

# ANNUAL REPORT 2021



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**FOUNDATION  
BAROSSA**

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

# What is a 'Community Foundation'?

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

## Community

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 change. 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.

Globally, our network of Foundations is located in Canada, New Zealand, the United Kingdom and the European Union.

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

# Our year of giving

27

Local students supported with \$55,544 in educational scholarships

8

Local students became the inaugural Youth Ambassadors for The Youth Council

4

Peter Lehmann Arts and Education Grants totalling \$14,675 were awarded to artistic and cultural projects in the region

11

Laptops donated by the community were provided to students

\$142,000

Raised for the prevention of youth homelessness in the region

3

Local businesses provided with \$24,000 worth of business coaching and mentorship scholarships

600

Local families supported with \$30,000 of vouchers across 13 schools through the FRRR Back to School Program



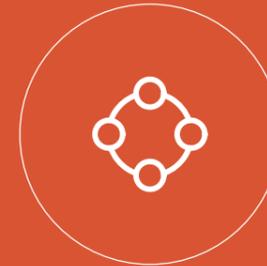
Top: at the back are Peter Rawlings (Marananga Town Band) and Lisa Laycock (Foundation Barossa Board), at the front are 2021 Barossa Bands Scholarship recipients Jasper Lobgeiger & Sophie Schutz.

Left: 2021 Thomas Scholarship recipients Ryan Noack & Kayley Boehm.

# 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.



Foundation Barossa  
aims to nurture and  
build our community's  
strength and assets...

## A message from the Chair

In a year when the Covid pandemic rendered all our lives less predictable, the Foundation was able to make progress across a number of important social equity issues.

THESE INITIATIVES were made possible by the generosity of those amongst us who are more fortunate and want to support those amongst us who are less fortunate.

The Covid pandemic brought into sharp focus the issue of homelessness in the Barossa, particularly of children and young adults. The community has responded very positively. The generosity of many local organisations has been overwhelming, reflecting the community spirit that has been a hallmark of our region for decades. These efforts have been further leveraged with Homburg Real Estate committing to an ongoing and very generous contribution. A partnership has been established with Kids Under Cover that will see a homelessness prevention program commence in the near future.

The BGWA Wellbeing Fund was refocussed during the year to the provision of Mental Health training in the wine industry. A very successful wine auction has allowed this program to commence ahead of schedule in late 2021.

A Youth Council has been initiated. In this first year, four schools have each identified two Youth Ambassadors. These Ambassadors are to assess the applications for our Community Grants program in October 2021. This is a wonderful opportunity for these young people to give their perspective on the social needs of their community. Some of the schools also conducted fundraisers to assist with the (yet-to-be) chosen projects.

The Kicking Goals scholarships program continues to provide opportunities for young people with a disability.

The Elderton Winemaking Scholarship attracted a number of candidates that reflected the work ethic, desire for success, personal development and Barossa engagement that the scholarship criteria required.

The Thomas Scholarships were awarded and we welcomed four new Mentors to support these recipients going forward. All four Mentors are community members and leaders, so it is wonderful to see this generous commitment to our community.

There were 17 recipients of the Concordis scholarships, indicating how widespread the disadvantage is in our community.

The Peter Lehmann Arts and Education Trust provided funding to support a number of cultural initiatives across art and music.

The second award of the Dr Ben Baker Memorial Scholarship was made and two young musicians received the Barossa Bands scholarships.

The ArtLease program has been extended to include a series of art exhibitions by Tutti Arts at the Angaston Medical Centre. A part of the proceeds from each piece sold is directed to the Foundation.

This year, the Foundation was able to distribute \$30,000 in Back to School vouchers, the most ever received. Again, this was made possible through the generosity of the Foundation for Rural & Regional Renewal and Barossa Real Estate.

The Annual Awards night held in late January was a celebration of the objectives of the Foundation. More than 100 people were allowed to attend (Covid restrictions applied) including Award recipients, sponsors and donors. We thank The Jam Factory once again for their hospitality.

Our subscriber database continues to increase. This is the best way to stay in touch with the activities of the Foundation.

I would like to express my thanks to our enthusiastic and very busy Executive Officer, Annabelle Elton-Martin, for her amazing contribution in the last twelve months. And to my fellow Board Members for their time and commitment to the purpose of the Foundation.

Finally, let me recognise the generosity of our sponsors, partners and donors, without whom nothing would or could be achieved.

**Neil Retallick**

...by responding to challenges and opportunities and supporting organisations and individuals to do likewise. Donor funds can be invested in perpetuity, and interest from these funds is distributed annually to local community groups.

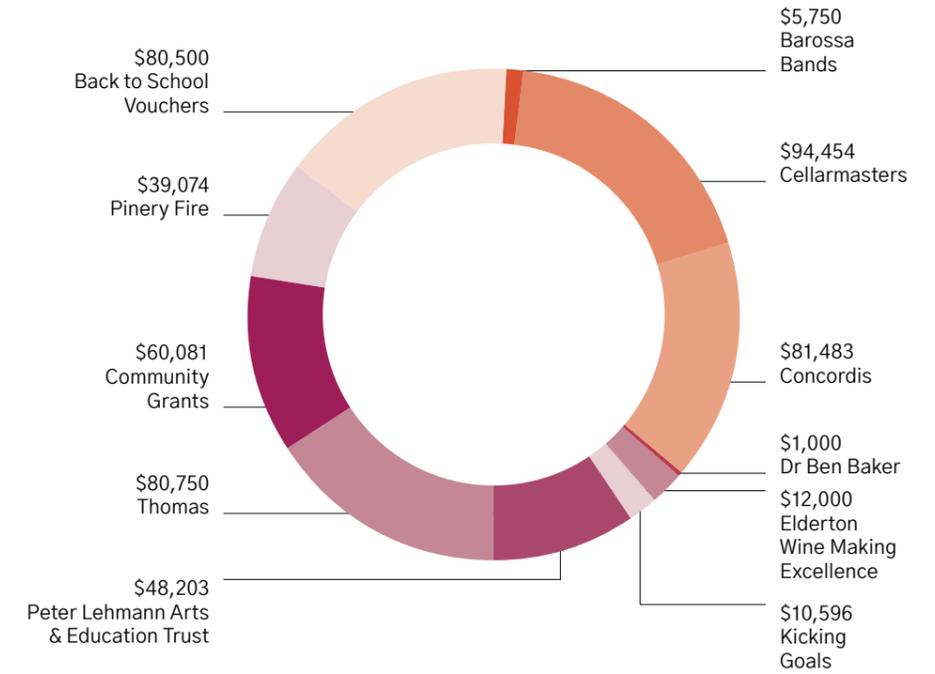
# Grants and Scholarships awarded in 2021

Foundation Barossa has awarded Scholarships and Grants from 2017–2021 in excess of \$513,891

Grants and Scholarships by Year



## Grants and Scholarships by Area



### Foundation Barossa Education Trust

Sub Fund	Amount
Thomas Scholarships	\$ 18,000
Concordis Social Inclusion Trust	\$ 28,544
Kicking Goals Scholaships	\$ 3,500
Dr Ben Baker Memorial Scholarship	\$ 1,000
Barossa Bands Scholarships	\$ 1,500
Elderton Winemaking Excellence Scholarship	\$ 3,000
<b>Total</b>	<b>\$ 55,544</b>

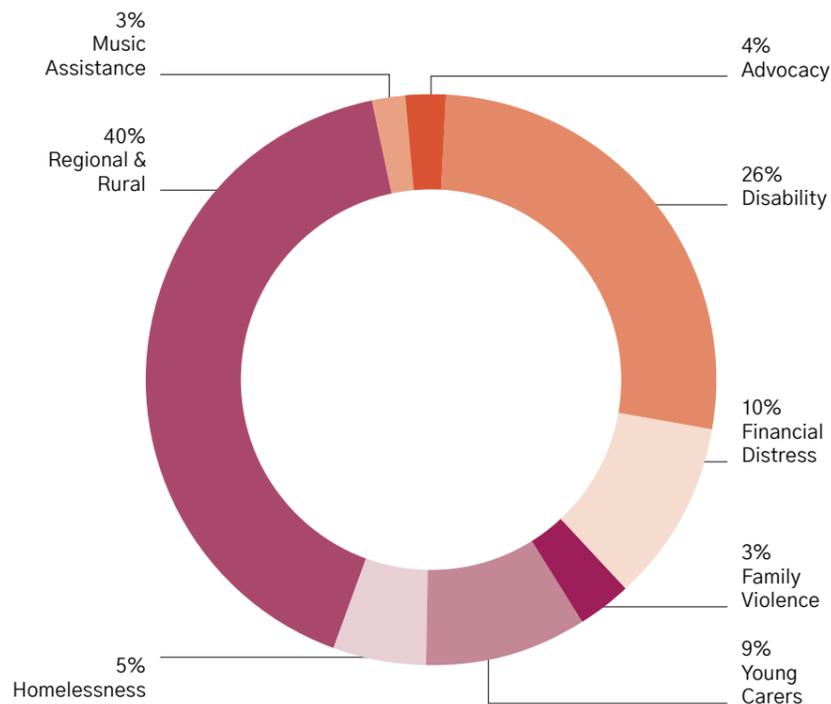
### Peter Lehmann Arts & Education Trust

Barossa Bushgardens Acquisitive Sculpture Prize	\$ 5,000
BBBfm	\$ 375
Hill & Son Organ Artist in Residence	\$ 5,000
Heritage Trail App	\$ 4,300
<b>Total</b>	<b>\$ 14,675</b>

### Areas of Study Funded by the Scholarships



### Scholarship Recipients Application Reason



# Our Programs

## Back To School Vouchers

THE BACK to School initiative is part of the Foundation for Rural & Regional Renewal (FRRR) Program. Foundation Barossa has partnered with 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 and school bags and stationery or anything that helps the students feel ready to learn. The vouchers are more than a \$50 gift. The program is about social inclusion and resilience, building confidence and morale in disadvantaged children. This year we have been able to contribute an unprecedented \$30,000 to this initiative. With this, we were able to provide 600 vouchers to the families that needed them most.

We are thrilled to announce the new sponsorship partnership with Barossa Real Estate who will provide annual sponsorship of \$5,000 that will be matched by FRRR. The generosity of Barossa Real Estate will allow us to expand the program so more school aged children will have the dignity and opportunity to start the school year with the basic resources they need.



## Kicking Goals

THE SCHOLARSHIP is designed for students with a disability, assisting with the last year/s of high school, and providing them with financial assistance going into further education or employment.

John Hughes, Winemaker/ Owner of Rieslingfreak, established the Kicking Goals Scholarship in collaboration with a number of local businesses.

John has slight Cerebral Palsy and has always wanted to create a Scholarship that enables a student with a disability to progress their ambitions. The Kicking Goals Scholarship is designed to facilitate further education for a student in the Barossa region with the ultimate goal being employment.

Hamish Gabel and Jessica Kendel from Nuriootpa High School are the 2021 Kicking Goals recipients. Both students are in Year 12 and have big ambitions for the future.

Jessica's mother, Sue said "Jessica is very excited and looking forward to navigating her way into life after school. Being given this opportunity to work alongside John will give her the opportunity and the support she will need to succeed. We are very grateful that she has been chosen and will have every chance to fulfil her dream of being an active member of the community and achieving her goals. Being a young girl with a serious disability, without this wonderful scholarship from Foundation Barossa it would have been very difficult for her to find her best pathway into adult life. The next couple of years will certainly be a challenge for Jessica and we may have a few bumps along the way. We look forward to supporting Jessica and working closely with Foundation Barossa and John in setting up Jessica for the best outcome in the future."

Local business has been helping to fulfil those ambitions.

Hamish Gabel was one of the 2021 Kicking Goals recipients. Hamish has always dreamed of working with cars.

"Cars are a passion for me, ever since I was a little guy. Working with motors, building, taking apart and rebuilding, is something that I want to do for the rest of my life, and this is why becoming a mechanic is the pathway for me after I finish at Nuriootpa High School Inclusive Education Centre," said Hamish.

We want to acknowledge and say a big thank you to the team at Barossa Valley Collision who gave Hamish the opportunity of work experience which has now become regular casual work after school. Alex, from Barossa Valley Collision was happy to share "Hamish is a quiet achiever, he has shown himself to be reliable and dependable. He is on time and quick to get to work and is always ready for his next task."



"Hamish is a quiet achiever, he has shown himself to be reliable and dependable. He is on time and quick to get to work and is always ready for his next task."

## The Peter Lehmann Arts & Education Trust

THE THIRD round of Peter Lehmann Arts and Education Trust (PLAET) grants saw four successful projects share in \$14,675. These were chosen from a diverse range of applications that demonstrated the breadth and depth of the arts, culture and history in the Barossa.

1. Funding is supporting the development of a Barossa Heritage Trail App. The app is to include seven digital walking, cycling and driving tours and trails of Barossa towns. It will promote Barossa’s heritage and share heritage experiences with the local community and visitors.

2. Local community radio station BBB fm received funding for a CD titled ‘Musical Creatures of Valleys and Plains’ featuring 15 local artists. The CD supports the growth and development of the music careers of the artists and develops links with the community.

3. Josh van Konkelenberg conducted an intensive residency at the Hill & Son Organ building on outcomes of 2020 mentorships. This included two workshops for amateur organists, a public masterclass for Barossa-based organists and pianists and a concert.



4. The Barossa Bush gardens have hosted 10 SALA exhibitions over the last 11 years. This has established and enhanced the connection between the local natural environment and the art scene in the Barossa. The Bushgardens used the grant to establish an acquisitive

sculpture prize conducted during the SALA Festival. The Barossa Regional Acquisitive Sculpture prize will support, promote and raise awareness of the local art community in a unique setting.

## Homburg Homelessness Prevention Fund



YOUTH HOMELESSNESS is not a new issue in the Barossa but the numbers have been steadily increasing. For young people at risk of homelessness, a space to call their own is life changing. Foundation Barossa launched The Foundations Project to fund the first Kids Under Cover youth homelessness prevention studio in the Barossa and create seed funding for a long-term sustainable solution.

Foundation Barossa has been overwhelmed with the extraordinary generosity of the Barossa community. Funds have been raised from school fundraisers, donations from individuals and companies, the Vine Inn Community hotel golf day, community groups and even children donating their pocket money. Many cellar doors, bars and restaurants took part in Corkage for a Cause with all corkage or tasting fees being donated to The Foundations Project.

Homburg Real Estate and Foundation Barossa have announced the launch of the new Homburg Homelessness Prevention Fund. This fund will be used to build youth prevention homelessness studios in the Barossa from Kids Under Cover and facilitated by Foundation Barossa. Homburg donate to the Fund with every property they sell and every new rental property they lease. Based on the average of their annual sales and new rental listings, this program could achieve an annual donation in excess of \$30,000. This is an incredibly generous contribution which will make a significant difference to some of the most vulnerable members of our community. Joint Principal of Homburg, Guy Draper said: “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.”

The Homburg Homelessness Prevention Fund is an incredibly important step in our shared vision that no young person in the region need experience homelessness.

In July we received the amazing news that Casella Family Brands was donating \$40,000 to the Fund. Their spokesperson, Frankie Harding stated, “With youth homelessness numbers in the Barossa steadily increasing, we are proud to be able to provide assistance and support Foundation Barossa in their vision to address this issue through the Homburg Homelessness Prevention Fund. We hope our contribution will make a meaningful difference to some of the most vulnerable members of the Barossa community. We extend our heartfelt thanks to the team involved in bringing this worthy cause to our attention, and for all of the hard work that is happening behind the scenes to make the youth homelessness prevention studios a reality.”

We would like to thank everyone who has been involved for being part of this important initiative to help some of the most vulnerable in our community. We hope our contribution will make a difference to the lives of these children.

“I want to help my peers have a voice in the community and to have a say in issues that affect us now and in the future”

Abbey Mattner, Youth Council Ambassador



## The Youth Council

FOUNDATION BAROSSA has introduced a new program aimed at students between Year 7 to Year 10 called The Youth Council. The Youth Council is a program for school students to inspire and help shape the future of our community.

The Youth Council program provides the students, called 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 an exposure to community issues and opportunities to take up responsibilities, contribute to solutions and ultimately, make a difference.

In this first year we have Youth Council representation from Nuriootpa High School, Faith Lutheran College, Tanunda Primary School and Redeemer Lutheran School. Nuriootpa High School's Youth Council Ambassadors are Jack Herzich and Abbey Mattner.

Jack is a year 10 student who is passionate about helping the community. In 2018 Jack was awarded the “Community Service Award” at his primary school graduation. Jack has training as a crossing guard, works in the canteen daily and has multiple other qualifications. Abbey, who is a year 8 student said, “I want to help my peers have a voice in the community and to have a say in issues that affect us now and, in the future.”

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.

## Build business coaching and mentorship

THE BUILD Small Business Scholarships offer two programs, each for four months, presented by NextLevel Up Business Coaching and Mentoring. Through these, Foundation Barossa is investing in the long-term health and resilience of the community by promoting education and encouraging achievement.

Past recipient Tania Materne of Barossa Physiotherapy said of the impact of the scholarship: “The momentum is still happening and without pressure to make it happen. With clear goals and tools to make them happen, the stress is reduced but the goals are being met and this leads to not just success but fun while we are doing it. Thank you Foundation Barossa for the opportunity you have provided me and my team. And thank you for the expertise, the patience, the encouragement and the life-changing tools you have given me.”

Congratulations to our 2021 recipients of Keira Stone Speech Pathology and Resolved Mediation Services. We look forward to following your progress.

# Treasurer's Report 2020/21

THE FINANCIAL position of Foundation Barossa recovered strongly in FY21, following a decline the previous year due to negative investment returns resulting from the economic impact global markets felt from the Covid pandemic. Fund balances across the four Foundation Barossa entities totalled \$2,298,049 as at 30th June 2021, an increase of \$333,435 (+17%) on the previous year. The increase was driven by Barossa Education Trust and Barossa Region Community Trust (Public Trust) with donations of \$246,248, net investment returns after fees of \$195,396 at an average return of 10.5%, offset by scholarships and distributions totalling \$92,995 across both trust funds.

The Barossa Education Trust funds under management increased by \$112,591 (+8%) to \$1,499,412. This was largely due to net investment returns after fees of \$146,498 at an average return of 10.74% and donations totalling \$50,000. The Education Trust distributed a total of \$63,385 across 6 educational programmes comprised of the following scholarships – Concordis Social Inclusion +\$33,181, Thomas \$16,750,

Cellarmasters \$9,454, Elderton Wine Excellence \$1,500, Barossa Bands \$1,500 and Kicking Goals \$1,000.

The Peter Lehmann Arts & Education Trust (PLAET) funds under management increased by \$29,578 (+6%) to \$522,666 largely due to net investment returns after fees of \$48,898 at an average return of 9.66%. Grants were awarded to four recipients totalling \$14,675.

The Barossa Region Community Trust (Public Trust) funds increased \$166,032 to \$240,828. This was driven mainly by \$121,008 in seed funding for the new Homburg Homelessness Prevention Fund and an additional \$53,825 in seed funding for the BGWA Wellbeing Fund. A total of \$29,610 was distributed back to the community, including \$1,500 for educational scholarships made via the Education Trust (Barossa Bands).

## Sub Fund Balances

FY21 saw an increase of \$333,425 across all sub funds, with major increases reported for Homburg Homelessness Prevention Fund (+\$121,005), BGWA Well-Being Fund (+\$53,825), Concordis Social Inclusion

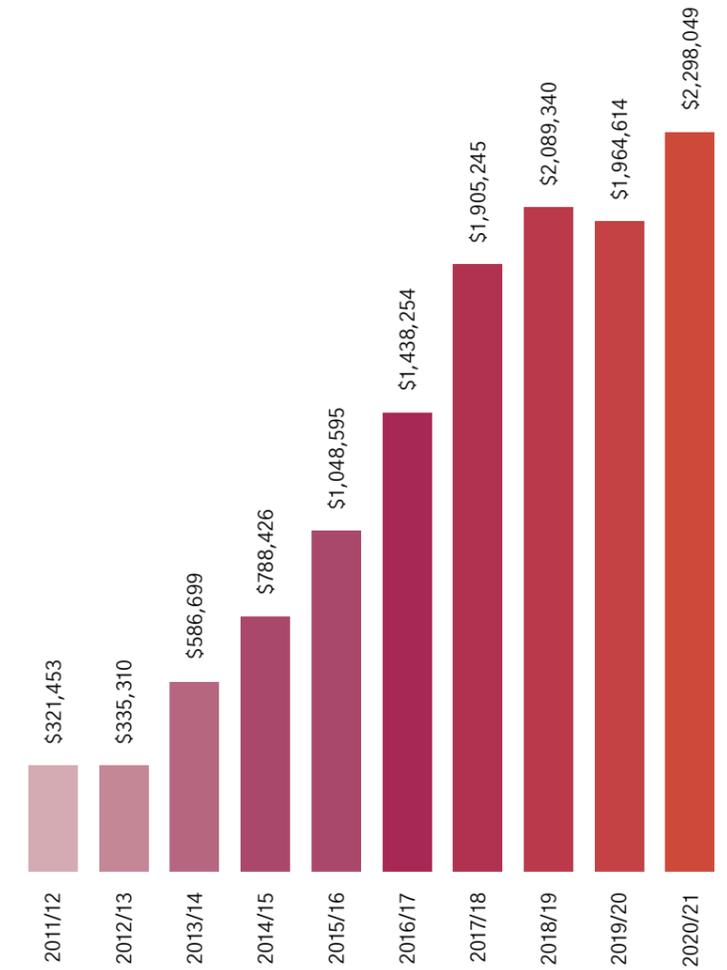
Fund (+\$33,181), PLAET (+\$29,578), Elderton Wine Excellence Fund (+\$28,697), Thomas Scholarship (+\$25,508) and Kicking Goals (+\$15,506).

## Barossa Region Community Foundation Incorporated (Open Fund)

The Open Fund closed with a year-end balance of \$35,143, with a net surplus for 2020/21 of \$25,237. Excluding distributions from the Barossa Region Community Foundation Trust (Public Trust) made via the Open Fund, annual operating expenses increased \$3,232 (+5%) on the previous year to \$65,903, equating to 2.9% of total net assets as at 30 June 2021 (vs 3.2% for FY20).

Foundation Barossa operations were funded by – administration fees \$27,919 (Barossa Education Trust \$20,524 and PLAET \$7,396), sponsorship & donations \$17,210, Art Lease \$1,091 and government stimulus programmes \$34,900.

## Foundation Barossa Fund Balance



## 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, with total funds under management averaging \$1,869,666 for 2020/21. 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

EY were once again engaged for the 2020/21 audit and have continued their support by agreeing to waive their audit fees.

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

## Foundation Sponsors

Barossa Quarries  
Thorn Clarke Wines  
Wine Architect

## ArtLease

The Vine Inn  
Rockford Wines

## Gifts in Kind

Barossa Campus  
Jam Factory  
Australia Wide Badges  
Fuller  
AON  
EY  
W2 Wealth

## Partners

Rieslingfreak Kicking Goals Scholarship  
Vinpac / Cellarmasters Cellarmasters Scholarship  
Barossa Wine & Grape Association BGWA Wellbeing Fund  
Elderton Barossa Elderton Wine Making Excellence Scholarship  
FRRR Back to School Program  
Barossa Real Estate Back to School Program  
Angaston Medical Centre Dr Ben Baker Memorial Scholarship  
Kaesler Wines Concordis Social Inclusion Trust  
Torbreck Vintners Concordis Social Inclusion Trust  
Two Hands Wines Concordis Social Inclusion Trust  
Seppeltsfield Concordis Social Inclusion Trust  
Homburg Real Estate

## Corkage for a Cause

Torbreck Vintners  
Fermentasian  
Rieslingfreak  
D’or to Door  
Yelland & Papps  
Greenock Creek Wines  
Appellation & Bar three75  
Char Barossa  
Peter Lehmann Wines  
Two Hands Wines  
Kaesler Wines  
Seppeltsfield  
Yalumba  
Fino at Seppeltsfield  
Jacobs Creek  
Henschke  
Ember Pizza  
Harvest Kitchen  
Barossa Valley Brewing

# Our board members



**Neil Retallick**  
Chair



**Nick Slape**  
Deputy Chair



**Karl Martin**  
Treasurer



**Anthony Grundel**  
Secretary



**Lesley Ann Grimoldby**



**Lisa Laycock**



**Annemaree Clementson**



**Angela Pickett**



**Jenny O'Brien**



**Amy Heinicke**



**Annabelle Elton-Martin**

Foundation Barossa's main reason for being is to support people and causes close to home and close to the heart.



# 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.



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

**Annabelle Elton-Martin**  
Executive Officer  
[info@foundationbarossa.org.au](mailto:info@foundationbarossa.org.au)

You can donate now

