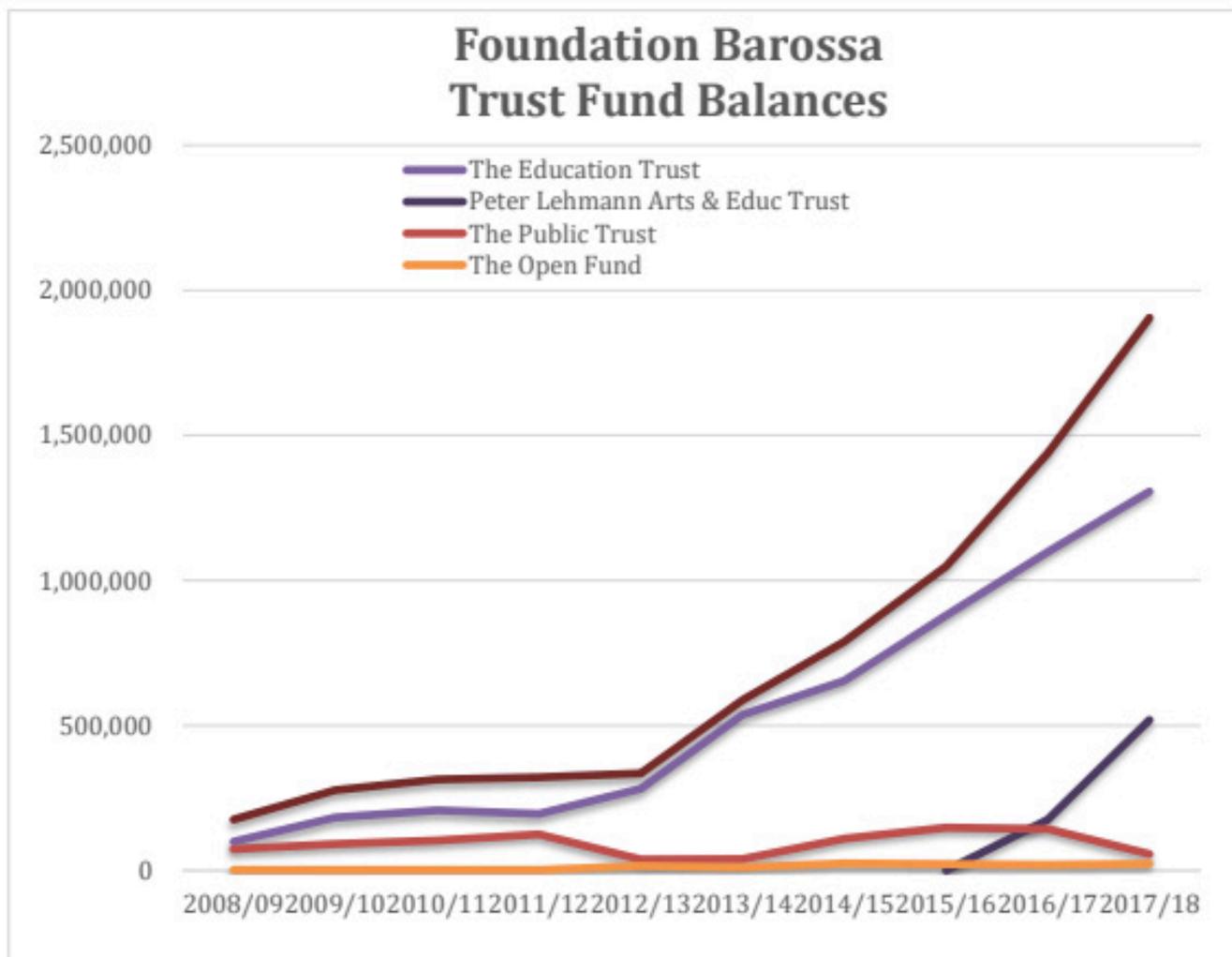
There was an increase of \$466,991 across all sub funds, driven predominantly by the Concordis sub fund +\$189,250 and PLAET +\$256,047 which received a \$250,000 matching grant from The Thomas Foundation.

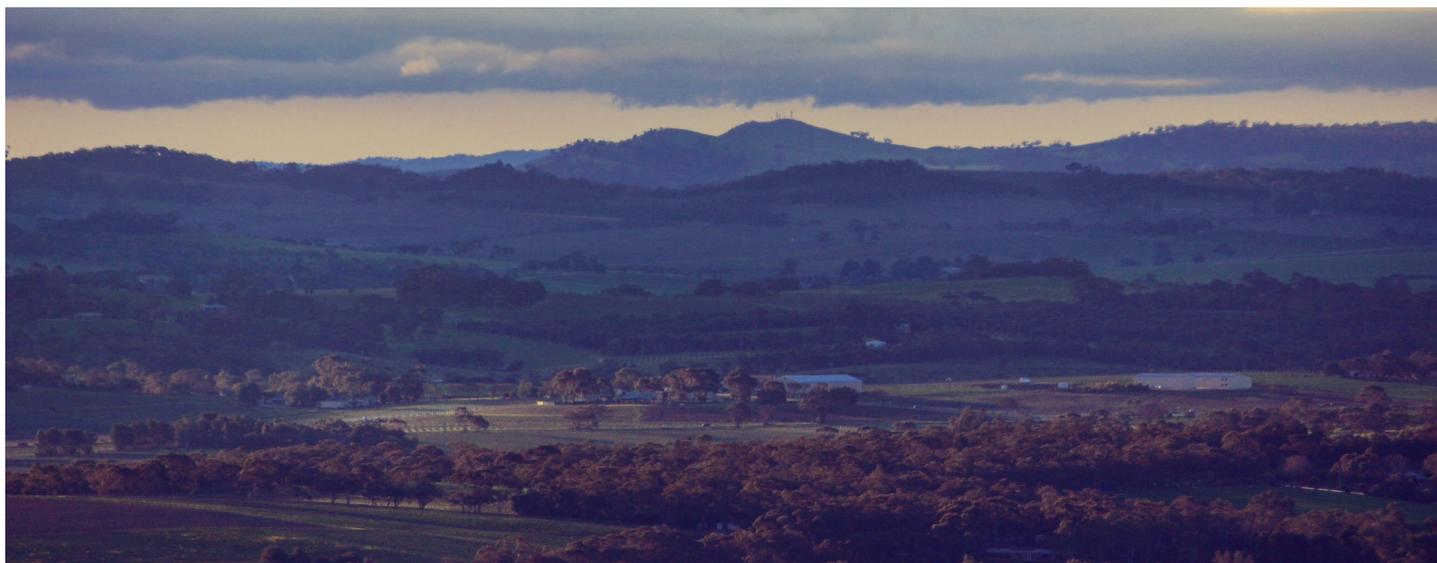
Note funds previously sitting in the Public Trust Peter Lehmann sub fund totaling \$87,625 were transferred to PLAET following approval received on 22nd June 2017 for inclusion on the Register of Cultural Organisations (ROCO).

All Education Trust sub funds benefited from strong investment returns, with interest and dividend income received (net of fees) totaling \$48,572. There is a small unrealised loss of \$1,291 on current investment holdings.

The Open Fund closed with a year-end balance of \$22,766, up \$10,854 on 2016/17. Targeted sponsorship and ongoing support from sub funds is critical for Foundation Barossa operations to remain sustainable and will remain a focus for 2018/19. Annual operating expenses have remained relatively flat over the last 5 years averaging \$30,514 p.a. 2017/18 operating expenses of \$29,735 equates to 1.56% of total funds as at 30 June 2018.

The graph below shows the balance of each sub fund administered by Foundation Barossa.





Looking Forward

The annual Foundation Barossa Board planning day was held in February. Discussions focused on the creation of a sustainable organisation and how we can communicate about what we do for the Barossa community so as to increase the impact that we have.

We have commenced a redevelopment of the Foundation's website, through the support of Fuller. The new website will allow us to promote all of our programs to a wider audience, increase the functionality of our online application system for all of our scholarships and grants and to showcase the impact of our work.

2018 saw a drive to gain new sponsors to enable sustainable funding for the operations of the Foundation into the future. Each year we are supported through the generous sponsorship of a number of organisations. Sponsorship funds go directly towards the operations of the organisation to enable the employment of a part time Executive Officer to undertake the administration and development of all of our programs. Our new sponsors include Casella Family Brands, Thorn-Clarke Wines and Kellermeister Wines.

It is through the generous support of our sponsors that we can ensure that 100% of all of the funds donated to specific sub funds can be used in perpetuity for our scholarships, education and grants programs.



Foundation Barossa is an organisation which encourages philanthropy in our region and provides a vehicle through which the community can help the community - forever.

WHAT WE DO

We nurture and build our community's strengths and assets by responding to challenges and opportunities to support individuals and organisations to do the same. This may be in the field of education, arts and culture, environment, health or community development.

We do this by building a corpus of donor funds *100% of which are donated in perpetuity*. Interest from these funds is distributed annually to local community groups and individuals.

WHO WE WORK WITH

Businesses, organisations and individuals who wish to support and strengthen our community by contributing funds generally or to a specific field about which they are passionate.

WHO YOU ARE

You are
 an individual
 a business owner
 a member of a sporting or charitable organisation
 an employee of a local business
 a retiree
 ... anyone who loves and appreciates our region for what it is and what it gives

You love Barossa for what it offers and what it stands for.
 You believe in supporting home grown talent and causes.

HOW YOU CAN GET INVOLVED

Help shape your community by becoming a donor.

- Set up a regular monthly contribution
- Make an annual contribution
- Make a one off contribution
- Establish your own sub-fund to serve a particular area of interest
- Make the Barossa Community Foundation part of your corporate citizenship program
- Leave a bequest in your will
- Become a Barossa Community Foundation volunteer to help with the Foundation's administration.

Contact foundationbarossa.org.au

info@foundationbarossa.org.au

facebook.com/FoundationBarossa
 twitter.com/FoundatBarossa

Ph: 0400 121 656
 PO Box 616 Nuriootpa SA 5355

Executive Leadership

Four new Board members were elected in 2017-18. Annemaree Clementson, Anthony Grundel and Angela Pickett bring local expertise and a variety of skills to our Board. Nick Slape takes on the role of Chair, following the departure of Anita Bowen after 6 years in the role.



Nick Slape: Chair



Trish Colbey: Secretary



Karl Martin: Treasurer



Lesley Anne Grimoldby: Board Member



Craig Grocke: Board Member



Lisa Laycock: Board Member



Greg Arthur: Board Member



Angela Pickett: Board Member



Scott Tolhurst: Board Member



Annemaree Clementson: Board Member



Anthony Grundel: Board Member



Kylie Piper: Executive Officer

Thanks to our supporters

Foundation Barossa is supported by a variety of individuals and businesses from the Barossa region. We would like to thank the following for their generous support:

Sponsors and Supporters



Scholarship Major Donors

Barossa Bands Scholarship



Cellarmasters Scholarship



Elderton Scholarship



Kicking Goals Scholarship



Peter Lehmann Arts and Education Trust



Thomas Scholarship



Concordis Traineeship



TWO HANDS WINES



How You Can 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 please visit the donation page at www.foundationbarossa.org.au.

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.

Support the Back to School Voucher program

Funds for additional vouchers or for the administration of the Back to School voucher program can be donated through FRRR or Foundation Barossa. Each year we also need volunteers to assist us in delivering vouchers to schools around the region.

Not everyone can make a financial contribution but your skills and time are just as valuable.

Become a Sponsor

Each year organisations and individuals from around the Barossa sponsor us to support our work through individual tax-deductible donations or corporate sponsorships.

Contact us on info@foundationbarossa.org.au to find out how you can be involved.





Foundation Barossa
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W: www.foundationbarossa.org.au

Facebook: facebook.com/FoundationBarossa

LinkedIn: linkedin.com/company/foundation-barossa/

Twitter: twitter.com/FoundatBarossa



**FOUNDATION
BAROSSA**

Giving Today to Enable Tomorrow