

# ANNUAL REPORT 2023



FOUNDATION  
**BAROSSA**

Giving today to enable tomorrow

Foundation  
Barossa  
encourages  
philanthropy  
within our  
community to  
support people  
and causes close  
to our home  
and hearts

# What is a 'Community Foundation'?

These two words succinctly describe our organisation, its purpose and its role.

## Community

A COMMUNITY foundation is community-centric to its location. This focus on place is central to its work and role. It exists to empower its community while taking a leadership position on the positive social changes that have been identified by its community. Its relevance and strength comes from a deep local knowledge divined from its local networks. These networks are anchored both in the service organisations that work at the front lines of social need as well as those organisations that are willing and able to provide the resources for positive social evolution. The Foundation provides the bridge between these organisations for enduring community development.

## Foundation

THE ROLE of a Foundation is to provide a stable and long term infrastructure that can guarantee the ongoing funding of community social initiatives. Positive change takes time and requires continuing contributions from multiple stakeholders. Funds need to be managed into the future so that the required resources can be supported indefinitely. The funds contributed today become the foundation upon which future investment can be built.

Community Foundations are an emerging player in Australia's philanthropic landscape, responding to specific needs and funding the projects their community needs and wants. There are 40 Foundations across Australia, mostly in regional areas, mostly less than 20 years old.

Here in the Barossa, our Foundation was started in 2002 and continues to grow with new social welfare initiatives being supported by the community every year.

# Our mission

We enable community  
philanthropy for the social,  
cultural and economic  
prosperity of the Barossa

# Our values



## COMMUNITY

We're a community based foundation that invests for the long term benefit of our community. We collaborate with like-minded organisations and individuals in our community to deliver on our promise.



## INCLUSIVE

We believe that everyone within our community deserves to participate fully. We recognise that some members of our community are excluded. We work to improve the ability, opportunity and dignity of those that are disadvantaged, to ensure no-one is left out.



## NURTURING

We identify those who can make a positive contribution to our community and help them achieve their goals.



## TRANSPARENCY

Our decision making and activities are open to all stakeholders and the community. We're diligent in our processes and governance to ensure we manage community funds properly.

# Our year of giving

**\$ 59,818**

To 18 local students in educational scholarships

**11**

Students became the 2023 Youth Ambassadors from 5 schools across the region

**\$ 22,210**

7 Peter Lehmann Arts & Educational Grants were awarded to artistic and cultural projects in the region

**57**

Laptops donated through the Yalumba Computer Donation program

**\$ 6,261**

Community grants were awarded to community groups in the region

**23**

Children supported through the Imagination Library youth literacy program

**\$ 38,500**

770 Local families supported across 13 schools through the FRRR Back to School program





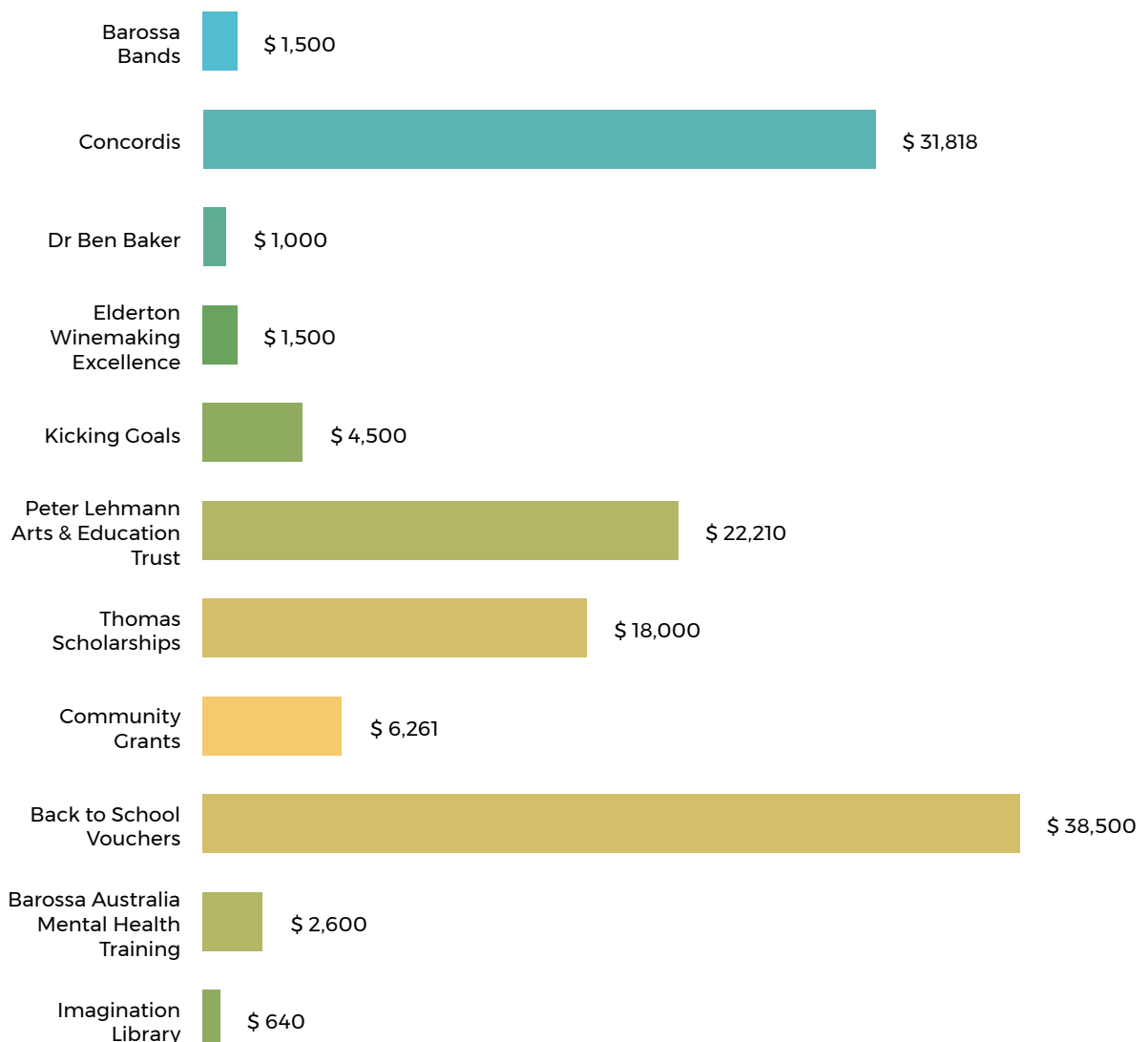
Top: Back to School Vouchers to Light Pass Primary School Principal, Melanie Leslie

Left: Computer donation to Tanunda Primary Disability Unit

# Grants and Scholarships awarded in 2023

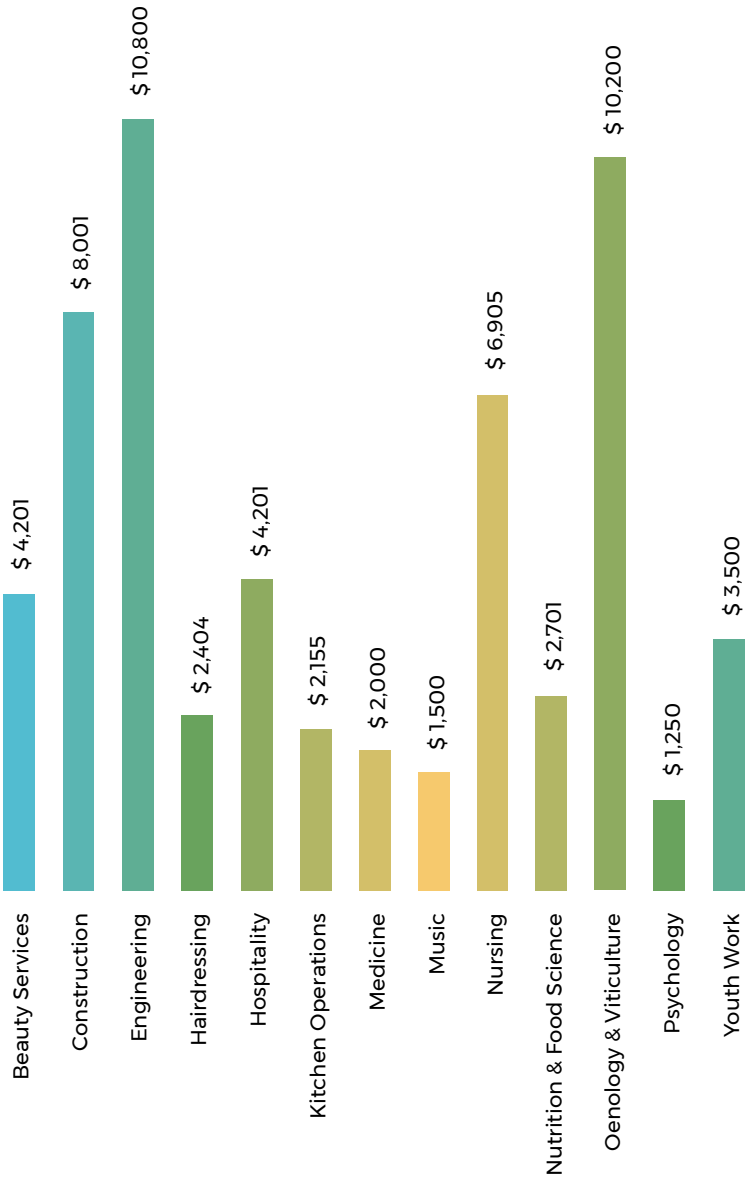
Foundation Barossa has awarded Scholarships and Grants of \$ 128,529 in 2023 and in excess of \$ 839,693 in the last 7 years.

## Grants & Scholarships awarded in 2023

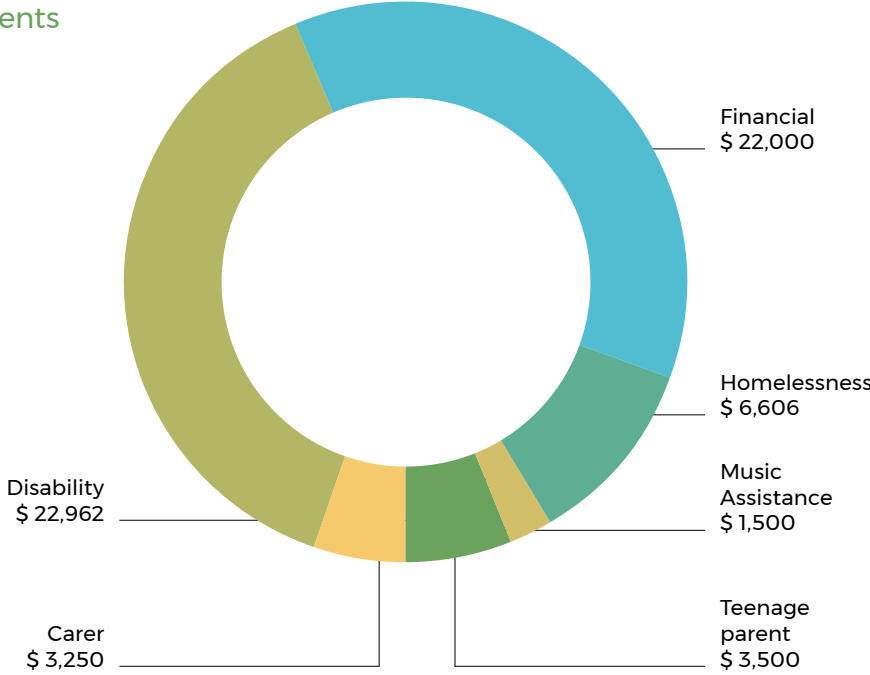




Areas of Study Funded by the Scholarships



Scholarship Recipients Barrier to Study



# Executive Officer Report

The last 12 months have yet again seen the community lean in to support those who need it most.

LAST YEAR we held an appeal to support youth literacy in the region through the rollout of the Imagination Library. Again, we saw bars, restaurants, and Cellar Doors come together to support Corkage for a Cause, raising much-needed funds to launch this program. WordPlay Wines came on Board as a program sponsor for the Imagination Library, allowing us to roll this program out to another thirty children each year.

We distributed an unprecedented \$ 38,500 in vouchers through the Foundation for Rural & Regional Renewal (FRRR) Back-to-School program, supporting 770 disadvantaged children in our community. We thank FRRR for their support of this program in our community since 2008.

The Yalumba computer donation program has also provided a tangible grass-roots impact to children who did not previously have access to a computer to be able to study.

We celebrated the anniversary of handing the keys to the first recipient of a youth homelessness prevention studio in the Barossa. As Margo said, 'It has saved my family'. Along with our program sponsor Homburg we thank the many people, schools, and organisations who have contributed to this important initiative as we prepare to roll out more of these studios through our 'Roof for our Youth' campaign, with the vision that no young person needs to experience homelessness in the Barossa.

We have continued to see our Concordis Social Inclusion scholarship recipients complete their qualifications. These people came to us from areas such as homelessness, domestic violence, disability, and a raft of areas that were impacting their ability for social inclusion. The heart-warming letters of thanks we receive talk to the recipients renewed sense of hope and optimism for the future.

The Youth Council, now in its third year, had eleven school-aged Ambassadors from five of the region's schools come and tell us about their recommendations for how we should award our Community Grants. Foundation Barossa sees The Youth Council as an opportunity not just to listen to the voice of the youth in our community but to be able to see issues through their lens and experience. We believe that our students should have an awareness of local community issues and be part of the solution for solving them. What a passionate group of young changemakers. They were also assisted by Mentors, who were past Foundation Barossa Scholarship recipients or Young Ambassadors. We thank these young people for their decisive insights and for making a difference in their community.

The Foundation continues to grow and adapt as the needs of the community change. We now have over fifty scholarship recipients at any time. There is a real depth and breadth to the scholarships we offer and the people we are able to assist. We receive acquittals that testify to the difference these scholarships have made to the recipients in removing barriers to study and finding paths out of disadvantage.

As we grow in line with the increasing needs of the community, it has been important for us to build partnerships that can support the operations of the Foundation long-term that allow us to run programs, deliver meaningful outcomes, and drive accelerated change in the community. The Future500 has provided a way for small businesses and individuals to support the needs of their community through an annual donation of \$ 500. We also have eight supporters of the Foundation Fund who contribute \$ 2,500/year for 3 years. To both the Future500 and Foundation Fund members we are extremely grateful for your support.

It is a privilege to work for an organisation that breaks down barriers and provides the opportunity, dignity, and support for innovative and life-changing programs in this extraordinary community.

Thank you to everyone who has supported the Foundation. We genuinely believe that what we do today will shape the future of the community tomorrow and we could not do what we do without your incredible support.

Thank you.

**Annabelle Travaglione**

# A message from the Chair

The Foundation is what it is today because of the efforts of all the members of our community who step up to ensure its sustainability and positive impact on the future of the Barossa region.

DURING the past year Nick Slape has resigned from the Board after six years. On behalf of the Foundation, I thank Nick for his contribution.

Annemarie Clementson has also left the Board after six years. Annemarie has been instrumental in developing the marketing capabilities of the Foundation, so we thank her for her good work.

A skills matrix undertaken last year identified a lack of legal knowledge on the Board. We were pleased to welcome Rebecca Duff to the Board at the start of 2023. Rebecca is a lawyer with Mellor Olssen and has lived in Tanunda for the past eight years.

## Strategy

### Generating additional revenue streams to meet operating costs

The operating costs of the Foundation have increased significantly over the last four years as the programs offered have expanded. The revenue to meet these costs is derived in the first instance from an administration fee charged against the funds being managed by the Foundation. From 1 July last year, this charge was increased from 1.5% to 2.0% per annum. It is important to note that the new charge is at the very lowest end of charges applied by charitable organisations.

The remaining revenue required to meet operating costs must come from external sources lest any shortfall be paid out of the invested funds. To ensure the Foundation covers its costs, several initiatives have been implemented:

- The Give a Little More Soup Kitchen has received overwhelming community support
- The sale of Phil & Thrope wines was a great success and is to continue in 2024
- The Future 500 Club has had early success
- The Foundation Fund Partnerships is being well supported

### Brand Building

Foundation Barossa was established in 2002. It has been supporting our community for more than 20 years. Over the last year, there has been an increased focus on building awareness in our community of the Foundation and the work it does in partnership with our donors and supporters.

The rationale is that as the Foundation's good work is more widely known across the community, the base of donated funds will increase allowing an increased positive impact in our community.

An important element of the Foundation's brand building and program awareness is the support provided by The Leader. We are very grateful to Darren Robinson and the team at The Leader for their very generous sponsorship of promotional space in their newspaper as well as the media support in general news.

Brand Warrior Communications has been engaged to support the marketing efforts of the Foundation. We thank Claire Doughty and her team for the additional pro-bono work also being provided.

I would also like to acknowledge Fuller Communications who are building a new website for the Foundation that will better communicate what the Foundation does and how people can support it. This new website is to be the focus of all digital marketing activities.

### DGR Status

Community Foundations in Australia are unable to access the benefits of being identified by the Federal Government as having 'Deductible Gift Recipient' status. Having this would allow donors to deduct all donations from their income tax. During the last year, the Federal Government has agreed to provide this status to the 28 community foundations in Australia. Legislation has been enacted and we await the details of this new regulatory environment.

We anticipate that having this status will lead to an increased attractiveness of donating to the Foundation's programs.

In the year ahead, the Foundation will maintain its focus on these issues, as well as ensuring its donor programs continue to support our community and those in need within it.

I thank the members of the Board for their contributions to the progress made over the last twelve months. I also thank our Executive Officer, Annabelle Travaglione, for her tireless work and professionalism on behalf of the Foundation and the community it serves.

### Neil Retallick



# Our Programs

## Concordis Social Inclusion Scholarships

THE CONCORDIS program was created through funds raised by an annual collaborative winemaking project, between Kaesler Wines, Seppeltsfield Wines, Torbreck Vintners and Two Hands Wines. Concordis provides educational scholarships to assist social inclusion in those affected by homelessness, mental health, disability or other areas of disadvantage.

Tariah was born with profound deafness due to an unformed Cochlea (both ears) and has worked hard to overcome a speech and learning delay due to hearing impairment.

Tariah has a long-held dream of becoming a hairdresser and was awarded a Concordis Social Inclusion Scholarship to fund course fees, a hairdressing kit, and a uniform to study for a Certificate II Salon Assistant qualification.

Tariah recently let us know she completed her first term and some of her assessments and has been learning hairstyles.

"So far, I am really enjoying the course and I am thinking about looking for an Apprenticeship after this course so I could become a hairdresser. I would just like to thank the Foundation for making this possible for me."



In 2023 Foundation Barossa awarded 11 Concordis Social Inclusion Scholarships valued at \$ 31,818, creating a pathway to further study to address disadvantage in the community.

The scholarships allowed the recipients to study courses including nursing, Civil Construction, hospitality management, youth work, hairdressing, psychology and medical science. The scholarships provide funding to address barriers to study. They provide funding for items such as transport, laptops, childcare for young parents trying to complete their Year 12, and support tutors and other study-related costs.

The primary goal of the scholarship is to help the recipients establish a career.

*Foundation Barossa is grateful to the Concordis partners to be able to support such a deserving group of people. We know from our past recipients how important these scholarships are and have seen how the financial support and encouragement has changed lives.*

Ian Hongell, Concordis Partner and Managing Director for Torbreck said: "4 years into the program I don't think any of us realised at the time the positive impact the Concordis scholarship could bring and help change young people's lives for the better."

Photo: Concordis Scholar, Tariah Bingham

## Back to School Vouchers

THE BACK TO SCHOOL initiative is part of the Rural Education Australia Program. Foundation Barossa has partnered with the Foundation for Rural & Regional Renewal (FRRR) since 2008 to provide these vouchers.

Back to School is a national program that helps remote and rural children and young people to engage in learning and strengthen their educational outcomes. Back to School provides \$ 50 vouchers to be used for items such as school uniforms, clothing, shoes, school bags and stationery - or anything that helps students feel ready to learn.

At the beginning of 2023, 24% of school-age children in the Barossa were on School Cards, which is considered a measure of economic disadvantage. This has been increasing steadily as we begin to see the impacts of the events of the last couple of years.

The vouchers are more than a \$ 50 gift. This program is about social inclusion and resilience, building confidence and morale in disadvantaged children.

In 2023 we distributed an unprecedented \$ 38,500 in



Back to School vouchers. This was due to the incredible generosity and support of FRRR and also our matched voucher Back to School partner, Barossa Real Estate. With this, we were able to provide 770 vouchers to Barossa families.

"We hope our contribution helps those disadvantaged kids that not only face the day-to-day pressure of education and growing up but the additional peer pressure of being seemingly different due to circumstances outside of their control." said Peter Fairweather of Barossa Real Estate.

In the program acquittal from one of the schools, the well-being teacher shared a story

of a Year 11 student who had made the decision to leave her mum's home and relocate to live with her grandfather to improve her chances of academic success. This meant moving to a new town and new school. Her grandfather was struggling to support her so the gift of the voucher allowed her to get some school supplies, a uniform, and bits and pieces. When she gave her the voucher the student cried, asked if she could give her teacher a hug, and said no one had ever done anything that kind for her before.

Photo: Barossa Real Estate Anita Wood and Peter Fairweather

## Thomas Scholarships

### Amber Perry and Tom Richardson were the Thomas Scholars for 2023.

THE SCHOLARSHIPS provided welcome support to the students, who will receive financial assistance to support their studies.

Amber impressed the panel with her dedication and determination to study a Bachelor of Viticulture and Oenology program at the Waite campus at Adelaide University beginning in 2023. Amber's passion for winemaking started a few years ago while working a vintage as a Vintage Cellar Hand at Barossa Valley Estate, after completing the vintage. She was fortunate enough to work in a very team-based and educational winery where she was given plenty of opportunities to grow her knowledge and learn about the wine industry. Amber was offered an opportunity to broaden her skills with a new role as a Vintage Lab Technician for the 2022 Vintage. This was a great opportunity and further cemented her commitment and love for the industry.

Amber is aiming to use the knowledge and experiences she will gain to give back to the Barossa community. She aspires to one day be a Head Winemaker at a winery where



she will be able to craft wines of the same quality that keeps the Barossa as a leader in the industry. This scholarship has given Amber the opportunity to study that otherwise she does not feel would have been possible due to financial hardship and a work-intensive study load. "I am extremely grateful to receive the Thomas Scholarship, it is such a privilege and will be invaluable in helping me through my university studies to achieve my dream of becoming a Winemaker. The financial assistance will allow me to buy the essential resources for the course and help with traveling costs to Uni which would be very hard to afford without this support from Foundation Barossa and the Thomas Scholar donors", said Amber.

Tom Richardson plans to return to the Barossa after completing a degree in either mechanical or electrical engineering. He will be enrolling at Adelaide University next near in the Engineering Flexible Entry

course which will give him a good insight into both careers and from there, he can choose which he will continue to study for the rest of his degree. "The generous support of this scholarship will allow me to set myself up for my studies at University. With this assistance, it will ease some of the financial pressures I will face with my tertiary education.", said Tom.

The Thomas Scholarship was Foundation Barossa's first scholarship. It was set up thanks to a generous donation by David and Barbara Thomas in 1998. Through the scholarship, Foundation Barossa helps young people contribute to Barossa's future.

*The Foundation would also like to thank Fiona Donald, Annemaree Clementson, and Steve Clarkson for being part of the selection panel and bringing their industry experience, passion for the region and support for local students to the process.*

Photo: Thomas Scholarship recipients Amber Perry & Tom Richardson

## The Imagination Library



### Putting a book in a child's hand opens a whole new world to them.

FOUNDATION BAROSSA ran a Christmas Appeal in December 2022 to deliver an early literacy program for disadvantaged children aged birth to five years in the Barossa. Many Cellar Doors, bars, and restaurants also contributed to the Appeal, donating the proceeds of the annual 'Corkage for a Cause' event, where the establishments donate the proceeds of corkage, tasting fees, or simply make a donation on the day.

Under the program that is run by United Way, each child registered to The Imagination Library receives a monthly book pack, containing a new quality age-appropriate book along with a reading tip sheet to support parents/carers to engage the child with the book and reading. Each pack is addressed to the child and posted to their home. 22% of Australian children start school developmentally vulnerable. These children are born with the same capacity for learning as their peers but don't get the same literacy building blocks to carry throughout life.

The Imagination Library helps us to find ways to spark the potential of children who might otherwise be left behind. The simple act of regularly reading to a child opens up a whole

new world. However, for families who struggle to put food on the table, books are often not a possibility. Receiving their own book each month will allow a child to make that world their own. By delivering this in a structured, nurturing way for five years before school, it will change the trajectory for that child completely.

Through the incredible generosity of the community, the appeal raised \$ 17,362. This included a generous contribution from the liquidation of Barossa Outside School Hours Care (BOSHC) of \$ 6,752. Lutheran Care works with disadvantaged families to ensure these books go to the children who need them most. They have already had 23 children sign up for the program.

Fiona Donald and Matthew Pick from Wordplay Wines have also come on as program Sponsors and have generously committed to donating funds to support an additional 30 children each year. "We are rapt that Wordplay Wines can support an initiative that gets more books into the hands of more children and families" said Fiona, "Not only is reading a life skill – once you learn to read, you can read to learn – but reading for pleasure is one of life's joys and creates lifelong readers."

"My kids are signed up to the Imagination Library and I wanted to say how amazing the experience has been so far. The kids are excited from the very beginning when it arrives in the mail. Its like a present each month. We sit together each night and read and will read throughout the day with the kids independently looking through the books when I'm busy. They absolutely love them. My kids favourites so far are Roo Knows Blue and Stanley's Train. My son is developmentally delayed and has a range of health issues but the experience reading together has helped him learn and grow and he has even started saying some words to follow the stories."

Photo: Wordplay Wines: Matthew Pick & Fiona Donald



## Dr. Ben Baker Memorial Scholarship Recipient



'I'm thrilled and proud to be studying and hope that my future career as a nurse will honour the memory of Dr. Baker.'

Caitlin Rehn

### Caitlin Rehn is our 2023 Dr. Ben Baker Memorial Scholarship recipient.

FOUNDATION BAROSSA and the Angaston Medical Centre established the scholarship in 2020 to honour the memory of Dr. Ben Baker. The fund provides annual education scholarships to students studying human health. Applicants need to show academic capacity, financial need and the motivation to succeed.

Caitlin is studying Nursing and Midwifery through Flinders University. With the goal to be working in rural and remote nursing once she has completed her degree with the Royal Flying Doctor Service.

"I feel absolutely privileged to be the 2023 recipient of the Dr. Ben Baker Memorial Scholarship. Dr. Baker was our family doctor for many years & is remembered with love & gratitude by my family," said Caitlin.

"Embarking on my own journey into nursing studies & moving to Adelaide is both scary & expensive, so the scholarship funds supplied by Foundation Barossa are going to be wonderful for meeting the cost, particularly of my nursing uniform, textbooks & special equipment like my stethoscope.

Photo: Nick Slape, Caitlin Rehn, Dr. Adrian Criscti, Naomi Graetz



## Elderton Winemaking Excellence Scholarship



### Zena Hudnott is the 2023 recipient of the Elderton Winemaking Excellence Scholarship.

ZENA is studying for a Bachelor of Viticulture and Oenology at the University of Adelaide. She was the standout applicant through her strong desire, passion, and commitment to contribute to and promote the wine industry in the Barossa. Zena has a particular interest in sustainable viticulture and winemaking practices, and how the wine and viticulture industries can be the leaders for agriculture as a whole as well as the importance of soil health. Last year Zena worked at an organically managed vineyard and winery on the Mornington Peninsula in Victoria. This experience provided her with a rich insight into not only the enormous benefits

of organic and sustainably focused viticulture, but also the difficulties and hard work that are associated with it. It triggered an interest to investigate and work in this field, and potentially be involved in methods and technologies that can make this sort of work more feasible and accessible to producers across Australia. Zena is hoping that throughout her studies and work experience that she will be able to continue investigating this path - and believes that the Barossa is the right place in which to do this. "Being selected for this Scholarship has connected me with supportive and knowledgeable people in Barossa wine, as well as providing me with the opportunity to develop my own knowledge in one of the original homes of Australian wine", said

Zena. The scholarship was established in 2015 to support a student to pursue a career in winemaking. As part of the scholarship, Zena will undertake a vintage placement at Elderton during Vintage 2024 and receive mentoring from the winemaking team.

The Ashmead family (owner and operators of Elderton Wines) take great pride in the Barossa region.

Keeping the balance between tradition, history, evolution, development and conservation of the region is important to Elderton Wines. "Zena demonstrated a real purpose and drive in terms of her future career ambitions along with a clear vision, which focuses on promoting the Barossa, sustainable agriculture, and the role of alternate varieties in the Barossa amongst a changing climate and consumer base." said Brock Harrison, Winemaker Elderton Wines. "The Elderton Winemaking Excellence Scholarship aims to mentor and inspire the next generation of winemakers to ensure a sustainable future industry, providing them with the perfect platform to develop and refine their skills throughout their time at Elderton."

Photo: Cameron Ashmead, Zena Hudnott, Brock Harrison

## Kicking Goals Scholarship



**Blake Brennand was awarded the 2023 Kicking Goals Scholarship through Foundation Barossa.**

BLAKE, a year 11 student from Nuriootpa High's Inclusive Education Centre aspires to gain employment when he finishes school as a tradesman, and in the future have his own business/self-employment. Blake is currently completing Certificate II in Construction to gain a better understanding of each trade area before he decides which one is the best. For Blake, an important part of the scholarship is the opportunity to be mentored by John Hughes.

John has slight Cerebral Palsy and has always wanted to put together a Scholarship that enables a student with a disability to go further.

The Kicking Goals Scholarship is designed to take a student in the Barossa region further into education, with the ultimate goal being employment.

"I would value the mentoring and the chance to have someone to talk to with career advice and being a young adult beginning the next chapter of life after school," said Blake.

Outside of school Blake's determination to succeed is also evident and has impressively competed in The Special Olympics in bowling, soccer, and basketball.

"Blake is a very impressive young man", said John Hughes, "Blake performs well at school, and has been acknowledged with both academic and personal development awards at school. I am very much looking forward to mentoring Blake, helping him create opportunities for an apprenticeship where he can be on-the-job learning, and seeing him further develop his interests in the construction industry.

Blake had put a lot of work into his interview and came ready to answer questions with a PowerPoint he had prepared. "I think Blake may end up mentoring me!", added John.

*Photo: John Hughes and 2023 Kicking Goals recipient Blake Brennand*



**Jack Braunack was the 2021 Kicking Goals recipient.**

JACK, who is studying for a Bachelor of Agricultural Sciences at the University of Adelaide has Cerebral Palsy and spastic diplegia. Jack has always had a love of learning and embraces any opportunities that come his way. He worked at Seppeltsfield Road Distillers during high school to support his studies really enjoyed the experience it gave him and made him aspire towards independence.

"Jack was hired as a dishy at SRD for his personality while still at school. Over 4 years later his dedication to his work, team and guest interaction has seen him become one of our most renowned team members. Never letting his disability get in the way, the glass half full approach to life that Jack has is something we could all learn to embrace. The future is bright for Jack and we're proud to have him as an SRD alumni." Jon Durdin, Managing Director at Seppeltsfield Road Distillers.

A credit to his determination, Jack also worked with occupational therapists and was successful in obtaining his driver's license.

"My goal is to embark on a University education in the field of agricultural science as plants and insects fascinate me. This scholarship would be hugely beneficial in helping me to gain my license and work towards being independent and living life to my full potential."

Jack has certainly done that and is now halfway through his degree. His favourite subject was Agricultural Systems because there were lots of unique excursions and tours we were able to go on that allowed us to visit industry, meet producers and get an inside view into many production systems that are used. It allowed the students to make connections to some leading people in the industry while opening up possibilities for future work and options that are in the industry.

"The Foundation Barossa Scholarship has really helped me to be able to support my University learning by supporting me financially. I was able to acquire learning resources that better my experiences in my subjects while providing mentorship that is flexible and supportive."

Photo: Jack Braunack, 2021 Kicking Goals Scholarship recipient

## Yalumba Computer Donation Program



"The student was previously having to rely on a school loan computer but now has access to their own which has given them more independence and control over their learning. This has been valuable in helping the student work towards their SACE completion."

Karl Martin, Managing Director, Yalumba

THIS IMPORTANT partnership between Foundation Barossa and Yalumba provides on average 50 second-hand computers a year that can go to some of our disadvantaged students in the region that most need them, helping these young people to engage in learning and strengthen their educational outcomes.

We would like to extend our thanks to all at Yalumba, the feedback from the welfare teachers at the schools on this program has been overwhelmingly positive.

Karl Martin, Managing Director, Yalumba said "Working with Foundation Barossa we understand there are families in our local community who require financial support to help provide education materials and resources for their children. Having a formalised computer donation program in partnership with Foundation Barossa will help meet these needs. Yalumba looks forward to being able to support local families and individuals in need, and would like to think this can be a long term program that contributes to providing a better education experience and improved educational outcomes for the recipients."

"A young mother who without a laptop was unable to access learning. It was also beneficial for her as she could use the laptop to access Centrelink and other support providers online. This reduced her need to use public transport to get to the services in Gawler & Elizabeth - tricky with a baby!"

A huge thank you to all at Yalumba for the laptops we are able to distribute to the local schools through the Yalumba Computer Donation Program.

Photo: Laptop donations from Yalumba with Ashley Fergusson and Russell Fraser



## Barossa Australia Mental Health First Aid Training



THE BAROSSA Australia Wellbeing Fund, established with Foundation Barossa is to better equip members of the region's wine and grape growing community and people working in a field related to the visitor economy to engage in meaningful conversations and provide active support for people affected by poor mental health.

A free two-day Mental Health First Aid Training was held in July 2022 at The Barossa Cellar. The training was conducted by St Johns Ambulance to teach people how to provide initial support to adults who are developing a mental illness or experiencing a mental health crisis. The course is accredited by Mental Health First Aid Australia.

"The Barossa grape growing, tourism related & wine making community's most precious asset is its people. Ensuring that they have access to

best practice mental health training that can be amplified across the region and used as needed is hugely important in contributing to the overall health and resilience of the sector." Scott Hazeldine, CEO Barossa Australia.

"The training has empowered me with the skills to recognise when someone may be struggling with their mental health and the tools to talk to them about it," Todd Hissey, Rockford Wines.

Photo credit: Wine Australia



## Homburg Homelessness Prevention Fund 'A Roof for Our Youth'

WITH YOUTH homelessness increasing in the region, Foundation Barossa partnered with Kids Under Cover (KUC), Centacare Youth Homelessness Barossa and Homburg Real Estate to come up with a solution, launching an appeal in 2020 to raise funds to build the first KUC youth homelessness prevention studio in our area.

Kids Under Cover, a not-for-profit organisation based in Victoria, run a studio program which provides secure and stable accommodation for young people at risk of homelessness, building relocatable studios that are installed in the backyard of the family or carer's home. Studios are prefabricated, with the entire kit flat-packed with pre-assembled frames and transported to the installation location. Erected and fully fitted within 10 days, the studios are demountable and are able to be flat-packed for relocation up to six times, with no cost to the applicant or family.

The studios can be put on owned, rented or Housing SA property. Foundation Barossa has recently launched the 'A Roof for Our Youth' awareness campaign for this program.

The studios provide extra space relieving overcrowding, easing tensions and providing young people with a secure and stable place. Homburg Real Estate came on board as a program sponsor in 2021, donating funds for every property sold and rented in the Barossa, which has contributed over \$ 70,000 donated to the appeal.

"Our entire company was shocked to learn the depth of youth homelessness in the Barossa and accordingly, everyone was more than willing to support this initiative, to do what we can to help those in need," said Guy Draper, Joint Principal of Homburg Real Estate.

In total the appeal has raised \$ 208,951 through incredible community support. The South Australian Government provided \$ 2.4 million to KUC to expand the program throughout South Australia, providing Foundation Barossa with the funds for another seven studios in a campaign named, 'A Roof for our Youth.'

The first studio in the region was built in 2022 for great-grandmother Margo, 75, who lives in a small home in Nuriootpa and has custody of her four great-grandsons.

This is the first time the boys have had their own room. "It's a relief knowing that they've got a permanent place where they can stay...", said Margo. "This year and last year, both Seth and Gabe were getting A's in some of their subjects and Seth said to me, 'Nan, I've never got an A before in whatever school we've been at.' "I am so proud of them," said Margo.

For Margo it's important that her great-grandsons know they have a permanent home they can come back to, whether it's to sleep or eat. "They know there's a home here," said Margo. "This studio has saved my family."

*Photo: Great grandmother Margo and Gabe, one of her great grandsons. Credit: Jennifer Minns, The Leader Newspaper*



'This studio has saved my family'

Margo



## The Youth Council & Community Grants 2022

THE FOUNDATION Barossa Youth Council is an annual program for school students to inspire and help shape the future of our community.

The Youth Council Program provides the students called the Youth Ambassadors, the opportunity to have a say about local issues, learn new skills, have fun and develop a closer connection to their community. The program gives the Ambassadors the exposure to community issues and opportunities to take up responsibilities, contribute to solutions and ultimately, make a difference in their community.

Darcy McBride, Reeve Waples, and Tom Wohlers from Tanunda Primary School & Disability Unit and Emily Fear and Anthony Bombardieri from Nuriootpa High School were the 2022 Ambassadors. They presented their recommendations on the Community Grant applications to a special session to the Foundation Barossa Board.

The Foundation Barossa Community Grants support community-based projects throughout the Barossa region. The projects assisted address key needs, building community strength and finding collaborative solutions to community problems.

The Youth Council recommended the following projects which were unanimously endorsed for funding by the Board.

The "Shelter, warmth and cooking supplies for people experiencing homelessness" project from Centacare Youth Homelessness, which addresses the key needs of people experiencing homelessness in the Barossa region – shelter, warmth, and capacity to cook food and heat water. The grant will provide sleeping swags for young people who are 'rough sleeping', couch surfing packs, and packs for people sleeping in cars.

A Sammy D Foundation grant that had been put forward by Dr. Bill Gransbury on behalf of Angaston Football Club. The Sammy D Foundation educates young people on the impacts of bullying and drug and alcohol fuelled violence. By providing relevant age-appropriate knowledge and tools, young people are empowered to make positive life decisions.

A 'Rewilding' grant for Barossa Wildlife Rescue provides education and engagement opportunities to connect local youth to local wildlife. It will develop and implement a pilot program targeted at high school students which:

- educates students about local wildlife and what makes them so unique and valuable
- educates students about the threats to native ecosystems, and what they can do to address these
- educates students about how to respond to injured wildlife
- provides opportunities to interact with and care for wildlife.

A grant for Tanunda Primary Disability Unit for a bubble machine & boom box to allow for inclusive play for non mobile students.

Foundation Barossa sees the Youth Council as an opportunity not just to listen to the voice of the youth in our community but to be able to see issues through their lens and experience. We believe that our students should have an awareness of local community issues and be part of the solution for solving.





Top: 2022 Youth Council  
Emily Fear, Darcy McBride,  
Reeve Waples and  
Tom Wohlers (Anthony  
Bombardieri not pictured)

Bottom left: Tanunda  
Disability Unit bubble  
machine grant.  
Bottom right: Centacare  
'Shelter, warmth and  
cooking supplies' grant

## The Peter Lehmann Arts & Education Trust



Established in 2014, The Peter Lehmann Arts and Education Trust (PLAET) fosters arts and cultural learning opportunities and access. It provides grants for arts, culture, and education projects in the Barossa.

FOUNDATION BAROSSA oversees the administration of the trust with an Advisory Committee, including members of the Lehmann family. As in previous years, the quality and diverse range of applications for arts, culture and history projects in the Barossa impressed the advisory panel. The 2022 projects supported were the following.

Top: The Nuriootpa High School Collaborative Mural  
Right: Rebekah Rosenzweig, 2022 recipient 'A History of the Barossa Vintage Festival'





## The Barossa Elders Oral History Project

### **Barossa Village received a grant to document and record the histories of Barossa Village Residents.**

EACH OF THE RESIDENTS at Barossa Village has a unique story to tell and has shaped our region into what we know today. Barossa Village partnered with Christian Teusner from the Emu Tree in a special oral and visual histories project focusing on 10 residents from the Barossa Village Aged Care Facility who grew up and lived their lives in the Barossa Valley. The Barossa Village Elders project objective was to capture, preserve and create awareness of the histories and stories of these individuals.

"It is an absolute privilege to share in people's stories", said Matt Kowald, General Manager of Barossa Village. "It's why a lot of us work in aged care. Barossa Village wants to preserve these stories for future generations so they can understand how people lived. Oral histories give us the chance to preserve a person's voice which is often the first thing we forget when people are gone."

## Nuriootpa High School Collaborative Mural

### **Nuriootpa High School received a grant through the Peter Lehmann Arts & Education Trust to create a 75-square-metre collaborative mural within the school grounds.**

THE DESIGN and painting of the mural were completed by a student working party, professional artist Lucinda Penn, and the Student Representative Council. The working group connected with past scholars of the school at Barossa Village. Students from the school's Inclusive Education Centre and ATSI (Aboriginal and Torres Strait Island) group were also involved in the process. Combining the perspectives of these students with other members of the community provided a broad perspective of the cultural and historic fabric that makes up Nuriootpa High School.

The students were asked to consider what being a student of Nuriootpa High meant to them, the values of the school, and the connection of the school to the wider community when considering the design of the wall.

Key themes that can be seen highlighted in the beautiful mural include kindness, diversity, respect, learning, connections, opportunity, and meeting place.

"Nuriootpa High School was a very important institution to all of us," said Philip Lehmann. "My brother Dave and I were both matriculating students from there in the 90's, and Mum an English teacher in the 70's. We were all captivated by the mural proposal by the SRC students, and what a ripper idea to lift that drab but functional building with some thought-provoking art and colour, and "to sustain and nurture the culture within the school with the wider Barossa community."

## Artist in Residence: Hill and Son Organ

**Central to the trust is a focus on the Barossa Hill and Son Organ.**

THE RESTORATION of this important piece of Barossan history was a project that Peter and Margaret Lehmann took a personal interest in.

The trust supports scholarships, performances, recordings, compositions and audience development, to ensure that this organ continues to be a vital part of musical life in the Barossa and beyond.

The Artist in Residence program was run by Josh van Konkelenberg for the third year. The project involved conversations with church leaders, the friends of the Hill and Son Organ and the Barossa Music School and a concert with improvisations and a pop-driven repertoire, with the inclusion of familiar classical works as a highlight rather than a focus.

## Fun in the Park

**A grant was awarded to fund a community ephemeral and photographic art project at the Angaston Train Station.**

THE GENERAL community made small clay figurines which were placed around the Angaston Train Station with over 500 small figurines made over the 5 days. The activities were photographed as part of SALA 2023 that was held at the Angaston Train Station gallery.

## Tutti Arts – Inside Out project

**Funding was provided to Tutti Arts to create an accessible outdoor studio and exhibition space at 56 Murray Street, Nuriootpa.**

THIS WAS A placemaking project to create four initial art pieces, that included a mural along the boundary fence, a living sculpture along the front boundary fence and two smaller site-specific pieces on and around the water tanks at the rear of the property.

AR and projection mapping technology was used to extend and underpin more traditional painting and sculpting techniques. These accessible technologies enhanced the creative process, imparted new skills to artists and helped create contemporary works that will reflect both the past and the present.



Top: Matt Kowald (Barossa Village, Margaret Lehmann and Philip Lehmann

Bottom: Fun in the Park sculptures

'One of the most enduring memories I have of traveling around the Barossa with Dad was the oral commentary that recounted the landmarks, events, and people who wove the tapestry of our region's past. Looking back, I wish we'd had the foresight to record this oral history for my kids to know... So, capturing forever the small, all too easily overlooked pieces of local history as told by those who have lived it is incredibly important for both the families of those who tell their tales but also for future generations of our region too.'

David Lehmann



## Barossa Bands

CONGRATULATIONS to our two newest Barossa Band Scholarship recipients, Thomas (Tom) Jaeger and Bethany Lobbegeiger.

The Barossa Bands Scholarship was created in 2015 following the disbanding of the Barossa Junior Brass Band. The aim of the Scholarship is to enable and promote the tuition of young, talented musicians who will be mentored by one of the local community bands.

Tom, from Eudunda Area School, has been learning the alto saxophone since 2020. "The scholarship will help fund music lessons that I have each week", said Tom.

"The lessons help me to improve my sight reading and enables me to play better. I will also use it to buy a new music book that I will start using soon."

Bethany, a student at Nuriootpa High School is learning to play the clarinet and currently hires a clarinet from the school. She would like to be able to buy her own clarinet, so she can keep practicing over the school holidays as she currently has to return it over the summer.

"I would love to have my own personal instrument to be able to care for", said Bethany.

On hearing about her scholarship success Bethany said, "Oh wow! This is incredible. I plan to buy my own clarinet in the holidays, so I don't have to hire one from school. I'm really enjoying learning clarinet and have just joined the school concert band."

Photo: Bethany Lobbegeiger and Tom Jaeger



## Give a Little More Barossa Soup Kitchen

Give A Little More Barossa, the heart-warming initiative raising funds for the community, returned for a second year in August 2022, raising \$ 11,750 towards the vital community support programs of Foundation Barossa.



GIVE A LITTLE More Barossa was established in 2021 by Chef Sam Smith. Sam was thrilled with the response from the culinary community, with many more putting their hands up following the example set by last year's program. The 2022 culinary teams dishing up a rotating menu were:

- Otherness and Breaking Bread
- Vine Inn and Barossa Fresh Bakery
- El Estanco and Cheryse Zagler
- Rockford Winery and Mehl Sourdough
- Vintners Bar & Grill and Apex Bakery

"I believe it is important to keep our food culture and food production grounded in the communities in which we belong. This event is supported by community and held for community. It would not be possible without the generosity and shared belief of so many local individuals and businesses" said Sam.

Give A Little More Barossa is part of the regional food and wine festival, A Little More Barossa, which includes over 50 events throughout August. The initiative represents a strong community partnership between chefs, bakers, Foundation Barossa, Barossa Co-op, Northland Packaging and Barossa Australia.

Photo: Give a Little More Chefs & Bakers 2022



# Supporters

A donation to Foundation Barossa is an investment in the future of the Barossa Region and will assist in creating a stronger, more resilient and inclusive community.

## Foundation Fund

Pernod Ricard  
Yalumba  
Barossa Quarries  
Pam O'Donnell & Robert O'Callaghan  
Rieslingfreak  
David Franz Wines  
Tarac  
Soul Growers

## Gifts In Kind

Fuller Communication  
JamFactory  
Barossa Campus  
Australia Wide Badges  
Barossa Valley Sound and Vision  
William Buck  
AON  
W2 Wealth  
Brand Warrior Communications  
The Barossa Co-op  
Northland Packaging

## Future 500

Active Psychology Services  
Gardner Knives  
Harvest Kitchen  
Fallon Consulting  
Yield Business Advisory  
Michael Hall Wines  
Penny Rafferty

## Corkage for a Cause

Rockford Wines  
Rieslingfreak  
The Louise  
Char Barossa  
Yalumba  
Thorn Clarke  
Alkina  
Henschke  
The Eatery  
Maggie Beers Farmshop  
fermentAsian  
Two Hands Wines  
Seppeltsfield  
Hive Barossa

## Partners

Rieslingfreak  
/ Kicking Goals Scholarship

Barossa Australia  
/ Barossa Australia Mental Health First Aid Training

Elderton  
/ Elderton Winemaking Excellence Scholarship

FRRR / Back to School Vouchers

Barossa Real Estate  
/ Back to School Vouchers

Angaston Medical Centre  
/ Dr. Ben Baker Memorial Scholarship

Seppeltsfield / Concordis Social Inclusion Scholarship

Kaesler / Concordis Social Inclusion Scholarship

Two Hands Wines / Concordis Social Inclusion Scholarship

Torbreck Vintners  
/ Concordis Social Inclusion Scholarship

Homburg Real Estate  
/ Homburg Homelessness Prevention Fund

Marananga Brass Band  
/ Barossa Bands Scholarship

Tanunda Town Band  
/ Barossa Bands Scholarship

Yalumba  
/ Yalumba Computer Donation Program

Wordplay Wines  
/ The Imagination Library

The Leader / Media Partner



Annual Report 2023



Top: Tarac: Karen Kalleske, Jeremy Blanks, Julie Rawling  
 Left: Soul Growers: Paul Heinicke & Stuart Bourne



# PHIL & THROPE & Corkage for a Cause

After selling out of the inaugural release, we are pleased to announce that our Phil & Thrope wines are back.



NOT ONLY are these wines the perfect gift, but by choosing PHIL & THROPE, you are helping Foundation Barossa to support people and causes close to home and the heart.

### Our Mission

Our mission is simple; to create great wines for a great cause.

### The Labels

A special thank you to the artists (pictured) from Tutti Arts, who created the labels, Gemma Brett and Johanna Roberts.

### Sponsors

In addition to the winemakers we would like to recognise the following sponsors:

- Wine labels donated by CCL
- Photography of images by multi-disciplinary creative, Andy Ellis

You must be 18 years of age or older to order or receive alcoholic beverages.

Photo: Gemma Brett and Johanna Roberts, creators of the wine bottles artwork.

## 2023 Hughesy's Eden Valley Riesling

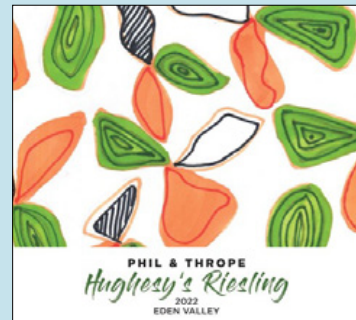
Made by John Hughes of Rieslingfreak and sourced from the Zander and Mason family, from Flaxman Valley and the Tscharke and Bartholomaeus vineyards from Eden Valley, Phil & Thrope's

2023 Riesling is fruit-driven with generosity on the palate, poised for ultimate enjoyment on release.

Hughesy's Eden Valley Riesling artwork was created by Johanna Roberts.



**John Hughes**  
Rieslingfreak



**\$ 200 / Dozen (plus freight)**

**Click the link to purchase:**  
[rieslingfreak.com](http://rieslingfreak.com)

## 2021 Lehmo's Barossa Valley Shiraz

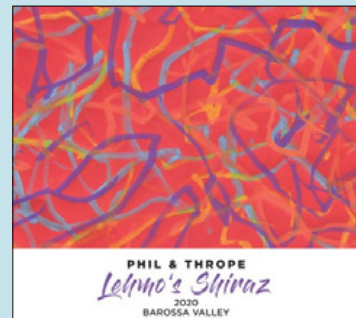
The 2021 Barossa Valley Shiraz is made by David Lehmann of David Franz. A three-barrel blend selected from their Bultawilta, Horse Paddock and House on the Hill Blocks

to create a rich, Barossa Shiraz that drinks beautifully now or will go the distance in any cellar.

Lehmo's Barossa Valley Shiraz artwork was created by Gemma Brett.



**David Lehmann**  
David Franz



**\$ 200 / Dozen (plus freight)**

**Click the link to purchase:**  
[david-franz.com](http://david-franz.com)

# Treasurer's Report 2022/23

Prepared by Lisa Laycock, 1st February 2024

THE COMBINED financial position of the four Foundation Barossa entities increased by \$ 115,688 (5.5%) over the 2022/23 financial year to \$ 2,221,320. This was driven by an increase in the market value of investments by \$ 41,169. Income from donations and sponsorship income totalled \$ 177,861 and net investment returns after fees were \$ 88,465 (an average return of 4.0%). These were offset by scholarships, grants and distributions totalling \$ 121,427 and operating expenses of \$ 106,449.

The investment markets remained challenging and volatile during the 2022/23 financial year. Concerns over high levels of inflation, increasing energy costs and a cost of living crisis domestically, combined with concerning global factors including the Russian/ Ukrainian war and debt levels in the United States continue to negatively impact investment returns. On the upside, increasing interest rates have proved beneficial to our investments as a considerable portion is held in cash.

## Open Fund

The Open Fund closed with a year-end balance of \$ 46,821 with a net inflow of funds for 2022/23 of \$ 24,848. Annual operating expenses increased \$ 19,386 (+25.4%) on the previous year from \$ 76,306 to \$ 95,692, equating to 4.4% of total net assets as at 30 June 2023 (vs 3.6% for FY22). This increase in expenses was primarily due to a 33% increase in the Executive Officer's working hours which is being funded by a generous donor for a period of five years from December 2021.

Operational costs were funded by inter-entity administration fees of \$ 45,291 (LY \$ 30,331) (Education Trust \$ 27,366, PLAET \$ 9,573 and Public Trust \$ 8,352) and the support of the local Barossa community by way of sponsorship & donations of \$ 33,876. In addition, the new Phil & Thrope wine fundraiser organised by John Hughes and David Lehmann generated \$ 26,215 in its inaugural year and the ArtLease program contributed a net amount of \$ 875.



## Barossa Education Trust

The funds under management in the Barossa Education Trust increased by \$ 27,738 (2.0%) to \$ 1,396,080. This was driven by an increase in the market valuation of investments of \$ 33,521 (2.4% return p.a.),

investment income after fees of \$ 60,604 (4.4% return p.a.) and external donations totalling \$ 9,521. An internal management fee of 2.0% of the corpus, or \$ 27,366 was paid to the Open Fund and scholarships totalling \$ 51,011 were paid.

Education Trust	Note	Donations \$	Distributions \$	Fund Balance as at 30/06/2023 \$	Fund Balance as at 30/06/2022 \$
Thomas		49	20,500	437,157	436,518
Kicking Goals		-	2,777	98,302	96,379
Co-op Retailers		-	-	50,733	48,341
Cellarmaster		-	-	25,824	24,607
Concordis		4,472	22,234	700,435	684,759
Elderton		5,000	3,000	83,529	77,638
Barossa Junior Band	(1)	-	1,500	-	-
Dr Ben Baker	(1)	-	1,000	-	-
<b>Total</b>		<b>9,521</b>	<b>51,011</b>	<b>1,395,980</b>	<b>1,368,242</b>

(1) Corpus funds are held in the Public Trust & distributed via the Education Trust. Donations above exclude those made from the Public Trust

## Peter Lehmann Arts & Education Trust

The Peter Lehmann Arts & Education Trust (PLAET) funds under management decreased by \$ 6,220 (-1.3%) to \$ 472,437 due to \$ 26,430 in grants being distributed during the year, which was

in excess of net income earned by the Trust. Realised investment income and interest totalled \$ 19,403 and donations of \$ 1,972 were received. Internal administration fees of \$ 9,573 (2.0% of net assets) were paid to the Open Fund.

## Public Fund

The Barossa Region Community Trust (Public Trust) funds increased \$ 69,322 (29.2%) to \$ 306,520. The majority of this increase (\$ 47,121) was due to donations made to two sub-funds that are pass-through in nature, as it is the intention that the donations themselves will be distributed, which is in contrast to our usual model

of operating where donations are invested and the earnings are distributed. The balance of the corpus sub-funds increased by \$ 21,746.

This financial year, donations received into sub-funds totalled \$ 85,283, investment earnings were \$ 3,438 and unrealised investment gains increased the balance of the fund by \$ 7,647. Grants and scholarships totalling

\$ 16,901 were paid. In addition, a donation of \$ 20,000 was received from Tour de Cure which was distributed to Barossa Area Fundraisers for Cancer at their request; and donations made by members of the public to fund operational costs totalled \$ 21,288.

The table below provides a summary of the sub-funds within the Public Trust:

Public Trust	Note	Donations \$	Distributions \$	Fund Balance	Fund Balance
				as at 30/06/2023 \$	as at 30/06/2022 \$
Community Grants	(1)	25,744	6,161	29,456	9,735
Barossa Junior Band Scholarship	(2)	1,000	1,500	26,459	26,479
Barossa Australia Well-Being Fund		-	2,600	51,227	53,839
Dr Ben Baker Scholarship	(2)	5,147	1,000	20,432	16,420
Kicking Goals Scholarships		910	-	2,186	1,245
<b>Total Public Fund (corpus)</b>		<b>32,801</b>	<b>11,261</b>	<b>129,760</b>	<b>107,718</b>
Homburg Homelessness Fund		29,744	-	159,031	128,480
Back to School Vouchers	(3)	5,000	5,000	1,036	1,000
Imagination Library		17,377	640	16,694	-
<b>Total Public Fund (pass-through)</b>		<b>52,121</b>	<b>5,640</b>	<b>176,761</b>	<b>129,480</b>
<b>Total Public Fund</b>		<b>84,922</b>	<b>16,901</b>	<b>306,521</b>	<b>237,198</b>

(1) Excludes \$ 20,000 grant auspiced from Tour de Cure & donations for operational costs of \$ 21,288

(2) Corpus funds are held in the Public Trust & distributed via the Education Trust

(3) These funds were used to purchase matched vouchers in addition to those received from FRRR

## Investment Policy

The trustee adopts investment strategies to meet the following objectives:

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

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).

An annual review of the investment strategy and market investments is conducted by our advisor, W2 Wealth, and additional investment advice is also considered on an ad hoc basis.

## Pro-bono Goods and Services

Goods and services were gratefully received on a pro-bono basis or at significantly reduced commercial rates from Barossa Wide Badges, Brand Warrior, Fuller Communications, The Barossa Co-op, The Leader Newspaper, William Buck and W2 Wealth.

# Governance

AS CUSTODIANS of the monies donated by the community over many years, the Board takes its governance responsibilities very seriously. The Foundation operates in a highly regulated space where compliance is mandated in many ways. It is also important that the decisions of the Board and the activities of the Foundation are transparent to its community.

Over the last twelve months, the Board has reviewed its Rules. These rules set down the objectives of the Foundation and its operational methodologies, many of them defined by legislation. These new Rules have been approved by the SA Government's Office of Consumer and Business Services. The next step is to finalise a review of the Board Charter. This document defines the responsibilities of the Board and of management.

There are several Board policies also being reviewed presently, some revisions of existing policies and others being introduced to reflect changes in our operating environment. Although not required to do so under the Act, the Board approved a Privacy Policy as a further assurance that individuals' personal information will be kept confidential.

A new audit partner, William Buck, was appointed in late 2022. The 2022/2023 annual accounts were completed by this firm on a pro-bono basis, and we thank them for their professional advice and their generosity.

W2 Wealth continues to provide investment services to the Foundation. We thank Mark Williams and his team for their ongoing support of the Foundation.

# Our board members



**Neil Retallick**  
Chair



**Annabelle Travaglione**  
Executive Officer



**Lisa Laycock**  
Treasurer



**Angela Pickett**  
Secretary



**Jenny O'Brien**  
Board Member



**Amy Heinicke**  
Board Member



**John Hughes**  
Board Member



**Simon Newbold**  
Board Member



**Abbey Underwood**  
Board Member



**Rebecca Duff**  
Board Member



**Nick Slape**  
Outgoing Deputy



**Annemaree Clementson**  
Outgoing Board Member



# How can you help?



## Individual

Donors can contribute at any time and have the pleasure of seeing the difference their fund is making. They may choose to donate an amount annually or monthly or make a one-off donation and take advantage of the tax benefits available for charitable donations.



## Corporate

Businesses often contribute to funds such as Foundation Barossa as part of their corporate citizenship, nominating or even establishing their own scholarship, project or favourite community cause.



## Gifts in Wills

You can choose to leave a bequest to Foundation Barossa in your will. You might choose to leave your Gift in Will freely - 'no strings attached' - so that the Foundation can apply the money to the area of most need. Or you might leave a Gift in Will with a specific request that it be used for a particular purpose - for example to establish a scholarship for rural students. Should you wish to set up a named or memorial fund for a scholarship or other specific purpose, please contact Foundation Barossa.



FOUNDATION  
**BAROSSA**

Giving today to enable tomorrow

For more information on how you can support Foundation Barossa, please contact us.

**Annabelle Travaglione**  
Executive Officer  
info@foundationbarossa.org.au  
foundationbarossa.org.au

You can donate now

