

ANNUAL REPORT 2022



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

17

Local students supported with \$ 55,352 in educational scholarships

5

Local students became the 2021 Youth Ambassadors for The Youth Council

11

Peter Lehmann Arts and Education Grants totalling \$ 27,090 were awarded to artistic and cultural projects in the region

9

Laptops donated through the Yalumba Computer Donation program

\$101,925

Raised for the prevention of youth homelessness in the region

\$13,680

Raised through the Foundation Barossa Christmas Appeal 2021 to provide recreational camps for young carers

740

Local families supported with \$ 37,000 of vouchers across 13 schools through the FRRR Back to School Program



Top: Community grant for Nuriootpa High Breakfast Club.

Left: Community grant for Hand in Hand Family Centre Garden for Wellbeing project

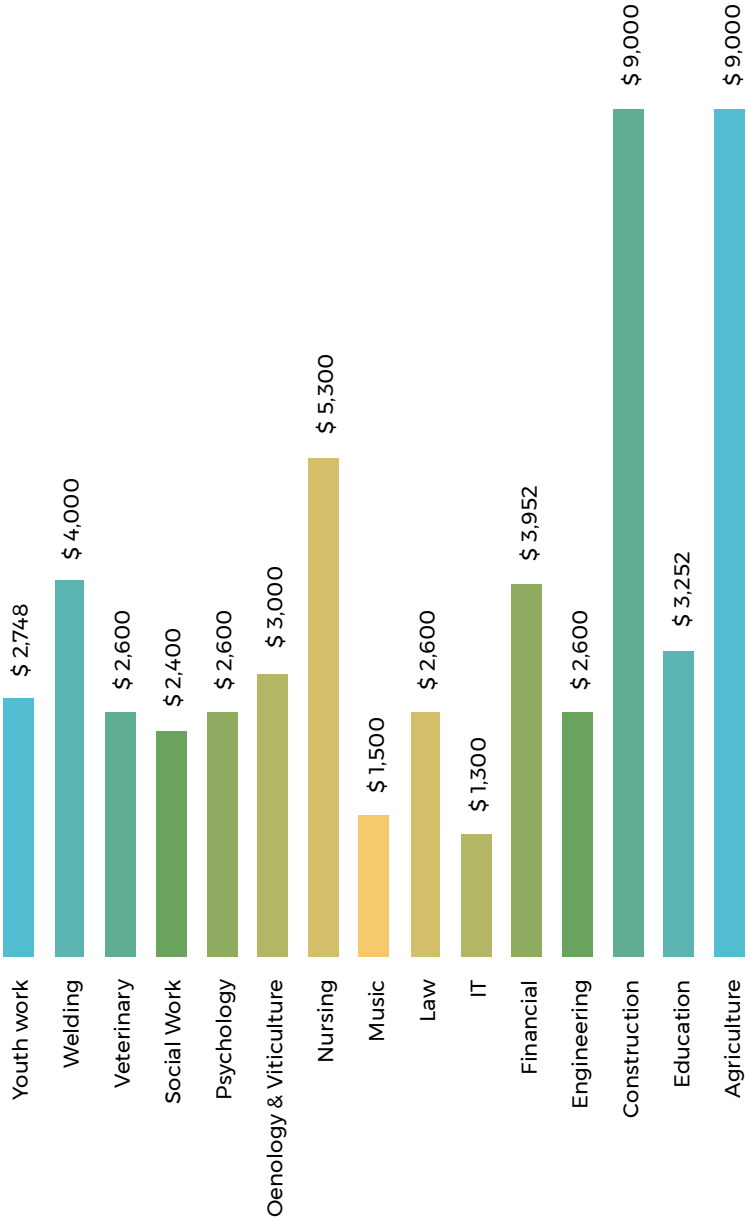
Grants and Scholarships awarded in 2022

Foundation Barossa has paid from 2018-2022 in scholarships, grants and to community appeals.

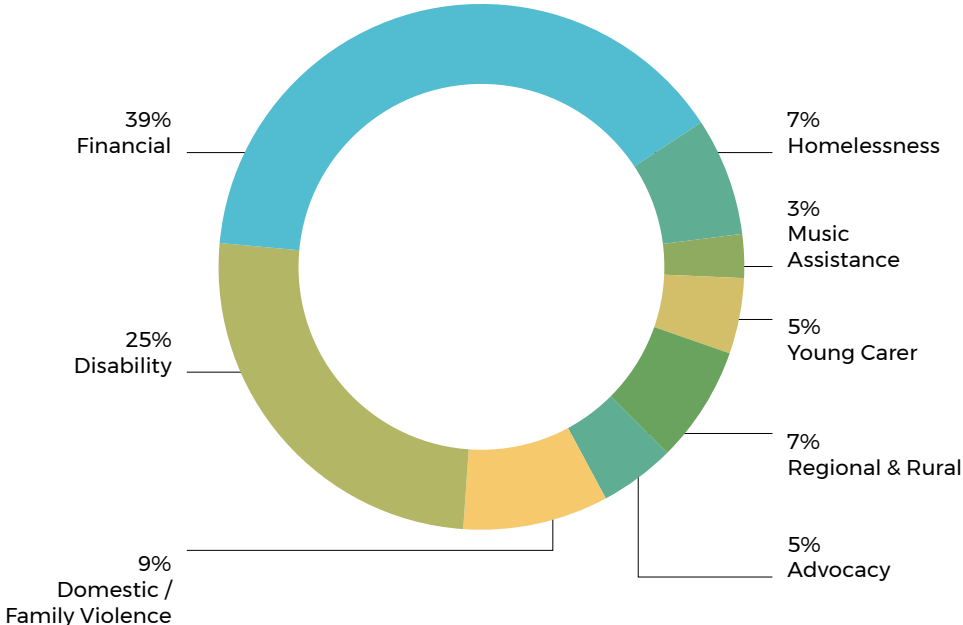
Grants and Scholarships by Year (\$)



Areas of Study Funded by the Scholarships



Scholarship Recipients Barrier to Study



A message from the Chair

The last year has seen a significant increase in the contribution of the Foundation to the social fabric of the Barossa community. Many individuals and organisations have continued their commitment and many more have stepped up to help those in need of support.

THE SUCCESSES of the Foundation's programs reflect the generosity of our community.

There have been some significant developments in the year. Directors Lesley Ann Grimoldby, Anthony Grundel and Karl Martin retired from the Board, each after many years of service. We recognise their valuable contributions and thank them for it. The Board has been fortunate to appoint John Hughes, Simon Newbold and Abbey Underwood as new Directors.

The driving force of the Foundation is its Executive Officer, Annabelle Elton-Martin. Annabelle joined the Foundation in 2018 working two days per week. The work required to maintain and expand the Foundation's benevolent activities has increased significantly since then. From January 2022, Annabelle's working week increased from 3 to 4 days. The Foundation acknowledges the generosity of Pam O'Donnell and Robert O'Callaghan in supporting this change.

A long-term issue for all community foundations across Australia has been the inability to qualify for DGR (Deductible Gift Recipient) status. This limitation adversely impacts the operating costs of the Foundation and its ability to raise funds. After many years of lobbying by The Honourable Tony Pasin MP, our local Federal member, Treasury has agreed to review the criteria so that community foundations can obtain DGR status. We are very grateful for Mr Pasin's efforts.

A key responsibility of the Foundation is the management of the funds provided by donors. The Foundation has around \$ 2,000,000 invested across its corpus programs, largely invested in the share market. Over the last year, the capital value of these funds has decreased. However, the Foundation's capacity to support its programs is based upon the income derived from these investments, rather than their capital value. From the funding perspective, all programs have been maintained unchanged.

While all scholarship programs have been maintained during the past year, there have been some notable milestone developments.

The community has been very generous in its support of the Homburg Homelessness Prevention Fund, so named because of the exemplary support provided by Homburg Real Estate. In early 2022, the installation of the first Kids Under Cover Studio was agreed. As this was the first such construction in our region, there were many learnings for all stakeholders involved. In early August, a 2-bedroom studio was provided to a family where overcrowding was creating a difficult family environment. The expanded, more independent space combined with ongoing support from Centacare is proving a game-changer for this family. Work continues to identify more families where there are at-risk children.

The Community Grants program was assessed through the Youth Council. Students across Years 7 to 10, from local schools, advocated for those programs they believed the Foundation should support. The Foundation thanks David Thomas for his generous contribution to support this program over the next 5 years.

Yalumba has initiated a program assisting students to achieve their ambitions. The company is donating up to 50 laptops each year to students who otherwise would not have them. The laptops are the result of the company's ongoing IT upgrades. They come refurbished and are greatly appreciated by the students.

After being deferred from January because of the Covid pandemic, the Annual Awards Night was held in August this year. More than 150 attendees saw 68 scholarships awarded across 9 programs.

Communication plays a critical role in the success of the Foundation. The central pillar of all communications is the Foundation's website. Work on the redevelopment of the website began in early 2022. Last updated only a few years ago, the website no longer provides seamless access to information about the Foundation's expanded programs and fundraising initiatives. It is anticipated the new website will be 'live' in early 2023.

Good governance is fundamental to the values of the Foundation and its continuing success. During the year the Board initiated several

activities in this regard. The Audit Partner has changed. The Board thanks EY for its support over the last seven years and welcomes William Buck. Some Directors attended community leadership training made available by the RDA. As an input to its succession planning, Board members completed a Skills Matrix. They also completed a Board Health Check Survey made available through Philanthropy Australia. The results will be input to the Board's Strategy Workshop to be held in early 2023.

A key focus of the Board this year has been to develop additional revenue streams to fund the operating costs of the Foundation. The "give a little more" program operated a soup kitchen at Barossa Central in August 2021, raising more than \$ 8,400. Local chef Sam Smith was a driver of this initiative and The Barossa Co-op provided funding to cover the cost of ingredients. We thank them both as well as those other chefs who generously donated their time and efforts. The soups were all delicious!

With the support of John Hughes (Rieslingfreak) and Dave Lehmann (david Franz Wines), 200 dozen bottles of riesling and shiraz have been produced under the 'Phil and Thrope' label – the profits from the sale of which are being donated to the Foundation. The labels were specially designed by artists from Tutti Arts.

The Foundation will continue to maintain the professional, empathetic and caring support it currently provides through its current programs and improve its performance where those opportunities arise. It will also maintain a watching brief for any emerging community issues.

On behalf of the Board, I thank the Foundation's donors and partners for their ongoing support of the Barossa community. I also thank the Executive Officer, Annabelle Elton-Martin, for her commitment, compassion and willingness to go that extra mile in driving the purpose of the Foundation. My gratitude goes to the members of the Board for their significant contributions to the Foundation over the last year.

I look forward to us all working together to build a better future for the Barossa community.

Neil Retallick

Our Programs

Homelessness Prevention Fund

IN AUGUST 2022 South Australian Human Services Minister Nat Cook officially opened our first Kids Under Cover youth homelessness prevention studio in the Barossa.

Margo took over caring for her four great-grandsons after their parents were having some difficulties and were unable to give them the opportunities they needed. Tensions were rising between the boys without them having their own space in her small home. Margo believes the studio will help the boys develop their independence and relieve some tension and pressure in the house.

Margo could not thank everyone enough for the difference the studio would make in the lives of her great-grandsons.

Kids Under Cover runs an innovative, evidence-based studio program, which provides secure and stable accommodation for young people at risk of homelessness. They build relocatable one- and two-bedroom (with bathroom) studios that are installed in the backyard of the family or carer's home. Each studio is used to prevent homelessness on average for four children.



Kids Under Cover received funding through the South Australian Housing Authority to expand its studio program into South Australia.

The studio was co-funded through the Homburg Homelessness Prevention Fund. Homburg Real Estate donates funds for every property sold and rented and has to date donated over \$ 65,000 towards this initiative. Their incredible generosity means we will be able to continue to fund these studios throughout the Barossa.

The extra room will relieve overcrowding, ease tension and provide young people with a secure and stable environment, preventing

them from leaving home prematurely and potentially becoming homeless.

We would like to thank everyone who has contributed to the Homburg Homelessness Prevention Fund from businesses, and philanthropists to the children that have come up and given us their pocket money. This would not have happened without the support of the community.

Photo: Andrew Beadman & Guy Draper (Principals Homburg Real Estate) handover the keys to the first youth homelessness prevention studio in the Barossa

Yalumba Computer Donation Program

STARTING HIGH SCHOOL can be daunting for many children but even more so if they do not have access to a laptop to be able to study at home and complete assignments.

A new partnership between Foundation Barossa and Yalumba is helping these young people to engage in learning and strengthen their educational outcomes. The Yalumba computer donation program sees Yalumba donating fifty second-hand computers a year that can go to the students that most need them in the region.

The impacts of the events of the last couple of years have resulted in the Barossa seeing an increase of 8% in the number of school-age children on School Cards, which is considered a measure of economic disadvantage. For many families being able to purchase a laptop for their children is just not a possibility. Foundation Barossa manages the program and works with the schools to determine where they are most needed. These laptops are then distributed by the school welfare teachers. In addition to laptops being provided to high school students, they will also be used for students who need to either isolate or home-school due to the impact of the pandemic. Laptops are also made available to the disability

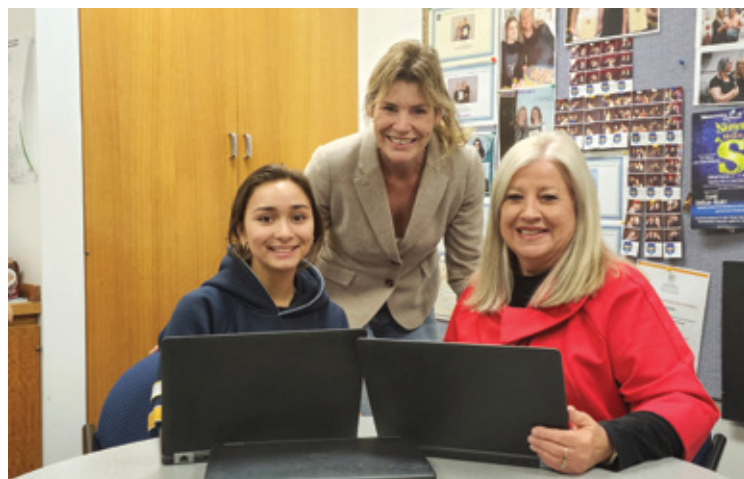
units in schools, allowing specialist software to be loaded to improve educational outcomes for students with additional learning needs.

We would like to extend our thanks to all at Yalumba, the feedback from the schools on this new program has been overwhelmingly positive. Our mission through initiatives like the Yalumba Computer Donation Program is to work with the local community and the local service providers to identify key needs of the community, build community strength and find collaborative solutions to community problems that create a strong, vital community in which everyone can participate and contribute. The impact of this program will be determined through impact acquittals from schools and recipients but the expectation is the program is about social inclusion and resilience,

building confidence and morale and overcoming barriers to study.

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.”

Photo: Laptops being received on behalf of students at Nuriootpa High School by Gerri Walker Principal and Head of SRC, Katrina Kellond



Concordis Scholarships Provide Opportunities for 11 Barossa Students

THE CONCORDIS program was established in 2015 by Kaesler Wines, Seppeltsfield Wines, Torbreck Vintners and Two Hands Wines (in partnership with Foundation Barossa) to give back to the region that has been so supportive of them. Through funds raised by an annual collaborative winemaking project, Concordis provides scholarships to assist those affected by homelessness, mental health, disability or other areas of disadvantage.

Who does Concordis assist?

Barossa can be considered a prosperous region, however, there is increasing evidence that homelessness, mental health, disability and other matters impacting social

inclusion are challenges for many in our community.

The Concordis Social Inclusion Trust is a two-pronged approach by providing scholarships for:

- Individuals affected by these issues to provide a pathway to address this disadvantage.
- Individuals working in these key areas of disadvantage to better respond to the areas of disadvantage identified and to work with the community to prevent the causes of disadvantage.

In 2022 Foundation Barossa Scholarships awarded 11 Concordis Social Inclusion Scholarships valued at \$ 28,352. The scholarships aim to create a pathway to further study to address disadvantage in the community.

The scholarships will allow the recipients to study at university and TAFE. Areas of study include education, community services, law, health sciences, business, engineering and electronics. 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.

'My favourite subject for this semester would be how to recognise and respond appropriately to domestic and family violence. This topic relates to my future work as with the industry I'm looking to go into, young people have experienced domestic and family violence throughout their childhood.'

The Foundation Barossa Scholarship has helped me immensely. Without this scholarship, I would not have completed my Certificate IV in Youth Work. The guidance and support you get are incredible. Completely and utterly grateful.' Tahlia Falkenburg Concordis Scholar 2022.

Photo: Concordis Social Inclusion Trust partners,



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.

The objectives of the Back to School program are to:

1. Improve access to education through enabling the purchase of items required to attend and engage in school;
2. Help meet basic needs that assist children to reach their full potential, and fit in with their peers; and

3. Build local connections and community resilience through local distribution networks and Community Foundations.

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.

The Barossa has seen an increase of 8% in the number of school age children on School Cards, which is considered a measure of economic disadvantage, 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 2022 we were able to distribute an unprecedented \$ 37,000 in Back to School vouchers. This is due to the incredible generosity and support of FRRR and also our matched voucher Back to School partner, Barossa Real Estate. With this, we can provide 740 vouchers to Barossa families. The distribution of vouchers will be determined by the school welfare teachers.

We have a significant number of families living under financial pressure and many students who may have additional needs. Being able to give them a gift of a voucher really helps children experience a sense of belonging. Being able to buy a new pair of shoes, although that may seem small, can really make a difference to the life of a child.

"Thank you for your continued support of our families and community. The vouchers are a greatly appreciated support for students and families of Tanunda Primary. Vouchers have been used to purchase educational materials / extras which some students / families may not have been otherwise able to purchase", said Nick Wuttke, Deputy Principal Tanunda Primary School.

Photo: Barossa Real Estate matched funding sponsors of Back to School Vouchers.

Thomas Scholarships

THESE SCHOLARSHIPS provided welcome support to the Year 12 students from Truro and Light Pass. The families of both students had weathered tough years on their farms and vineyards.

Ryan Noack impressed the panel with his excellent academic results and commitment to the community. He plans to study a Bachelor of Agricultural Science at Adelaide University.

"I feel extremely privileged and thankful to have been chosen to receive this scholarship. It will help me so much with the costs associated with studying at Uni", said Ryan.

Kayley Boehm plans to return to the Barossa after completing her Bachelor of Primary Education, University of South Australia.

Her favourite subject was Learning Through Play as she had never considered the importance of play in education but learned that play is a child's natural way of learning.

'Winning this scholarship gives me the ability and motivation to follow my childhood dream. I'm excited about the future and feel so blessed to share it with the community,' said Kayley.

The Thomas Scholarship was established thanks to a generous donation by David and Barbara Thomas in 1998.

Through the scholarship, Foundation Barossa helps young people contribute to the Barossa's future.

Barossa Bands

Samual Haley and Felix Lobegeiger were the 2022 recipients of the Barossa Bands scholarships. The aim of the scholarship is to enable and promote the tuition of young, talented musicians. Foundation Barossa awards these annual scholarships in collaboration with the Nuriootpa and Marananga Town Bands.

The scholarships provide \$ 750 for travel, tuition, uniforms, instrument purchase, or hire. More importantly, the recipients are mentored by a local community band.

Nuriootpa High School student, Felix was looking to buy some new drumsticks and an electronic drum kit with an amp for sound.

For Kapunda High Student Samual, the scholarship allowed him to buy his own French Horn and continue lessons in each of his instruments (trumpet, French horn and tenor drum).

Music is a creative outlet for Samual who has autism. When asked what the scholarship meant to him, Samual replied " Music means I can blow out all my hot air with trumpet and practice control with French horn and bang out with tenor drum. It helps me feel calm. It's fun and a challenge and I really enjoy it."

The Barossa Bands Scholarship was launched in 2015 following the closure of the Barossa Junior Brass Band. Each year up to two scholarships are awarded to students in years 7 to 10.



Top: Thomas Scholarship recipients Ryan Noack and Kayley Boehm

Bottom: Barossa Bands Scholarship recipients Samuel Haley and Felix Lobbegeiger

Dr. Ben Baker Memorial Scholarship

TRACEY NOACK was the 2022 recipient of the Dr. Ben Baker Memorial Scholarship Fund.

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.

Tracey is studying Nursing and Midwifery through Uni SA with the goal to be working in the Barossa region mainly as a midwife but with further education in Registered Nursing.

Tracey grew up on a farm in Moculta, moving to St Kitts when she got married 21 years ago. Tracey is a mother to seven children. Sadly, her eldest daughter was diagnosed with severe spastic quadriplegic cerebral palsy and passed away nine years ago. Tracey had always dreamt of being a midwife, but as a full-time carer to her daughter, she never thought it would happen.

Tracey said *“Studying Nursing and Midwifery at University was something I had previously never thought possible, but I have the opportunity to complete a degree that I had in the past only dreamt of doing. Along with the support of my husband and children, this scholarship will help me fund some of the costs of studying externally. Being awarded this scholarship has extra special meaning to me, as it was actually Dr. Ben that encouraged me to look further into making my dream a reality, and told me about the pathways that I could take to gain entry into University. I am extremely grateful and honored to have been given this wonderful opportunity.”*

Dr. Ben’s colleagues and family hope the scholarship will remove some of the financial stress of studying health. They want to support another doctor or health professional to build community connections, as Dr. Ben did. Foundation Barossa invests donor funds in perpetuity and distributes the interest each year as grants and scholarships. The capital remains intact, and the giving continues forever. This means the legacy of Dr. Ben will continue in support of students studying rural health for years to come.

“The impact Ben had on his patients and our community is proof of the amazing doctor he was. We’re all so proud of Ben’s achievements, so this scholarship means a lot to our family”. Paula Baker

Photo: Dr. Adrian Griscti, Tracey Noack, and Paula Baker



‘The Dr. Ben Baker Memorial Scholarship is a way of supporting students from our community to achieve their dreams and is one of the ways we remember Ben’s passion for rural health’

Dr. Adrian Griscti

Elderton Winemaking Excellence Scholarship



ELDERTON CONTINUES to support the next generation of winemakers, announcing Thomas Geyer as the 2022 recipient of the Elderton Winemaking Scholarship.

Thomas is in the fourth year of a Bachelor of Viticulture and Oenology at the University of Adelaide, having completed the International Baccalaureate Diploma Program in 2017.

"I'm very grateful to have received the Elderton Winemaking Excellence Scholarship, and am excited to begin my mentorship program and learn as much as I can from the whole team at Elderton, I'm truly thankful to be accepting this opportunity to extend my education."

Elderton Wines established the scholarship in 2015 to support a student to pursue a career in winemaking.

'Thomas was the standout applicant for this year's scholarship. He is proudly Barossan and extremely wine passionate. We are very much looking forward to him working at Elderton for Vintage 22,' said Cameron Ashmead, Co-Managing Director of Elderton Wines.

Photo: Cameron Ashmead (Elderton) awarding Thomas Geyer the 2022 Winemaking Excellence Scholarship

Barossa Australia Mental Health First Aid Training

THE WELL-BEING of the community has always relied on our strong sense of togetherness and a willingness to pitch in, help out and lend an ear where it is needed.

The Barossa Australia Well-being 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.

"Our goal is to arm as many of the community as we can with the skills to be the first line of support for anyone within their network who may show symptoms or are experiencing mental health issues. This first aid support may provide an all-important stopgap between the time the issues expose themselves until they can receive appropriate professional treatment." James March, CEO Barossa Australia.

A free two-day Mental Health First Aid Training was conducted by St John Ambulance at The Barossa Cellar to teach 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.

This evidence-based course covered how to identify and assist those who may be experiencing issues with their mental health. Course participants learn about the signs and symptoms of common and disabling mental health conditions and how to use a systematic approach to effectively assist those who are experiencing a mental health crisis. It also covers strategies that have been proven to be effective in treating and managing mental health conditions, as well as how and where to access professional help.

Kicking Goals Scholarship



Charlie Goodfellow was our 2022 Kicking Goals Recipient

CHARLIE, A year 12 student from Nuriootpa High School Inclusive Education Centre, has a long-held dream to become a welder. He is hoping to study metal fabrication at Barossa TAFE and get some work experience or an apprenticeship in welding, as Charlie said “you have to work your way up”.

For Charlie, the most important part of winning the scholarship was the opportunity to be mentored by John Hughes.

John 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



Jacob Judd was awarded the Kicking Goals Scholarship in 2019

JACOB JUDD has been studying for a Certificate 3 in education support at TAFE and is just over 12 months in.

Jacob said “ My favorite subject was funny enough, the one I struggled with, the subject was all about supporting students that have ASD (Autism Spectrum Disorder) and learning all about it. This is very relevant in an educational background especially when there is a student with ASD struggling.”

The Foundation Barossa Kicking Goals Scholarship helped me so much by funding me in my studies, so I can start making a career for myself that I am passionate about. It has also given me support via a mentor John Hughes, John has been amazing with his commitment and support with me I have so much to thank him for.”

Jacob has recently secured his dream job as a Student Support Officer at Nuriootpa High School.

want to learn about his path to where he is and how he got there, even with a disability, because that can make us even better workers!” said Charlie.

Charlie does not let anything hold him back and is passionate about helping others. He volunteers at the Lyndoch CFS, which he enjoys everything about, especially the banter! Charlie also has a part-time job at Lyndoch Motors where he proudly let us know he turns up on time and hasn’t missed a shift.

“Charlie is a talented lad”, said John Hughes, “he does amazing sculptures using his welding skills, and has a real talent in drawing. I am looking forward to mentoring Charlie and looking forward to helping him create opportunities to use his skills further in the Barossa community.”

The Youth Council

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 this year's Ambassadors, presenting their recommendations on this year's Community Grant applications 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.

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.

Foundation Barossa provides support to the students in the form of a Mentor. The Mentors are part of the Foundation Barossa Scholar Alumni. The role of the Mentor is to provide and share knowledge about Foundation Barossa, and philanthropy and raise awareness of some of the organisations and partners that we work with. As well as providing support, these are important opportunities for students to learn first-hand about Foundation Barossa and the social issues it aims to address in our community. The Mentors are local young positive role models who will be able to share the background of their scholarships, their time, and enthusiasm.

One of the Mentors for Tanunda Primary School is Ruby Harris. Ruby was awarded a Foundation Barossa Scholarship in 2020 to study at the University of South Australia. Ruby wanted to be able to give back to the community that has supported her. Ruby said, *"I am currently studying for a Bachelor of Primary Education (Honours) and thought this program would be an amazing experience to mentor young people, and support them in voicing their perspectives to create positive change. I was fortunate enough to receive a scholarship from Foundation Barossa, who has supported me with additional University expenses, hence, this mentorship program is a great opportunity for me to give back to the community by supporting my student Ambassadors."*

We are extremely grateful to David Thomas who has sponsored this program for the next five years.

Community Grants

Four projects focused on improving the health and wellbeing of our community were put forward by the Youth Council in 2021.

The projects address key needs, build community strength and find collaborative solutions to community problems. Community Grant applications must benefit the Barossa community and reflect the values and objectives of Foundation Barossa around community, inclusiveness and nurturing.



1. Youth Homelessness Home Starter Package

The program will provide young people moving into independent accommodation with essentials like small appliances, kitchenware, linen and bedding.

2. Greenock Cricket Club All Abilities Cricket Program

This is a short-term program to help juniors of any skill level, particularly those with a disability, to learn the skills of cricket. The program gives kids who may not otherwise be able to experience sport the

opportunity to connect, have fun and belong. It will create an inclusive and supportive environment that embraces diversity and will facilitate meaningful contact between the club and the community.

3. Garden Gatherings for Wellbeing at the St Petri Hand in Hand Family Centre

The centre's outdoor area will turn into a usable vegetable garden and cooking area. They will run community gardening days and increase children and adults gardening knowledge. The project will aim to get people outside, socialising and

meeting people. It will also teach skills that will contribute to physical and mental health.

4. Nuriootpa High School's Breakfast Club

The funding will be used to increase their capacity for storage of breakfasts and take-home meals for students and families requiring support during times of crisis, financial hardship, family dysfunction, or emotional breakdown. The club provides the school's 1400 students with a morning meal, a place of connection and a positive start to the school day.

Photo: Community Grant Hand in Hand Garden for Wellbeing

The Peter Lehmann Arts & Education Trust

The Peter Lehmann Arts and Education Trust (PLAET) was launched in 2014 to nurture and sustain the artistic and cultural fabric of the Barossa by providing access and education to a wide range of arts and cultural activities.

The trust came about to memorialise Peter Lehmann, a true son of the Barossa and supporter of all aspects of Barossa culture and heritage.

Foundation Barossa oversees the administration of PLAET together with an advisory committee made up of members of the Lehmann family and Foundation Barossa Board.

Foundation Barossa awarded 11 projects sharing in \$ 25,590 in the fourth round of PLAET grants in 2021.

As in previous years, the quality and diverse range of applications for arts, culture and history projects in the Barossa impressed the advisory panel.

"We're thrilled with not only the quality of this year's successful grant applicants, but also by the way separate enterprises cross over, interweave and reinforce that the Barossa really IS a community tapestry," said David Lehmann.

The **Hill and Son Organ** continues to be a cornerstone of the grants. Four students received scholarships and mentoring, with Joshua van Konkelenberg continuing the Artist-in-Residence program with a series of concerts and come-and-try sessions.

Other projects funded in the round included:

1. A website to protect and conserve the **Cultural Heritage of the Light Pass** while conserving and maintaining Rechner Cottage.
2. The **Tutti QR Code** to reimagine the interaction between the artist and audience by sharing the meanings of the artworks from artists with disabilities.
3. Oral history recordings of the people and stories behind the **Barossa Cook Book** being written by Those Barossa Girls.
4. **Speak 100 Barossa Stories** capturing 100 Barossa Stories as artist "self-portraits" to be developed into a podcast.
5. Publishing Rebekah Rosenzweig's detailed **History of the Barossa Vintage Festival**.

“Being a PLAET grant recipient is always a privilege and an honour. But for Tutti Arts Barossa, it is much more. It’s knowing that our Barossa community supports the Tutti artists, especially when we take on new artistic initiatives that will enhance access to the arts for everyone. Additionally, the Tutti artists are recognised as leaders in the contemporary arts space”

Alexandra Devitt-Lansom, Tutti Arts



Top: Ashleigh Rushton, Tutti Artist

Right: Dr. Joshua van Konkelenberg (Artist in Residence Hill & Son Organ) & Margaret Lehmann at the Hill & Son Organ Come & Try Session



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Corkage for a Cause

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Give a Little More Barossa Soup Kitchen



Give A Little More Barossa, the heart-warming initiative raising funds for the community, returned to Barossa Central again in 2021.

Every Tuesday in August, a selection of Barossa's most renowned chefs dished up a fast and delicious lunch option that offers more than meets the eye. Each purchase went directly to support the prevention of youth homelessness with funds going to the Homburg Homelessness Prevention Fund.

By buying a cup of soup at 'Give A Little More Barossa' during the month of August, people helped Foundation Barossa break down barriers and provide opportunity, dignity, and support for life-changing programs in the community.

The Give A Little More Barossa soup kitchen was established 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 2021 culinary teams were:

- Sam Smith and Amy Dunleavy, Fino, Seppeltsfield
- Tim Bourke, The Eatery
- Mark McNamara and Ruby Stobbart, Kind Hearted Kitchen
- Clare Falzon, Hentley Farm
- Kyle Johns, Appellation

"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 the community and held for the 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.

We would like to thank Sam Smith for his incredible support of this program and all the chefs and sponsors involved. Your passion and generosity will allow Foundation Barossa to continue to drive real and lasting change in the Barossa for those that need it most.

Photo: Give a Little More Soup Kitchen

PHIL & THROPE & Corkage for a Cause

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



In 2022 two notable SA winemakers were selected to produce two extraordinary wines to support Foundation Barossa's philanthropic endeavours, an Eden Valley Riesling made by John Hughes at Rieslingfreak and a Barossa Valley Shiraz by David Lehmann at david Franz.

How's that for a game of two halves? A deliciously fine wine, from a renowned winemaker, benefitting those in need!

Photo: Tutti Artists Johanna Roberts & Gemma Brett

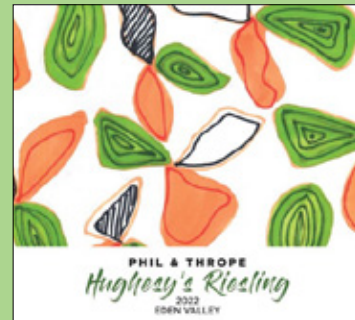
2022 Hughesy's Eden Valley Riesling



This Riesling uses parcels from the Zander and Mason family, located in Flaxman Valley, along with components from the Tscharke and Bartholomaeus vineyards, residing high up in Eden Valley. Hughesy's Riesling is fruit driven with generosity on the palate and poised for ultimate enjoyment on release.

Crafted by the "Riesling Freak" himself - John Hughes of Rieslingfreak.

The artwork is also pretty special being created by a wonderfully talented Barossa Tutti artist Johanna Roberts.



\$ 200 / Dozen (plus freight)

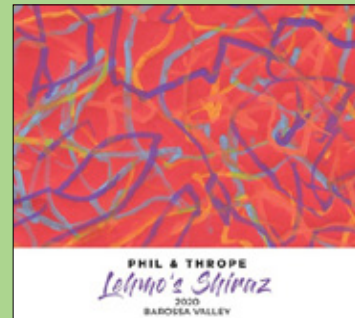
Purchase: <https://rieslingfreak.com/shop/phil-thorpe-2022-hughesys-eden-valley-riesling/>

2020 Lehmo's Barossa Valley Shiraz



Made by David Lehmann of David Franz. This three-barrel blend, selected from their Bultawilta, Horse Paddock and House on the Hill Blocks, combine to create a fresh and vibrant Barossa Shiraz, with hints of boysenberry compote and spice box.

The artwork is also pretty special being created by a wonderfully talented Barossa Tutti artist Gemma Brett.



\$ 200 / Dozen (plus freight)

Purchase: <https://david-franz.com/collections/all/products/2020-david-franz-phil-thrope-shiraz>

Sponsors

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

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

Corkage for a Cause

In its third year, Corkage for a Cause was again supported by local bars and restaurants in the Barossa who donated their corkage or tasting fees on November 22nd 2021 to support our young carers in the region.

Christmas can be a difficult time for young carers. There is often not much opportunity just to be a kid when you have parents or siblings affected by disability. Families can struggle

to find the time, resources and capability to care for these young people.

The Appeal raised \$ 13,630 for Carers & Disability Link so young carers between 5 and 17 years old can participate in a recreational camp. The camps were designed to assist with building morale and confidence, fostering self-esteem and developing self-worth. But mainly it gave these young people the opportunity to have some fun and be a kid.

Treasurer's Report 2021/22

Financial Position

The financial position of Foundation Barossa decreased in the 2021/22 financial year largely as a result of challenging global investment conditions and emerging concerns about the global economy, including, but not limited to the Russian invasion of Ukraine, soaring inflation rates and China's continuing zero Covid policy which is impacting economic output in that country.

Fund balances across the four Foundation Barossa entities totalled \$ 2,105,630 as at 30th June 2022, a decrease of \$ 192,419 (-8.4%) on the previous year. The decrease was driven by a decline in the market value of investments by \$ 297,480. Income from donations, sponsorship and ArtLease totalled \$ 171,909. Net realised investment returns after fees were \$ 149,719 (an average return of 6.5%) were offset by scholarships, grants and distributions totalling \$ 172,271 and operating expenses of \$ 75,660. In addition, refunds from imputation credits for the last four years were received totalling \$ 31,363.

Open Fund

The Open Fund closed with a year-end balance of \$ 21,429, with a net outflow of funds for 2021/22 of \$ 13,714. Excluding distributions from the Barossa Region Community Foundation Trust (Public Trust) made via the Open Fund, annual operating expenses increased \$ 10,125 (+15.4%) on the previous year to \$ 75,660, equating to 3.6% of total net assets as at 30 June 2022 (vs 2.9% for FY21). This increase was driven by the decision to increase our Executive Officer's hours from three to four days a week, which was funded by a generous donation from Robert O'Callaghan and Pam O'Donnell to support the additional costs for five years until December 2026.

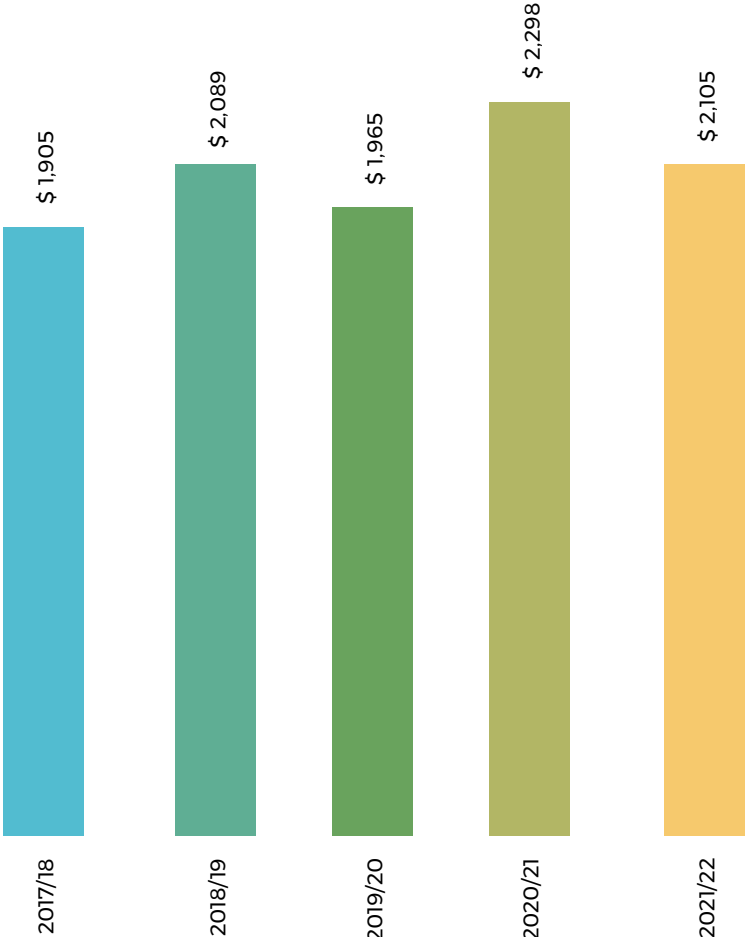
Foundation Barossa operations were funded by inter-entity administration fees of \$ 30,331 (Barossa Education Trust \$ 22,491 and PLAET \$ 7,840), sponsorship & donations of \$ 36,450 and the ArtLease program contributed \$ 1,250.

Barossa Education Trust

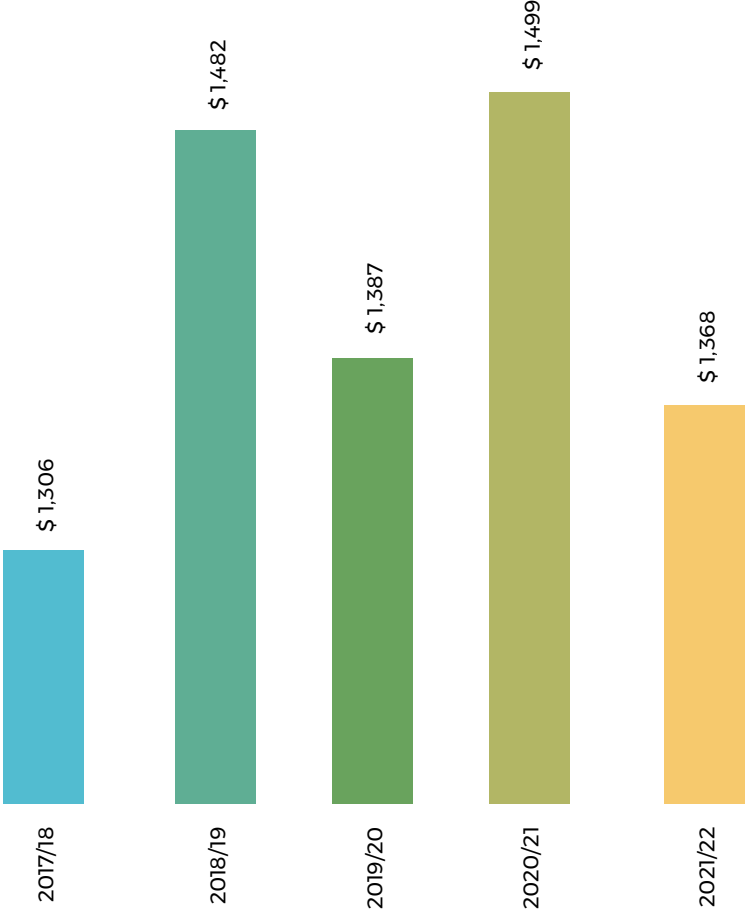
The funds under management in the Barossa Education Trust funds decreased by \$ 131,071 (-8.8%) to \$ 1,368,341. This was driven by a decline in the market valuation of investments of \$ 213,263 (-14.2%), which was offset by investment income after fees of \$ 116,806 at an average return of 7.8% and external donations totalling \$ 18,492. In addition, a refund of imputation credits was received totalling \$ 25,168 and an internal management fee of 1.5% of the corpus, or \$ 22,491 was paid to the Open Fund.

The Education Trust distributed a total of \$ 59,283 across seven educational programmes comprised of the following scholarships – Concordis Social Inclusion \$ 22,562, Thomas \$ 25,500, Cellarmasters \$ 3,000, Elderton Wine Excellence \$ 1,500, Barossa Bands \$ 1,500, Kicking Goals \$ 1,000 and our newest scholarship, Dr. Ben Baker \$ 2,000.

Total Funds
(\$ '000)



Barossa Education Trust
(\$ '000)



Peter Lehmann Arts & Education Trust

The Peter Lehmann Arts & Education Trust (PLAET) funds under management decreased by \$ 44,005 (-8.4%) to \$ 478,660 due to a decrease in the market value of investments of \$ 74,138 (-14.2%). This was offset by investment income after fees of \$ 33,135 at an average return of 6.3%, donations of \$ 26,162 and refunded imputation credits of \$ 6,195. Grants were awarded to eleven recipients totalling \$ 27,520.

Public Fund

The Barossa Region Community Trust (Public Trust) funds decreased \$ 3,629 (-1.5%) to \$ 237,199. This was driven by an unrealised decline in the market value of investments of \$ 10,079, and a net increase in the Homburg Homelessness Prevention Fund (donations less expenditure) of \$ 11,418.

Excluding the contribution made towards two relocatable studios from the Homelessness Fund, a total of \$ 30,780 was distributed back to the community as follows:

- Christmas Appeal \$ 13,630
- Back to School Vouchers \$ 5,000 *
- Barossa Australia Wellbeing Fund \$ 2,600
- Community Grants \$ 6,050
- Barossa Bands Scholarships \$ 1,500 **
- Dr. Ben Baker Scholarship \$ 2,000 **
- Total Distribution \$ 30,780

As the corpus of the Public Trust, excluding the Homelessness Fund reached \$ 100,000 this financial year, the decision was made to invest these funds in a similar manner to the Education Trust and PLAET in the second half of the year.

Unfortunately the timing was poor, with investment markets subsequently collapsing, resulting in an unrealised decrease in market value. However, these funds are invested with a long-term conservative view and should recover in due course.

Sub Fund Balances

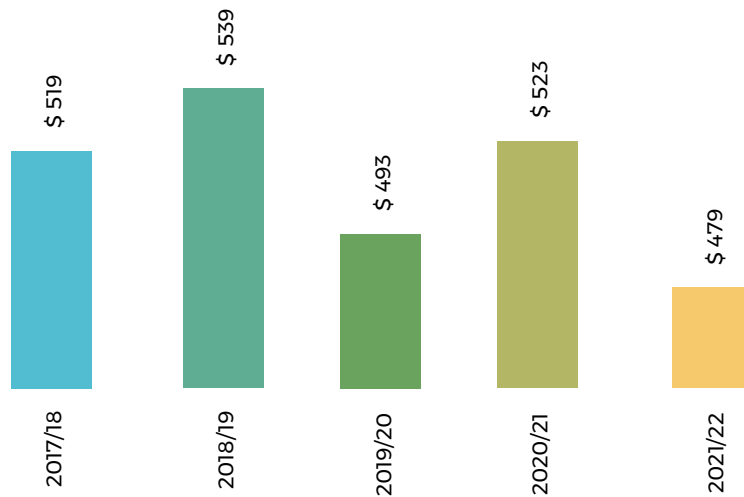
FY22 saw a decrease in the market value of the most sub funds reflecting the decline in investment markets in the latter half of the year. Those that declined in value were the Concordis Social Inclusion Fund (-\$ 67,130), Thomas Scholarship (-\$ 56,809), Elderton Wine Excellence Fund (-\$ 5,846), and the Barossa Australia Well-Being Fund (-\$ 5,494). The Homburg Homelessness Prevention Fund was one exception (+\$ 7,480) which is held in cash deposits due to the intention to distribute 100% of these funds.

The Kicking Goals sub-fund also increased in value (+\$ 1,323) due to additional donations being received.

* Matched funding distributed as \$ 10,000 in vouchers

** Paid via the Education Trust

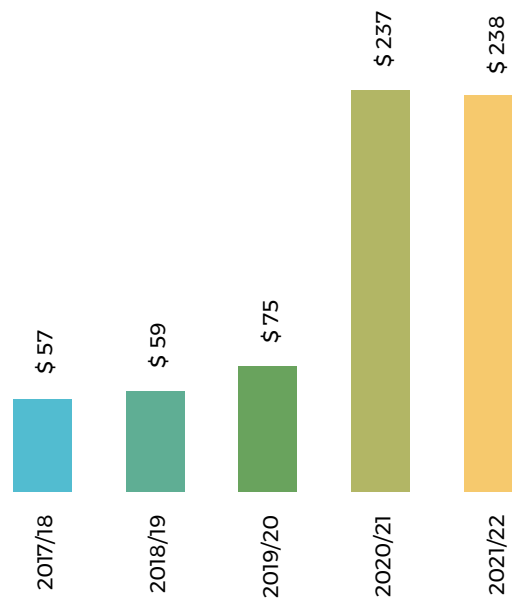
Peter Lehmann Arts & Education Trust (\$'000)



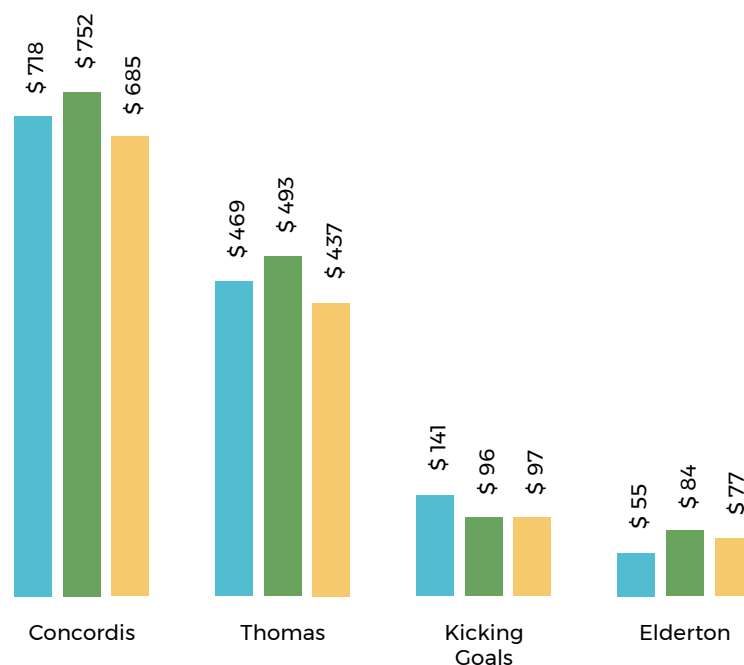
Public Fund (\$'000)

Christmas Appeal	\$13.6
Back to School Vouchers *	\$ 5
Barossa Australia Wellbeing Fund	\$ 2.6
Community Grants	\$ 6.1
Barossa Bands Scholarship **	\$ 1.5
Dr. Ben Baker Scholarship **	\$ 2
Total Distribution	\$ 30.8

* matched funding distributed as \$ 10,000 in vouchers
 ** paid via the Education Trust



Barossa Education Trust Sub Fund Balances (\$'000)



Governance

Investment Policy

FOUNDATION BAROSSA engage the professional services of W2 Wealth to provide advice (pro bono) on investment strategies for the Barossa Education Trust and Peter Lehmann Arts & Education Trust. Due to increasing administrative costs, W2 Wealth have commenced charging the Foundation an administrative fee of \$ 7,000 p.a.

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).

Audit

Following the retirement of EY last year, William Buck were engaged for the 2021/22 audit and have agreed to waive their audit fees.

The Board of Foundation Barossa would like to acknowledge the professional services and support from EY, W2 Wealth and William Buck.

Our board members



Neil Retallick
Chair



Nick Slape
Deputy Chair



Lisa Laycock
Incoming Treasurer



Angela Pickett
Incoming Secretary



Jenny O'Brien



Amy Heinicke



**Annabelle
Elton-Martin**



Simon Newbold



John Hughes




Abbey Underwood



**Annemaree
Clementson**



Karl Martin
Outgoing Treasurer



*In memoriam
of Foundation
Barossa
Board member*

**Frances (Fran)
Clancy**

*with gratitude for
her service to the
Barossa
community.*



Anthony Grundel
Outgoing Secretary



Lesley Ann Grimoldby
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.



Bequests

You can choose to leave a bequest to Foundation Barossa in your will. You might choose to leave your bequest freely - 'no strings attached' - so that the Foundation can apply the money to the area of most need. Or you might leave a bequest 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.

