

2021-2022

# Annual Report



**Geelong  
Community  
Foundation**

Giving. Forever.

# Our history:

The idea of establishing a Community Foundation in Geelong was first considered in 1997 through United Way Geelong (now Give Where You Live). The United Way Board felt that there could be support in Geelong to develop a significant fund with a permanent capital base, which if invested well, would grow substantially. A portion of the annual income could then be used to make charitable grants. It was felt that a fund would be of great benefit to the Geelong region.

Geoff Neilson, who at that time was a partner of Day Neilson, was requested to head up a committee to investigate the Community Foundation concept. After due consideration and community discussion it was decided to proceed and form the Geelong Community Foundation to cover the City of Greater Geelong, the Surf Coast and Golden Plains Shires and the Borough of Queenscliffe.

The Foundation was publicly launched in December 2000 and a number of those on that initial Committee became Directors with Geoff Neilson being the founding Chairman.

In those early years, it was known that Ken Stott, a local, wished to ensure that his assets stayed in the Geelong community. Geoff Neilson offered Ken Stott the opportunity to become a donor to the fledgling Foundation and Ken responded by making an initial donation of \$2 million. He made further gifts and since that time his two Sub Funds with capital growth have increased to around \$13.2 million.

Ken passed away in October 2005 and his name will live on forever as the inaugural and a major donor to the Foundation.

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# Geelong Community Foundation 2021-2022

## Our Year at a Glance

Donations received



**\$1.7M**

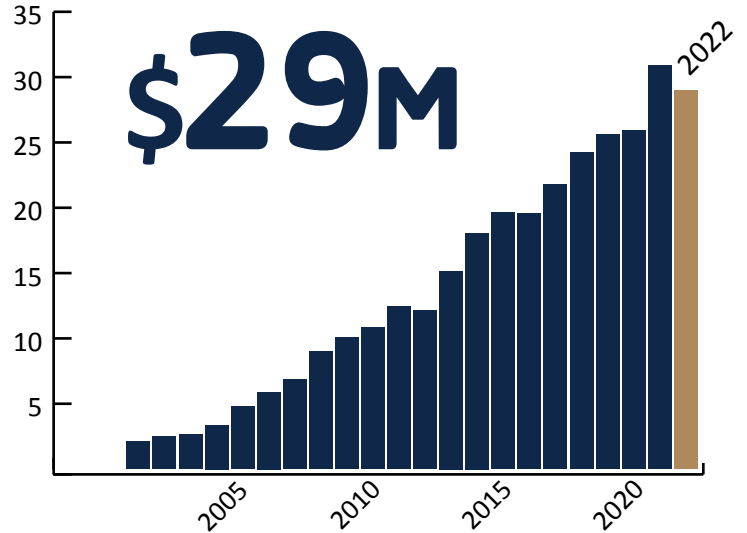
**5 YEAR**

Investment  
return

**9.5% PA**

Total Funds under management

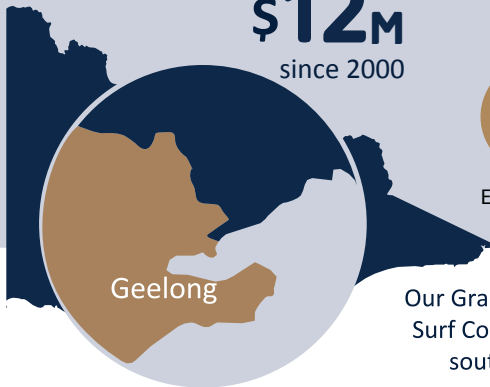
**\$29M**



Community Grants paid

**\$1.27M**

**\$12M**  
since 2000



Aged Care



Community  
Wellbeing



Training &  
Education



Family



Environment



Health



Heritage  
& Arts



Research &  
Innovation



Youth

Our Grants cover the City of Greater Geelong, Surf Coast Shire, Borough of Queenscliff and southern part of Golden Plains Shire.

Administration expenses

**1.3%** 

Of funds under  
management.



**Geelong  
Community  
Foundation**

Thankyou

**21** NEW Sub Funds

**195** Sub Funds

**237** P500 Donors  
(2021 campaign)



# Our principles:

## VISION

To be recognised as the most influential leader in philanthropy in the Geelong Region.

To be a Foundation that is of sufficient size to be able to contribute to the wellbeing of the community and effect positive, long term change.

## PURPOSE

The Geelong Community Foundation exists to make a lasting difference to people in the Geelong region.

## AIMS

- Encourage giving by creating awareness and providing information, advice and support to new and existing donors.
- Manage and invest funds prudently, to achieve fund growth and good returns.
- Make grants for the long-term benefit of our community and evaluate their effectiveness.
- Provide a simple, cost effective way to make substantial donations.
- Be part of new initiatives and achievements in community building.
- Maintain professional standards, service and transparency to the community.

## ROLE

The Geelong region has needs which are not being met from other funding sources. The Geelong Community Foundation encourages individuals, families, corporates and other organisations to make donations to meet these needs, now and in the future.

These donations are retained as capital by the Foundation to build a perpetual and substantial fund for philanthropic purposes, with only the income from this capital used to make local community grants.

## MISSION

The Foundation engages new and existing donors to increase the corpus.

Grants are given on the basis of community need, pathways and delivering behavioural change – delivering relief, resilience and self-sufficiency.

Due diligence is undertaken in all decisions.

## VALUES

- We have a strong donor-organisation relationship.
- We treat all donors with respect.
- We strive for excellence in all we do.
- We seek to be innovative and welcome new ideas.

# Chairperson's Report:



It is my great honour to present my first Chair's Report, since the retirement of Hayden Torney after his three year term as Chair, of the Geelong Community Foundation Ltd Board of Directors in October 2021. With some experience in the not-for-profit sector, it was an absolute pleasure to be elected to Chair a group of involved, dedicated and enthusiastic Directors.

This is perhaps the clearest indication of the quality of Hayden's work during his term as Chair. However, his contribution is still being made as a Director, active Committee member and also a leading contributor to the Foundation along with his wife Sally and his family. The

Foundation is deeply indebted to Hayden for the quality and quantity of his support for the Foundation.

It is also important that I acknowledge the contribution of Ed Coppe, who has stepped down from the Investment Committee of the Board. Ed was a long-term Director of the Foundation and since his retirement from the Board he has continued to assist the Board through the important work of the Investment Committee.

The Board passed a minute of appreciation for Ed's work over many years on his retirement in early 2022. Ed's service underlines that one of the great strengths of the Foundation is the dedication of non-Directors who serve on Board Committees. Ed has been succeeded on the Committee by Christian Ryan, who is already contributing strongly to the Committee's program.

In a perhaps simplistic sense, the role of the Board is focused on four key tasks:

- Continue to raise money for the Foundation,
- Effectively manage the Foundation's grants processes,
- Ensure that the Foundation is properly managed in an efficient and cost-effective way, and
- Oversee the investment policies established by the Board with the assistance of professional advisors.

I will comment briefly on each of these tasks.

With the exception of the gifts from our Founding Benefactor, Ken Stott, the Foundation has raised a record amount of money in the 2022 financial year of over \$1.7 million. We continue to see a growth in bequests, both in number and value, and we have welcomed 21 new Sub Funds during the year. The P500 program continues to grow in a way which has exceeded all expectations since it was first established in 2017. We believe that giving donors an in-depth role in the P500 grants process is absolutely fundamental to its success. It is also very pleasing that we continue to receive strong donations from existing donors who must recognise the strong contribution to the community our grants are making.

The 2022 financial year was also a record year for grants, with over \$1.27 million provided in grants to over 60 organisations in our region. Not only do we fund a general grants round, we also manage the Adroit Insurance & Risk Capital Grant, the P500 grant, Back to School vouchers and scholarships. We have developed rigorous grants processes and will continue to refine these each year. Again, a highlight of the grants process for the Board is the grants decided through the Schools in Philanthropy Program. We continue to be amazed by the quality of the decision-making processes adopted by the students and believe this program clearly benefits both the grant recipients and the students.

During the year, David Lindsay has stepped down as chair of the Grants Committee and has actively assisted Bridgette Kelly to assume that role. The work of the Finance, Audit and Risk Committee, so ably Chaired by Lachlan McColl, is a key component of our administration procedures.

A clear focus of the Board is to ensure that we manage the Foundation efficiently and effectively. Whilst we are very pleased that our administration costs have been 1.3% of our corpus, the Board also know that Gail and her team need to

be supported when clear needs are identified. During the 2022 financial year, we have welcomed Ally McManus in her role as Communications Officer with the understanding that we must embrace changing communications channels in the future to engage our donors to continue to grow our corpus.

Finally, some comments on our investment policies and procedures. Since inception of the Foundation, we have been guided in our investment processes by J B Were and in particular by Adam Blennerhassett and Michael Browne. In late 2021, we were advised of fundamental changes to the J B Were fee structure in 2022 and that led the Board to

conduct a limited tender for future financial advice. The tender process included J B Were and was overseen by Cameron White, Chair of the Board's Investment Committee. The tender led to a unanimous resolution of the Board to appoint Wilsons Advisory and Stockbroking Ltd as our new advisors.

At both Board level and personally, we have expressed the appreciation of the Foundation for the quality of the advice provided by J B Were over many years. The administrative transfer was implemented late in June 2022 and we acknowledge the constructive way Adam, Michael and their J B Were team facilitated the transfer to Wilsons Advisory. Chris Taylor and Peter Moran have attended their first Investment Committee Meeting and have supported the existing Investment Policy of the Board.

In an unrelated comment, I record that after many years of strong investment growth, equity markets across the globe suffered sharp declines in the last quarter of financial year 2022, meaning that our corpus declined slightly during that financial year. The Board, through its Investment Committee, has kept a very close watch on market conditions and had decided that no short-term changes to the Foundation's Investment Policy was required.

In closing, I record my appreciation to all Directors and co-opted members of Board Committees. Your diligence, dedication and support of the Foundation and its executive team is outstanding. To Gail, Tony, Gennette and Ally, my thanks for all that you do. The tasks we ask of you cannot be achieved without flexibility, cooperation and great teamwork. You are truly the engine that drives this remarkable organisation.

**Michael J Betts**  
CHAIRPERSON

# Treasurer's Report:



It has been another busy year for the Geelong Community Foundation family. Tremendous thanks to our staff, led by Gail Rodgers, generous donors, volunteers, Board Members, and our financial advisers. A particular shout out to Katie Terpstra for being our tireless keeper of the books.

Summarised below are the financial highlights for the year ended 30 June 2022, representing the combined or consolidated position for our three funds (referred to as the Gift, Open and Scholarship):

- **FUNDS under management:**  
\$27.9 million (2021: \$30.1 million)
- **DONATIONS:**  
\$1,773,130 (2021: \$1,134,356)
- **GRANTS paid:**  
\$1,271,000 (2021: \$1,043,100)
- **Investment RETURN:**  
- \$1,693,581 (2021: +\$4,480,658)
- **Operating EXPENSES:**  
\$384,952 (2020: \$366,772)

Presented on pages 32-33 of this annual report are the concise financial statements for the year ended 30 June 2022 for our three funds. Further detail can be found in the audited financial statements on our website.

Supporting our Chair's message, the generous support of donors including more than (237) P500 supporters, has resulted in donations in excess of \$1.7 million, being more than 56% higher than in 2021. These donations have contributed to our corpus ensuring we are giving, forever.

Our funds under management have declined approximately 7% from 30 June 2021, reflecting volatile stock markets globally in the last 12 months.

Despite the downturn, our distribution income (from dividends and fixed interest income) has increased \$690,104 year on year, or a 85% improvement.

"...donations in excess of \$1.7m, being more than 56% higher than in 2021."

The strong distributions from our funds under management, combined with generous gifts from our donors, has allowed us to increase our grants paid to community organisations. Our grants exceeded \$1.2 million in the year, an increase of approximately 22%.

As our Chair has mentioned, the transition from our long-standing financial advisers and supporters, JB Were, to Wilsons Advisory and Stockbroking has been smooth and professional. Special thanks to Michael Browne and Adam Blennerhassett from JB Were for their long term support.

Our operating expenses for the year increased moderately to support our growing presence in Geelong, with the addition of Ally McManus, our Communications Officer.

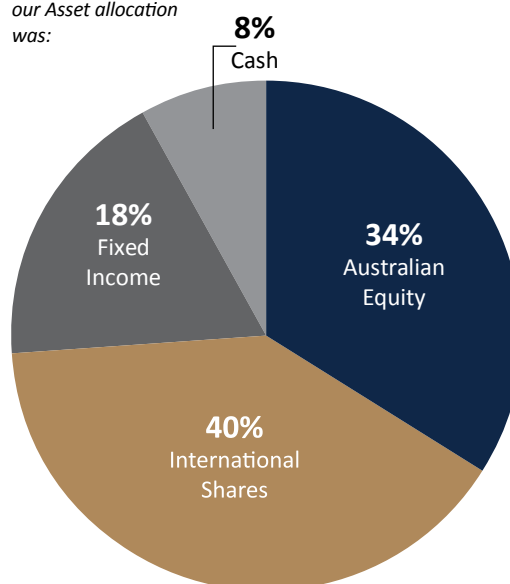
We continue to closely monitor our costs. Our administrative expenses represented 1.3% of consolidated net assets (2021: 1.2%).

My time as Treasurer and Chair of the Finance, Risk and Audit Committee has nearly come to an end.

And finally, thanks to Katie, Gail, Hayden, Michael, Tony, Gennette, Ally, Val and all other Board Members, P500 Committee and broader donor family for your support over the last nine years.

**Lachlan McColl**  
TREASURER

As at 30 June 2022,  
our Asset allocation  
was:





# Chief Executive Officer's Report:



After such a disruptive couple of years, it has been a pleasure to be back engaging face to face with members of our community. At the same time it has been a challenge for many organisations as they navigate the new normal, and for many, the ongoing demands on their service delivery to support those in need.

It is the stories that are shared, and the organisation's acquittal reports I read that continue to drive me and the team to focus on the growth of our corpus. The growth of grants to the community is a mirror of the growth of the corpus. I am so grateful for our generous community and our generous donors. \$5.3m in grants has been made to 268 organisations over the last five years. A contribution to the Foundation is a gift that will keep on Giving Forever.

Our small but effective team welcomed a new member in February – Ally McManus has been appointed as our Communications Officer. Ally will focus on content for all our media through engagement with grant recipients, donors and other key stakeholders. With Tony and Gennette, I am grateful for the support and the impact of the work undertaken by our passionate team.

Since I started with the Foundation some six years ago, I have had the pleasure of working with three great Chairpersons who have been so generous with their time and made a significant contribution to our organisation – John Miles, Hayden Torney and this year I have had the pleasure of working closely with Michael Betts. With a small team, I am thankful for the skills, knowledge and hands on role played by our Directors and Co-opted Committee Members who all give so freely of their time to contribute through their specific areas of expertise.

Page 35 of this report also lists our pro bono supporters and organisations that provide discounted assistance to the Foundation for which I am extremely grateful, ensuring we keep our administration costs low.

## 2021-2022 HIGHLIGHTS

The fifth year of P500, our giving circle, smashed our target and engaged 237 donors for the 2021 campaign (pages 12-13). Vote Night, to determine the grant recipient, was held online for the 2nd year. The \$68,000 grant was awarded to Geelong Youth Engagement after a passionate presentation regarding the organisation's new Strive Program, supporting vulnerable young people in our community. Simon Loader from Tract Consulting handed over the reins as Chair of the P500 Committee after two

“\$5.3m in grants has been made to 268 organisations over the last five years.”

fabulous years leading the very engaged team. I am grateful for the support of a fantastic volunteer committee with Cormac Hanrahan stepping up to lead the team for 2022.

The Geelong Funders Collaborative, established in 2018, has continued to engage funders from across a range of trusts and foundations, immersing them in the broader Geelong community. We held an online forum in September for organisations to engage with Melbourne based funders: Helen Macpherson Smith Trust; Australian Communities, Jack Brockhoff and Ian Potter Foundations. We also enjoyed engaging several local organisations at our meetings including BatForce, CoGG Social & Affordable Housing Plan and Geelong Food Relief Centre, to engage us on current issues.

Four local schools were part of our Schools in Philanthropy Program: Sacred Heart College, Christian College, Oberon High School and Surf Coast Secondary College (pages 26 - 27).

The Foundation continued to deliver a local \$102,000 'Back to School Program', providing \$50 Target vouchers to 46 primary and secondary schools across our region. The program is delivered in partnership with the Foundation for Rural and Regional Renewal (FRRR). We also received \$20,000 - Glover Family Trust and \$2,000 - William Angliss Charitable Fund to which the Foundation added \$50,000 and with \$30,000 from FRRR (page 25).

During the year we welcomed 21 new Sub Fund donors to the Foundation (pages 8-13). In summary, nine personal Sub Funds were developed, six Corporate, one In Memorium, one Group, two Gifts in Wills and two Scholarships. We have featured our Education Scholarships on page 24. The Scholarship Fund is a separate tax-deductible Fund of the Foundation, designed to lend a hand to students with their education costs. It is a unique Fund and appealing to those donors who have a passion for education.

Thanks to Adroit Insurance & Risk, our team is back in the office. The ongoing support the Foundation receives from Adroit is so valuable – we really enjoy being part of their team. Great to see the Adroit Golf Day back on again with the event held in March and Geelong Youth Engagement the recipient of the capital grant from funds raised, receiving \$75,000 to buy a bus to support their youth programs. Sincere thanks to the team at Adroit for their invaluable support of the Foundation.

**Gail R Rodgers**  
CHIEF EXECUTIVE OFFICER

# Collective giving

## NAMED SUB FUNDS WITHIN OUR FOUNDATION

We would like to thank all donors who have contributed this year and in past years. It is through your generosity and benevolence that your Foundation continues to grow and is able to effectively help our community. This great work is funded through your donations and gifts in wills.

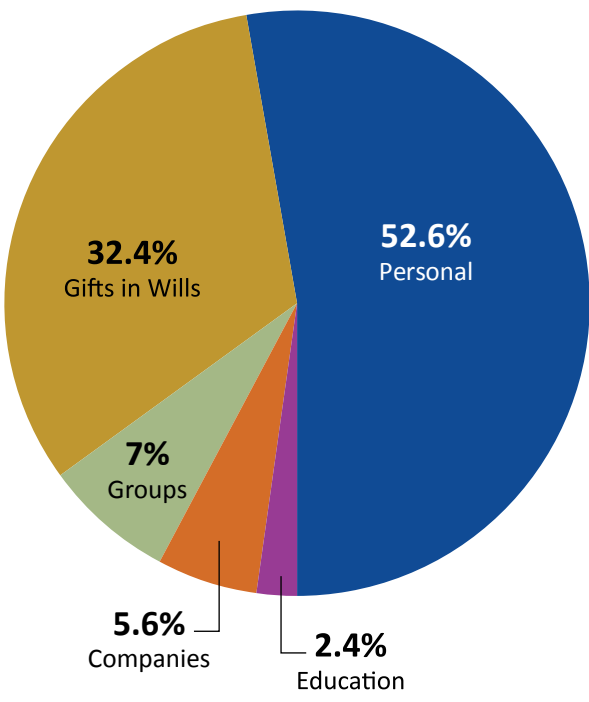
The Foundation has grown to 195 Named Sub Funds, with 21 new Sub Funds added in 2021/2022. We encourage contribution to these funds by our donors annually. We thank and acknowledge those individuals and organisations who have made the Foundation their partner in philanthropy.

We offer an easier way of giving that is tax deductible and carefully managed. By consolidating, investing and growing your donations, we are building long-term, reliable funding streams for your community. This way, you can make a bigger impact with your donation. You can add to it at any time. We aim to make grants only from the income, ensuring your generosity will have lasting benefits, now and forever.

You can open your own Sub Fund within the Foundation and watch it grow each year. Contributions to the Gift and Scholarship Funds are tax deductible and your gift will directly help the community where you live and or work. Sub Funds can carry the name of the donor, company name or the donor's family. The name may honour someone or preserve the memory of a family member, friend or outstanding citizen.

Your contributions will automatically grow in line with the Foundation's investment portfolio's performance. However, you can contribute to your Sub Fund as often as you like, to accelerate its growth and highlight this to your family, staff and customers.

## FUNDS SPLIT BY CATEGORY - 2021/22



FUNDS SIZE BY CATEGORY		2021/22	2020/21
Personal		\$15,423,034	\$16,726,068
Gifts in Wills		\$9,523,282	\$10,164,213
Groups		\$2,071,803	\$2,139,901
Companies		\$1,652,939	\$1,586,459
Education		\$719,008	\$417,954



Northern Bay College  
Scholarship



# Personal Sub Funds

- ADDITIONAL CONTRIBUTION **2021/22**  
- NEW FUND

FUND NAME	2021/22	2020/21
Kenneth Neil Stott Fund	\$7,825,200	\$8,780,585
Fagg Family Fund	\$1,605,851	\$1,791,376
Torney Family Fund	\$806,080	\$851,560
E F & W Dimmick Fund	\$276,552	\$310,399
Les & Trevor Cole Fund	\$224,510	\$251,984
Mark & Kathryn Osborne Fund	\$205,574	\$230,691
Fleur Nicholson Fund	\$195,275	\$219,101
Kitson Family Fund	\$162,588	\$150,339
Darryn Lyons Fund	\$151,277	\$169,783
Lino & Marina Bisinella Family Fund	\$145,136	\$162,898
Coltman Family Fund	\$142,805	\$160,289
Reilly Family Fund	\$131,489	\$129,465
Dr Haz Hussain-Yusuf Fund	\$124,732	\$129,470
James M Kavanagh Fund	\$121,554	\$136,485
Bailey Family Fund	\$109,133	\$122,534
Richard John Lyons Memorial Fund	\$107,755	\$120,912
DR & VJ Lawrence Fund	\$85,947	\$74,214
Singer Family Fund	\$80,542	\$79,791
Justin Van Laar Memorial Fund	\$77,168	\$79,200
Frank & Shirley Costa Fund	\$74,798	\$73,058
Antony Family Fund	\$71,297	\$74,726
Hayden Family Fund	\$69,413	\$77,938
Neville & Dianne Crane Family Fund	\$69,248	\$77,773
Fisher Family Fund	\$65,976	\$64,336
Yvonne Bernath Fund	\$64,658	\$72,571
Deam Family Fund	\$61,833	\$60,390
Geoffrey & Betty Betts Family Fund	\$59,718	\$67,017
Geoffrey Neilson Fund	\$59,355	\$65,572
Alan & Sheila David Family Fund	\$56,746	\$63,776
Anonymous No. 6 Fund	\$55,881	\$62,771
John & Prue Webb Fund	\$52,556	\$58,963
Geoffrey Neilson No. 2 Fund	\$51,981	\$0
G Wood Family Fund	\$51,053	\$51,954
Pam & Richard Austin Family Fund	\$49,393	\$55,391
Edwards Family Fund	\$48,419	\$54,392
HDL Fund	\$47,675	\$53,469
Crittenden Family Fund	\$47,193	\$0
Anonymous No. 7 Fund	\$44,976	\$47,790
WH & A Huffam Family Fund	\$44,456	\$44,436
Ed & Sharon Coppe Fund	\$41,838	\$45,919
Ray Frost Family Fund	\$41,006	\$35,304
Locke Family Fund	\$40,553	\$45,453
J & G Gulli Family Fund	\$39,103	\$38,548
Gary & Heather Work Family Fund	\$37,857	\$37,228
Fahey Family Fund	\$37,713	\$0
Bruce & Rosemary Robinson Fund	\$36,869	\$34,961
Corless Family Fund	\$35,618	\$39,978
Nash Family Fund	\$35,161	\$39,424
Michael & Louise King Family Fund	\$34,506	\$38,769
Patrick & Ann Rowan Fund	\$34,283	\$37,875
Quarrell Family Fund	\$32,865	\$36,923
H & M Munday Fund	\$32,559	\$36,618
Henderson Family Fund	\$32,232	\$36,186
McIldowie Family Fund	\$30,934	\$34,713
Anonymous No. 9 Fund	\$30,582	\$28,850
Bell Family Fund	\$29,484	\$22,608
Anonymous No. 5 Fund	\$29,266	\$32,916
Tim & Mary Farley Family Fund	\$28,716	\$32,237
Dowling Family Fund	\$28,523	\$26,668
Brockman Family Fund	\$28,325	\$31,770
Phil & Mary Maxsted Fund	\$27,809	\$31,179
JG Moffatt Fund	\$27,386	\$30,831
Seller Family Fund	\$26,698	\$29,863
Yeaman Family Fund	\$25,334	\$17,822
Anonymous No. 1 Fund	\$24,632	\$25,006
Surf Coast Charitable Fund	\$24,511	\$22,245

FUND NAME	2021/22	2020/21
McManus Family Fund	\$23,957	\$24,292
T & H Santalucia Family Fund	\$23,558	\$15,903
Draper Family Fund	\$21,809	\$21,161
Dr James & Dr Jane Tiernan Family Fund	\$21,522	\$11,059
Radcliffe Family Fund	\$20,893	\$22,346
Pete Johnston Fund	\$20,684	\$23,158
Murray Family Fund	\$20,671	\$17,650
Max & Nancy Neagle Fund	\$20,214	\$12,087
Sun Family Fund	\$20,091	\$22,544
Michael & Roslyn Betts Family Fund	\$19,888	\$11,650
Gary & Jenny Hodgson Family Fund	\$19,666	\$22,014
Burnett Family Fund	\$18,846	\$0
PA Caldwell Fund	\$18,342	\$20,665
Ross & Jan Synot Family Fund	\$18,256	\$19,410
Jan & Leigh Douglas Fund	\$16,974	\$13,716
Illingworth Family Fund	\$16,867	\$18,910
Anonymous No. 8 Fund	\$16,246	\$18,186
WAM Fund	\$15,992	\$18,007
Ramia Family Fund	\$15,916	\$17,931
Barber Fund	\$15,861	\$17,801
Allen Family Fund	\$15,857	\$17,721
Hudson Family Fund	\$15,828	\$16,743
John O'Shannassy Fund	\$15,526	\$12,087
RLB Fund	\$14,867	\$16,678
SS & J Neville Fund	\$14,579	\$16,389
Rob & Wendy Learey Family Fund	\$14,564	\$10,894
Louise Gourlay Fund	\$13,781	\$14,991
Goldsworthy-Davey Family Fund	\$13,505	\$13,040
Williamson & Baulch Families Fund	\$13,397	\$14,032
George Family Fund	\$12,078	\$13,084
Bourke Family Fund	\$12,029	\$13,459
Swanborough Fund	\$11,934	\$13,364
MJ & HJ Fraser & JW Brownbill Fund	\$11,905	\$12,335
O'Shannassy Family Fund	\$11,324	\$12,830
A & A Lawson Family Fund	\$11,144	\$12,395
Denis & Denise Peacock Family Fund	\$11,137	\$12,464
Balaam Family Fund	\$11,023	\$12,275
Adam Montgomery Family Fund	\$10,904	\$6,854
Alfred Swan Fund	\$10,838	\$12,087
Embrace Awareness Fund	\$10,795	\$11,571
Brian & Elizabeth Wood Fund	\$10,521	\$11,447
Agar & Whitehead Family Fund	\$10,453	\$10,604
John Holmes Family Fund	\$10,439	\$11,666
Carl & Vicky Schokman Fund	\$10,363	\$11,590
Ralph Sacks Memorial Fund	\$10,152	\$9,303
Baines & Lansdell Family Fund	\$10,039	\$9,165
Freda & Graham Wright Fund	\$9,534	\$0
James Family Fund	\$9,480	\$0
Nick & Emma Lord Family Fund	\$9,469	\$0
Marian Wills Cooke Memorial Fund	\$9,355	\$0
Dean & Angela Holroyd Family Fund	\$9,354	\$0
Angelo Kakouros Fund	\$9,078	\$7,471
Adambray Fund	\$8,548	\$9,645
Bain Family Fund	\$7,075	\$7,968
Dudgeon Family Fund	\$6,480	\$3,596
Robinson Family Fund	\$6,210	\$6,952
Alsop Family Fund	\$5,965	\$6,178
Peter & Annette Tanner Family Fund	\$5,947	\$6,586
Stewart Family Fund	\$5,538	\$6,226
P & G Rodgers Family Fund	\$5,510	\$4,298
Kelly-Baranski Family Fund	\$5,304	\$4,841
Greg & Kerrie Crawford Fund	\$1,896	\$2,442
Terpstra Family Fund	\$1,859	\$0
Scott & Cassie Lyons Fund	\$1,041	\$1,245

# Gifts in Wills Sub Funds

We invite you to consider including the Geelong Community Foundation in your will. Gifts in wills donations make up a third of our assets and have helped us give \$12 million in grants since we started in 2000.

It is a misconception that only “rich” people leave money to charity in their wills. The reality is, many gifts in wills are made by every-day, hardworking people who want to make a positive difference in their community and to other people’s lives.

Some are not able to give as freely during their lives as much as they might like to, so leaving a gift in a will is their final gesture of generosity and thanks to their community. Leaving a gift in your will to the Foundation is a great way to support the community after you are gone, with your gift working forever.

## Education Scholarship Sub Funds

The Foundation has a separate tax deductible Fund to support donors who are interested in supporting individuals and their education. Donors can establish an Education Scholarship Sub Fund that can support individuals in general education or a particular field of education studies such as agriculture, horticulture and engineering, for example.

The Foundation advertises its scholarships annually and interviews applicants to determine the need and best placement of the scholarships that are available. Donors can choose to be involved in the interview and decision-making process.

## Group Sub Funds

The Foundation provides the opportunity for Group Sub Funds to be developed. It might be a community group like a service club or a group that relates to a geographic region, a particular group of people or a particular impact area that the Foundation supports.

In the past we have been able to support organisations or entities that have folded but have reserves in their financial accounts. The establishment of a Sub Fund in this instance means that the organisation’s name and a description of the work it has undertaken in the community will live on forever even though the entity no longer exists.

- ADDITIONAL CONTRIBUTION 2021/22  
- NEW FUND

GIFTS IN WILLS SUB FUNDS	2021/22	2020/21
K N Stott Family Estate Fund	\$5,442,767	\$6,013,667
Lesley Yvonne Taylor Estate Fund	\$1,442,616	\$1,593,924
Margaret Ann Cody Estate Fund	\$1,355,690	\$1,497,887
Ian James Tyler Estate Fund	\$280,904	\$310,390
Fred & Pauline Flanagan Estate Fund	\$255,486	\$282,224
Norma & Grenville (Rod) Roddick Estate Fund	\$243,000	-
Harold Ernest Leighton Estate Fund	\$130,743	\$144,464
Robert Andrews Leggatt Estate Fund	\$121,237	\$133,993
M & J Donnellan Estate Fund	\$94,691	-
William Garth Little Estate Fund	\$73,884	\$81,650
Howard Hitchcock Estate Fund	\$44,865	\$49,534
Annie Johneena McLean Estate Fund	\$24,527	\$23,538
J C Bowen Estate Fund	\$12,872	\$14,183

EDUCATION SCHOLARSHIPS SUB FUNDS	2021/22	2020/21
Boland-Speight Student Support Fund	\$258,039	-
Northern Bay College Scholarship Fund	\$184,891	\$125,896
Allison Murphy Memorial Scholarship Fund	\$99,671	\$126,184
Ron Thompson Scholarship Fund	\$58,648	\$62,922
The Rural Education & Retraining Scholarship Fund	\$24,343	\$26,931
J & C Gulli Scholarship Fund	\$23,927	\$24,327
Miles Family Scholarship Fund	\$20,435	\$12,241
Dorothy Jean Scholarship Fund	\$19,014	\$21,256
Tom & Irene Cleary Memorial Scholarship Fund	\$16,806	\$13,898
Backwell IXL Scholarship Fund	\$9,404	-
Jason Breen Scholarship Fund	\$3,796	\$4,043

GROUP SUB FUNDS	2021/22	2020/21
Corio Community Contact Fund	\$675,716	\$746,623
Geelong Northern & Eastern Suburbs No 2 Fund	\$468,057	\$517,162
P500 Fund	\$282,670	\$255,751
Administration Fund	\$218,425	\$171,210
Community Fund	\$206,499	\$198,648
Geelong N. & E. Suburbs Fund	\$157,412	\$176,642
AllStar Youth Basketball Scholarship Fund	\$31,977	\$29,255
Rotary Club of Highton Fund	\$21,168	\$23,449
Mayor & Councillors Fund	\$8,973	\$7,640
South Western Golf Association Fund	\$906	-

- ADDITIONAL CONTRIBUTION 2021/22
- NEW FUND

## Company Sub Funds

More and more businesses are taking an interest in corporate social responsibility and choosing to give back to the local community. Participating in social good is important to the community, customers and staff.

There are many large companies already doing great things in the Geelong region. Setting up a Sub Fund through the Geelong Community Foundation provides an easy way to join them.

You can open your own Sub Fund in your company's name and watch it grow every year, directly helping the community where you operate. It will have all the benefits of your own company foundation, without the cost and workload.

Your contributions, which are tax deductible, will automatically grow in line with the Foundation's investment portfolio's performance. However, you can contribute to your Sub Fund as often as you like to accelerate its growth. This can be done through direct contributions or by creating linked service or product revenue streams at your discretion. Thank you to these partner companies:

COMPANY SUB FUNDS	2021/22	2020/21
Adroit Insurance & Risk Golf Day Fund	\$632,485	\$644,415
Backwell IXL Fund	\$214,821	\$198,762
Adroit Insurance & Risk Fund	\$208,403	\$233,836
McHarry's Buslines Fund	\$121,643	\$136,572
Whyte, Just & Moore Fund	\$52,272	\$53,379
Geelong Galvanizing Community Fund	\$47,193	-
Muirfield Financial Services Fund	\$42,023	\$41,803
Findex Geelong Fund	\$32,822	\$36,880
Wendy Brooks & Partners Fund	\$30,497	\$23,642
Valley Inn Community Fund	\$25,035	-
APCO Fund	\$23,204	\$26,036
Wightons Lawyers Fund	\$21,133	\$23,686
Wheeler Financial Services Fund	\$20,640	\$23,192
QEST Infrastructure Group Fund	\$20,526	\$12,087
Dennis Family Ashbury Community Fund	\$15,630	\$12,087
LBW Business & Wealth Advisors Fund	\$14,347	\$15,057
Lake Imaging Fund	\$14,340	\$16,150
Advisory Partners Fund	\$11,644	\$13,074
Value ADE (McColl) Fund	\$11,638	\$10,864
Davidsons Fund	\$11,367	\$9,293
Mann Legal Fund	\$10,369	\$6,094
Trevor Homes Group Fund	\$10,363	\$11,590
Natural Selection Group Fund	\$10,362	\$11,588
SIPCAM Fund	\$9,480	-
Hamlan Homes Fund	\$9,476	-
Coulter Legal Fund	\$7,307	\$7,049
Prestige Jayco Fund	\$6,760	\$4,376
RAPP Aust Pty Ltd Fund	\$5,281	\$5,894
Compton Green Fund	\$3,393	-
PWS Advisory Group Fund	\$3,154	\$3,488
Landserv Fund	\$3,041	-
ANZ Geelong Fund	\$2,290	\$2,495





# P500

Philanthropy is for everyone; everyone should have the opportunity to create positive social change in their community. Philanthropy 500 (P500) was established in 2017 to engage new donors who are keen to support our community and experience first-hand the high impact of collective giving.

The P500 collective giving program is a powerful mechanism that pools the \$500 donations of a group of like-minded people that will make a lasting difference in the Geelong region through an annual grant to a community organisation.

At the same time, we are building the P500 Endowment Fund for the future from which 4% (ATO requirement) of the value of the Sub Fund, as at 30 June each year, is added to the P500 grant annually.

The recipient of the P500 grant is decided by donor vote. Every donor who provides a \$500 contribution to the annual program is invited to an event in November to hear and

be exposed to the funding pitch from the three shortlisted organisations that have applied for the P500 grant. The organisation with the most donor votes receives the grant.

Through this process, donors have a say about where their donation goes as well as being immersed in the work of three community organisations.

For more information about this program, visit [www.geelongfoundation.org/giving/philanthropy500](http://www.geelongfoundation.org/giving/philanthropy500)

## P500 GRANT RECIPIENT 2021

In 2021, the P500 Grant was awarded to Geelong Youth Engagement. The grant of \$68,000 is for the implementation of their new “Strive” program, which is designed to support vulnerable, young people who have an array of challenges including truancy, drug and or alcohol abuse, anti-social behaviour, family violence and mental health issues, among others. This program is mainly targeting Year 10 & Year 11 students, aged 15-16.



# P500 Donors

## 2021

Anthony Aitken & Sue Minchinton  
 Aaron Walley  
 Adam & Caitlin Jaques  
 Adrian Blades  
 Alice & Elli  
 Alistair Sutherland  
 Ally Deam  
 Amanda Jennings  
 Amy Gillett  
 Anonymous 1 x 10  
 Anonymous 2  
 Andie Hamblin  
 Andrew & Elina Wilson  
 Andrew, Jen & Angus Torney  
 Angela Simpson  
 Anthony Papalia  
 Ashley & Carolyn McHarry  
 Austins Wines  
 B & J O'Shannassy Family  
 Bain Family  
 Baker-Ogden Family  
 Baranski Family  
 Barnett Property  
 Barry & Jan Fagg x 2  
 Bell Family x 2  
 Bellchambers Family  
 Bennett Merriman  
 Bernadette McCartney  
 Bernard Jordan  
 Beth King  
 Birch Family  
 Black Family  
 Blanche & Ashley Denmead  
 Bouch Family  
 Breella Case  
 Brian & Sue Case x 2  
 Bridgette Carey  
 Broadhead Family  
 Bruce & Sue Harvey  
 Bryn Kelly  
 Bula Bula Family  
 Cabinetmakers Choice  
 Caitlyn & Kelvin  
 Caleb Plumridge  
 Caroline Leng  
 Charlie Mackinnon  
 Chris Fagg  
 Cody Craven  
 Connolly Family  
 Cormac Hanrahan  
 Coulter Roache  
 Cranage Family  
 Cube Financial Group  
 David McDonald  
 David Myers  
 Davidson Family  
 DCST John  
 Deb Stallard  
 Dowling Family  
 Dunlop Family  
 Edwina Arto  
 Elena Szymanski  
 Elizabeth Gulli-Raimondo  
 Elizabeth Hewitt  
 Elsworth Family  
 Emily Torney  
 Emma Hollaway  
 Evolution Design Agency  
 Frank Pluim

Frیده Family  
 Gail Rodgers  
 Geraldine Tripodi  
 Gillian Holroyd  
 Gilmore Girls  
 Goop Digital  
 Gordon Family  
 Goulding Family  
 Graham Thomson  
 Great Ocean Properties  
 Great Ocean Road Chiropractic  
 Gregor & Jess Teague  
 Grigg Family  
 Hamilton Morello  
 Hayden Baker  
 Hayden Torney  
 Hayley Umbers & Corey Gastaldon  
 Helen Jordan  
 Helen Paull  
 Helen Roberts  
 Helen St John  
 Hoogwegt Australia  
 IPA Geelong Discussion Group  
 Jack & Rachel Perry  
 James & Georgie Fuller x 2  
 Jan Glover x 2  
 Jane Osborne  
 Jarrott Family  
 Jason Smith  
 Jemma Fox  
 Jennifer Henderson  
 Jenny Yeats  
 Jeremy Williams SC Tech. Group  
 Jewell Family  
 Joan Sykes  
 John O'Shannassy  
 Joske Family  
 Judith Kennedy  
 Julie Edmonds  
 Kate Colak  
 Kate Seiz (Picnic Season)  
 Kathryn Osborne  
 KC Treecare  
 Keith Fagg  
 Kerry Betts  
 Kieran O'Dwyer  
 Kieser Geelong  
 Kim Henderson  
 Kylie McEwan  
 Laurelle Cecic  
 Lauren & Nick Betts  
 Leaf Corporation Pty Ltd x 4  
 Leanne & Sergio Cinerari  
 Lesley Duncan  
 Linda Craven  
 Lindsay Dudgeon  
 Lions Breakfast Club Geelong  
 Lisa and Scott Nadorp  
 Lisa Baker  
 Little Green Corner  
 Liz McRae  
 Loacker Campbell Family  
 Loader Family Trust  
 LoanMarket Geelong  
 Lock Family  
 Luke & Phoebe Mullaly  
 Lynette Wood  
 M K Browne and Family  
 Mackenzie Family  
 Mackie-Coop Family  
 Margarita Senioritas  
 Marissa Szabo  
 Mark Duggan  
 Mark Osborne

Martin & Sarah Reid  
 Mathew Dickens  
 Matt & Emily Torney  
 McCann Family  
 McColl Family  
 Melinda Planken  
 Merriman Family x 2  
 Michael De Stafano  
 Michael Ryan & Simone Martonhelyi  
 Mick & Helen Statham  
 Miranda Luby  
 Muirfield Financial Services  
 Natural Supply Company  
 Nick Walsh  
 O'Neill-Schlank Chartered Accountants  
 Pat Murnane  
 Peron Family  
 Pete Johnston  
 Peter & Felicity Spear  
 Phil Barrett  
 Porra Family  
 Preston Rowe Paterson Geelong  
 Provincial Media  
 Pugh Family  
 Rachael Parker  
 Ralph Menchise  
 Renee Work  
 Richard Anderson  
 Rigoni Family  
 Rob & Emily Scarlett  
 Rob and Fiona Threlfall  
 Robinson Family  
 Robyn & Lloyd Smith  
 Robyn Little  
 Rodger & Lois Baker  
 Rodgers Reidy  
 Rona Reivers  
 Ross & Lyn George  
 Sally Torney  
 Sandiford Family  
 Scared Heart VCAL Students  
 Schofield Family  
 Shearman Jackson Family  
 Shona De Forest  
 Simon B Antony  
 Sodomaco Family  
 Solve Consulting  
 SRC Air Conditioning Pty Ltd  
 Statham Family  
 Stephen Brooks  
 Stewart and Imogen Lyons  
 Stockdale & Leggo South Barwon  
 Sue Lawson  
 Susanne Cleary  
 Tamara Carman & Nick Carter  
 Taryn Fisher  
 Theresa McManus  
 Thomas Davey  
 Tim Osborne  
 Todd Devine  
 Tom Butters x 2  
 Tony McManus  
 Tribeca Financial  
 Ula Majewski  
 Verity Fisher  
 Victoria Murrihy  
 Vithu Sripragasam  
 Wendy Brooks & Partners  
 Wesley & Fletcher  
 West Geelong Chiropractic  
 Whitworths  
 Whyte Just & Moore x 2  
 Windows by Geoff Case x 2



# Grants - 2022/23

In 2022, the Foundation received 98 grant applications seeking almost \$3 million in funding. Our community has an incredible depth and diversity of organisations that are here to help and provide support to people in our community. Many of these organisations have been developed locally, by local people who have identified a need or gap in local service delivery.

Evaluation of the applications is a process that takes many weeks, delivered by the Foundation Grants Committee comprising Board Members and two co-opted community members. The process provides a valuable insight into the complexity of need and the resourcefulness of many organisations who provide help.

The grant applications undergo strict review and require accountability and clear identification of the need

within the community on which the organisation is focused to support. We also take into account the areas of interest expressed by our donors.

The funds available for grants are dictated by our results at the end of each financial year. Our annual grants program opens for applications early December, closing mid-February. The review takes some weeks with every application reviewed against a set of criteria. Successful grant recipients are announced at our Annual Grant Reception in May and grants are paid to donors before 30 June. Grant applications far exceed our allocations budget but as our Foundation grows, thanks to our generous donors and gifts in wills, our capacity increases to grow the pool of funding available.



*Cottage by the Sea  
Grant recipient 2021/22*

# Grants Allocation Summary - 2022/23

## AGED CARE

Anam Cara House Geelong	\$50,000
Bellarine Community Support Register	\$12,500

## COMMUNITY WELLBEING

Art of The Minds	\$15,000
Barwon Disability Resource Council	\$20,000
Bellarine Living and Learning Centre	\$20,500
Bravehearts Foundation	\$5,000
Cloverdale Community Centre	\$20,000
Drysdale Family Support (SpringDale Community Garden)	\$4,000
Encompass Community Services	\$13,000
Feed Me Bellarine \$50,000 (year 1) \$50,000 (year 2)	
Geelong Food Relief Centre	\$30,000
Geelong Mums	\$15,000
Healthy Minds Geelong	\$10,500
Hope Bereavement Services \$45,000 (yr 1) \$45,000 (yr 2)	
Lazarus Community Centre \$33,000 (yr 1) \$25,000 (yr 2) \$20,000 (yr 3)	
Lifeline Geelong & South West Victoria	\$10,000
Norlane Community Initiatives	\$30,000
Ocean Grove & District Men's Shed	\$3,600
OneCare Geelong	\$25,000
Riding for the Disabled Barwon	\$10,000
Rosewall Neighbourhood Centre	\$5,000
Samaritan House Geelong	\$15,000
Sirovilla	\$25,000
The Empowerment Challenge	\$23,000
The Power in You Project	\$40,000

## EDUCATION AND TRAINING

Barwon Adolescent Task Force	\$30,000
CatholicCare Victoria \$20,000 (2nd year of 2 year grant)	
EdConnect	\$17,200
Geelong Region Local Learning & Employment Network	\$15,000
Northern Futures	\$40,000
Skyline Education Foundation	\$20,000
The Song Room \$35,000 (2nd year of a 2 year grant)	
Volunteering Geelong	\$17,500

## ENVIRONMENT

Anglesea Aireys Inlet Society for the Preservation of Flora & Fauna (ANGAIR)	\$10,000
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## FAMILY

Bethany Community Support	\$25,000
Bluebird Foundation	\$30,000
Espod Geelong	\$6,200
Grovedale Toy Library	\$1,500
Lions Village Licola	\$7,000

## HEALTH

Bellarine Community Health	\$25,000
The Type 1 Foundation	\$12,000

## HERITAGE AND ARTS

Geelong Art Gallery	\$7,500
Music at the Basilica	\$2,500
The Trustee for Geelong Advertiser Music Scholarship Trust	\$2,500
Torquay Museum Without Walls	\$1,000

## RESEARCH AND DEVELOPMENT

Kids Plus Foundation \$30,000 (2nd year of a 3 year grant)	
Wombat's Wish	\$25,000

## YOUTH

Ardoch	\$10,000
Bancoora Surf Life Saving Club	\$2,500
Bellarine Training and Community Hub Cottage by the Sea \$15,000 (year 1) \$15,000 (year 2)	\$10,000
Geelong Youth Engagement	\$15,000
Kardinia Community Services	\$4,000
Ocean Mind \$30,000 (2nd year of a 2 year grant)	
Read the Play	\$8,000
Somebody's Daughter Theatre Company	\$20,000
Sports Challenge Australia (SCA)	\$8,000
The Scout Association Barwon District	\$7,500

## OTHER GRANTS

The Gordon Scholarships	\$10,000
Back To School Program	\$50,000
Adroit Insurance & Risk Capital Grant Geelong Youth Engagement	\$75,000
2021 P500 Grant Recipient Geelong Youth Engagement	\$68,000

# Grants Allocation - 2022/23



Anam Cara House Geelong



## AGED CARE

### **Anam Cara House Geelong** \$50,000

To contribute to the new specialised community hospice for Geelong region families diagnosed with a life-limiting illness, including the support of their families and carers.

### **Bellarine Community Support Register** \$12,500

To finalise the development of a new secure database that will hold all the personal, medical, property and emergency contact information of our current and future Registrants and assist our organisation to transition from a paper-based to a cloud-based system.



## COMMUNITY WELLBEING

### **Art of The Minds** \$15,000

To fund festival marketing and advertising for mental health and wellbeing events during National Mental Health week in October 2022, improving education to the community around raising awareness of mental illness.

### **Barwon Disability Resource Council** \$20,000

To support the establishment of a Leadership Peer Action Group for people with a disability, building their skills and experience in community leadership, strengthening their understanding of the importance and value of inclusion within the Committee for Geelong leadership programs.

### **Bellarine Living and Learning Centre** \$20,500

To fund employment of a Coordinator and Volunteer Project Manager to engage the community around food sustainability through horticultural and cooking workshops, fresh food boxes, community kitchen and visits to partner organisations.



Bellarine Living and Learning Centre

### **Bravehearts Foundation** \$5,000

To help deliver the Ditto's Keep Safe Adventure Education program for children aged 3-8 in schools and kindergartens across the Geelong region. Parent and teacher information sessions are offered to provide training and professional development to enable the education of children regarding their personal safety.

### **Cloverdale Community Centre** \$20,000

To increase the capacity of the trade training site, enabling more disengaged and disadvantaged community members to gain additional training, thereby increasing their opportunities to join the workforce.

### **Drysdale Family Support**

(SpringDale Community Garden) \$4,000

To purchase a chipper/shredder to produce organic garden compost and install raised garden beds in the Community Garden to improve accessibility for senior members.



# Grants Allocation - 2022/23

## **Encompass Community Services** \$13,000

To assist with the purchase of a vehicle to deliver home packs to individuals and families. Vehicle will also be utilised for the collection of donated items.

## **Feed Me Bellarine**

\$50,000 (year 1) \$50,000 (year 2)

To support an increase in meal capacity with the purchase of a larger oven, and employment of a part-time administration worker to answer calls for assistance and co-ordinate volunteer deliveries.

## **Geelong Food Relief Centre** \$30,000

To fund the purchase of food for the North Geelong Warehouse, to improve food security in the region.



## **Geelong Mums** \$15,000

To support the Volunteer Coordinator to engage and mobilise new and returning male volunteers to carry out repairs, refurbishing, assembling of objects and mechanical tasks on donated items for distribution to families.

## **Healthy Minds Geelong** \$10,500

To fund research on mental health services in the region to develop a mental health hub/online directory for the organisation's website.

## **Hope Bereavement Services**

\$45,000 (year 1) \$45,000 (year 2)

To fund employment of a Community Development and Engagement Coordinator for the Hope Community Pathways program, a proactive and community-responsive model of care to meet the needs of the bereaved and their carers.

## **Lazarus Community Centre**

\$33,000 (year 1) \$25,000 (year 2) \$20,000 (year 3)

To fund organisational operational costs to sustain critical support services for homeless and people of disadvantage in a safe and welcoming place.

## **Lifeline Geelong & South West Victoria** \$10,000

To support a Lifeline Trainer to deliver a Crisis Support course to volunteers, ensuring continued capability of responding 24/7 on the crisis line in the Geelong Centre.

## **Norlane Community Initiatives** \$30,000

To employ local community development practitioners to work alongside Norlane residents to co-create activities, projects and initiatives at two Neighbourhood Common sites.

## **Ocean Grove & District Men's Shed** \$3,600

To fund the upgrade of router equipment, enabling safer use of equipment and accurate computer detail cutting of wood and metal pieces.

## **OneCare Geelong** \$25,000

To support staffing operational costs for the continuation of Eat Share Thrive programs for disadvantaged, marginalised and socially isolated Geelong residents.

## **Riding for the Disabled Barwon** \$10,000

To fund the cost of hiring the facilities and horses, enabling young disabled people to participate in fortnightly riding sessions to improve their learning and social interaction.

## **Rosewall Neighbourhood Centre** \$5,000

To support participants with free lessons for the 'Make a Meal, Take a Meal' program, providing dignified food relief while focusing on building nutrition literacy and improving cooking capacity of disadvantaged parents.



# Grants Allocation - 2022/23

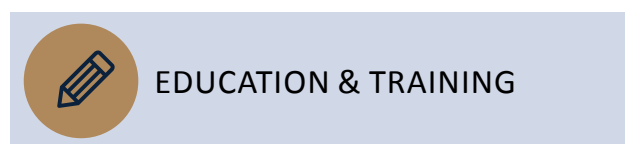
**Samaritan House Geelong** \$15,000  
To support the costs of operating the Accommodation Living Skills Program. The program provides life skills to men experiencing homelessness, assisting them to become independent including sourcing of long-term housing.

**Sirovilla** \$25,000  
To fund a housing project linking three levels of government, the community sector and private developers with the shared goal of creating more equitable housing options across the region.

**The Empowerment Challenge** \$23,000  
To fund Phase 2 of the 'Mobile Outreach' program, offering easily accessible, long-term support to vulnerable younger mums in the Geelong area, allowing them to connect, foster self-belief and improve mental health and well-being.



**The Power in You Project** \$40,000  
To support the 'New Directions' program, supporting people when exiting the prison system by assisting them to reintegrate safely and successfully back into the community.



**Barwon Adolescent Task Force** \$30,000  
To provide resources for students, parents/carers and schools for the transition to Year 7, in response to the complexities of COVID by developing skills and strategies to deal with anxiety and stress of living through a pandemic.

**CatholicCare Victoria** \$20,000 (2nd year of 2 year grant)  
To provide economic security and employment opportunities for refugee and asylum seeker youth and their mothers who reside in the northern suburbs of Geelong through participation in the Settle Well - Next Phase program.

**EdConnect** \$17,200  
To fund recruitment, screening, training and placement of 14 volunteers in schools to convert the 'Resiliency in Students' module to online and to continue the Mentor program, providing benefits to both students and volunteers.

**Geelong Region Local Learning & Employment Network (GRLEN)** \$15,000  
To support 'Project Upskill,' an on-the-job training model focusing on digital marketing to help raise awareness and engagement for structured workplace learning programs/resources, offering meaningful employment in the regional economy for young people from a range of cohorts.

**Northern Futures** \$40,000  
To fund a facilitator for the 'CALD Jobseekers' program offering participants an opportunity to gain experience and practice their skills in conversational and written communication and computer skills to produce a book documenting their stories of arriving in Australia and adjusting to their new culture.

**Skyline Education Foundation** \$20,000  
To employ Skyline alumni as tutors, offering weekly tutoring needs to 30 vulnerable VCE students participating in the Geelong Region program.

**The Song Room** \$35,000 (2nd year of a 2 year grant)  
To deliver the Transformational Learning Through Creativity program for vulnerable Whittington Primary School students by supporting their engagement in learning and improving their social emotional well-being, empower teachers in embedding the Arts into their teaching, school leadership and prioritise as part of the school experience.





# Grants Allocation - 2022/23

## Volunteering Geelong

\$17,500

To fund the 'Impacting a Pathway to Employment' Program (IPEP) preparing 10 young people for employment and offering a volunteering experience as part of their participation.



## ENVIRONMENT

### Anglesea Aireys Inlet Society for the Preservation of Flora & Fauna (ANGAIR)

\$10,000

To support Friends of Eastern Otways to develop a smartphone app used in conjunction with QR Codes to be placed on existing signs along walking tracks in the Great Otway National Park promoting exploration, appreciation and conservation of the natural environment.



## FAMILY

### Bethany Community Support

\$25,000

To contribute to ROAR, a specialised group program for vulnerable women in the community who are experiencing family violence by providing a safe place to share stories of change, strengthen one another and rebuild positive futures.

## Bluebird Foundation

\$30,000

To fund the North Children's Choir, for children in the 3214 postcode an opportunity to participate in a comprehensive high quality after-school music education program.

## Espod Geelong

\$6,200

To fund rewiring of the organisation's house to ensure safety for staff, volunteers, individuals and families.

## Grovedale Toy Library

\$1,500

To develop 'Story Stacks' that include a story book by an Australian author and matching toys, to enable children to enter the story through the accompanying activities to develop their language and literacy skills.

## Lions Village Licola

\$7,000

To provide funding for twenty-two vulnerable children identified through local family and refugee support agencies to enjoy the challenges of a life changing five-day Lions Village Licola summertime wilderness camp in January 2023.



## HEALTH

### Bellarine Community Health

\$25,000

To establish a full-time Speech Therapy Senior Clinical role within the Child Health team to increase early intervention service capacity for children aged 0-12 years.



Bellarine  
Community  
Health

# Grants Allocation - 2022/23

## The Type 1 Foundation

\$12,000

To support Camp Koala for diabetic teenagers providing them with respite from their normal routine and offering specialised facilitators and activities to educate and increase confidence managing their diabetes.



## HERITAGE & ARTS

### Geelong Art Gallery

\$7,500

To deliver outreach workshops to primary school aged students in the community, increasing their understanding of First Nations culture by designing and creation of two school murals, facilitation of workshops and online resources during Book Week.

### Music at the Basilica

\$2,500

To support artists performing at a Festival of Music with concerts, free organ recitals and a free cultural connection event in cooperation with an Indigenous group during October 2022.

### The Trustee for Geelong Advertiser

#### Music Scholarship Trust

\$2,500

To support the Regional Section of the Australian Youth Classical Music Competition for young classical musicians from the G21 footprint, increasing the opportunities available by offering them a public performance.

### Torquay Museum Without Walls

\$1,000

To purchase a superior printer to enhance exhibitions of the local Torquay history with quality images and posters, and the quarterly library display, benefiting locals and tourists to the area.



## RESEARCH & DEVELOPMENT

### Kids Plus Foundation

\$30,000 (2nd year of a 3 year grant)

To contribute to a Research Co-ordinator position to oversee the organisation's research agenda, enabling improved therapy service delivery by allied health providers resulting in daily, practical benefits to children and young people with neuro-physical disabilities.

### Wombat's Wish

\$25,000

To fund evidence based research to update activities and workshops in the camp program appropriate for different age groups enhancing the experience of children/young people and surviving parent throughout their grief journey.



## YOUTH

### Ardoch

\$10,000

To develop a Robotics program for children in years 5 & 6 to learn vital STEM (Science, Technology, Engineering and Math) skills and help foster their confidence and engagement in learning.

### Bancoora Surf Life Saving Club

\$2,500

To purchase new Nipper boards, benefiting younger members of the Club to develop skills in water safety and awareness.



Wombat's Wish



# Grants Allocation - 2022/23

## **Bellarine Training and Community Hub** \$10,000

To fund staffing costs for the 'Drop In' program, offering disengaged and disadvantaged young people across the Bellarine a weekly recreational program facilitated in a fun, safe and supportive environment.

## **Cottage by the Sea**

\$15,000 (year 1) \$15,000 (year 2)

To support the annual Mentor program camps for participants aged 13-18, offering disadvantaged and vulnerable children and their family's access to programs and resources to help meet their health & wellbeing needs.

## **Geelong Youth Engagement** \$15,000

To assist with operational costs for a move to more suitable premises with disability access, a larger space and in a more central location for delivery of youth services in one location.

## **Kardinia Community Services** \$4,000

To cover costs of a guest speaker and subsidise registration fees for the INCREASE leadership development conference, for young people aged 13-20.

## **Ocean Mind**

\$30,000 (2nd year of a 2 year grant)

To fund the Program Co-ordinator for an additional 2 years enabling the expansion of the service with additional places that will reduce the waitlist for young people to access mental health support through surfing.



## **Read the Play** \$8,000

To contribute to the relocation to a new office, set up of IT/email system and purchase computers for staff to support continued growth of the organisation.

## **Somebody's Daughter Theatre Company** \$20,000

To support the 'Nobody's Fool Theatre' program, a creative arts platform re-engaging disaffected young people aged 12-18 with education, community and hope for the future.



## **Sports Challenge Australia (SCA)** \$8,000

To deliver the SCA mentoring program face-to-face at Geelong East Primary School and outside the school gate for 'at risk' youth aged 6-12 years who have lost connectedness, building their mental and physical health through sport.

## **The Scout Association Barwon District** \$7,500

To purchase archery equipment, expanding the variety of outdoor activities available to Scouts in the Barwon District.

## OTHER GRANTS

## **The Gordon Scholarships** \$10,000

To fund annual scholarships to mature aged students studying at The Gordon. In 2022, five \$2,000 scholarships will be presented.

## **Back To School Program** \$50,000

Provides \$50 Target Vouchers to primary & secondary Schools. The Foundation in partnership with FRRR, the Glover Foundation and a number of other supporters allows the distribution of vouchers to 50 schools in the Geelong Region based on the scale of educational advantage.

The Foundation contributed \$50,000 which is leveraged through FRRR to receive 2,040 \$50 Target vouchers totaling \$102,000.

## **Adroit Insurance & Risk Capital Grant**

\$75,000 to Geelong Youth Engagement

To purchase a bus for transporting young people in the Geelong region to several locations for participation in the resilience program.

# Grants Impact - 2021/22



## Raising awareness of mental illness in the Surf Coast

**Art of the Mind** (pictured above) . . . . . **\$15,000**

The Art of the Minds aims to activate, educate and engage the Surf Coast and broader community to creatively manage their mental health and wellbeing. The organisation offers a resilience-focused, creative festival in October that coincides with National Mental Health Month to help reduce

the stigma around mental health and normalise experiences with mental illness across all ages and demographics.

The Geelong Community Foundation has provided Art of the Minds with a \$15,000 grant to support the mental health and wellbeing events they will run during National Mental Health Week, with the aim of improving education to the community around raising awareness of mental illness. “Even though it’s got an art or creative focus, we try and use those events to educate people,” shares Jules Haddock, Art of the Minds President and & genU Training Mental Health Educator.

Jules explains how the festival uses vulnerability in an empowering way. “It’s about giving each other permission to be vulnerable, and then learning from that vulnerability. You may be able to empower yourself to do activities that are creative to help you feel better, but you also need to know when you need professional help. We’re not a fluffy arts festival – we’re also sending a message around education and learning the importance of mental health.”

*“It’s about giving each other permission to be vulnerable, and then learning from that vulnerability.”*  
– Jules Haddock, Art of the Minds President



## A unique children’s personal safety education program

**Bravehearts** . . . . . **\$8,000**

Teaching young people how to increase their resilience and decrease their vulnerability is at the heart of Bravehearts’ Ditto’s Keep Safe Adventure personal safety program. The organisation offers child protection training and education

programs, specialist child sexual abuse counseling and support services. This grant has enabled the delivery of the program in schools and childcare centres across the region.

“It’s a personal safety program that’s unique because it talks to children in their language using music and age-appropriate information to help them recognise unsafe scenarios and to give them instructions on what they might need to do,” shares Bravehearts’ CEO Alison Geale.

“The magic of Ditto – is simple but important messaging told well through age-appropriate language and music and key insights, and all in an environment is really warm and inviting,” she continues.

Thanks to Bravehearts, personal safety has become ingrained into the culture of young people growing up in Geelong. Over the last decade, the Foundation has allowed Bravehearts, and by virtue personal safety, to become ingrained in the culture of growing up in Geelong.

*“Over the last decade, the Foundation has allowed Bravehearts, and by virtue personal safety, to become ingrained in the culture of growing up in Geelong.”*  
– Alison Geale, Bravehearts CEO

# Grants Impact - 2021/22



## Helping a child sleep safely during a time of family crisis

**Geelong Mums . . . . . \$28,000**

Combining the power of volunteers and community donations, Geelong Mums’ Safe Sleep Project has provided a safe sleep space for 1,677 babies and children in the past year. Geelong Mums is a voluntary network of people working together to collect and sort donations of baby and

preschool children’s clothing, toys and books, as well as essential nursery equipment. Geelong Mums is passionate about sharing the joy of motherhood by re-homing pre-loved equipment for babies and children to families in need.

The Geelong Community Foundation provided a \$28,000 grant for 2021/22 to support this program, which supplies vulnerable families with a cot or bed and linen so that a child can sleep safely during a time of crisis and/or financial hardship. “In providing this free service, we can reduce the risk of infant injury or mortality, parents in crisis are relieved of the financial burden of buying nursery equipment and ultimately a vulnerable baby or child is able to sleep in a safe cot, on a safe mattress, with safe, clean bedding,” shares Diana Khanom, Geelong Mums Philanthropy Manager.

“Families need help now more than ever. The gift of Safe Sleep items alleviates financial stress as families face an increase in the cost of living,” she adds.

*“Families need help now more than ever. The gift of Safe Sleep items alleviates financial stress as families face an increase in the cost of living.” – Diana Khanom, Geelong Mums Philanthropy Manager*



## Helping people to manage their own financial challenges with expert advice

**Volunteering Geelong . . . . . \$30,000**

People in the Geelong region experiencing financial difficulty can receive financial-management support to avoid reaching a crisis point, thanks to Volunteering Geelong’s pilot Financial Literacy Program.

The program has grown from a joint initiative between the Geelong Community Foundation and Give Where You Live, building financial capability for people in priority populations. The grant has enabled the organisation to offer the Financial Literacy Program. The volunteer-run free service assists people with building financial knowledge, setting financial goals, creating a budget, reviewing their income and expenses, improving their management of bills and exploring ways to save money, as well as offering financial mentoring and where to go for assistance. It is targeted at those experiencing financial distress who do not have access to financial counseling due to existing wait-lists.

According to Vaughan Lamb, a volunteer facilitator of the program, the most valuable feature of the Financial Literacy Program is “the ability to change the way people look at money”. “Part of this program aims to help people to look at money in a different way so they develop a more global picture of their finances,” he explains.

*“The reaction we’ve had from the people we’ve interviewed has been really uplifting – to see how they can change their circumstances.” – Vaughan Lamb, Volunteering Geelong Committee member*



# Scholarships

## Education Scholarships

The Foundation Scholarship Fund is a public fund developed for the charitable purpose of providing scholarships to promote education for secondary and tertiary students. There are opportunities in general education and for those interested in a career in the agriculture or horticulture sector.

Students should be aged between 15 and 25, live in the broader Geelong region and be an Australian resident. Students have the opportunity to apply annually and need to demonstrate:

- Personal achievements and community involvement
- Financial need
- Academic commitment

Scholarships in 2021/22 were valued from \$250 and up to \$1,000 to support education goals. A range of options are available including; support for an apprenticeship, a diploma/degree, costs to attend a workshop connected with your career aspirations, assistance with payment of fees, books, technological devices etc.

## Agriculture and Horticulture Scholarships

### > Tom & Irene Cleary Memorial Scholarship

The Tom & Irene Cleary Memorial Scholarship provides financial support to one young person aged between 16 to 25 years, who is seeking a career in any part of the Agricultural and Horticultural sector.

The scholarship is valued at \$1,000 and was awarded to:

- **Lucy Bullock** from Lara, studying a Bachelor of Agriculture at Charles Sturt University.

### > Rural Education and Retraining Scholarship

The objective of the Rural Education and Retraining Scholarship is to promote excellence in agriculture and related pursuits. The scholarship is funded by a local benefactor. The scholarship is valued at \$1,000 and was awarded to :

- **Blake McMahon** from Highton, studying at St Joseph's College and completing a Certificate II in Horticulture at Covenant College Geelong through VET.

## General Education Scholarships

### > Miles Family Scholarships

Recipients of the Miles Family Scholarships were:

- **Zarli Hassett** receiving \$500, studying at Clonard College and completing Certificate III in Animal Studies at Covenant College.
- **Zoe Carr** receiving \$500, studying at Bellarine Secondary College and completing Certificate II in Animal Studies at Covenant College.

### > Dorothy Jean Scholarship

Recipient of the Dorothy Jean \$1,000 Scholarship was:

- **Holly Moloney** from Geelong, studying a Bachelor of Nursing / Bachelor of Para medicine at Australian Catholic University in Ballarat



# Back to School Program

**\$102,000** FOR CHILDREN AND FAMILIES NEEDING A HAND

Students and families across the region who need help with the material costs of attending school have been provided with support through the Geelong Community Foundation's partnership with the Foundation for Rural & Regional Renewal (FRRR). The FRRR Back to School Program — in partnership with a range of Trusts and Foundations, including the Glover Family Trust — has been delivered in the region for many years. This year, The Foundation has delivered \$102,000 worth of \$50 Target vouchers to 33 primary schools and 13 secondary schools across the region.

"I never underestimate the power of a \$50 voucher," shares Gail Rodgers, CEO of the Geelong Community Foundation. "The feedback and stories we receive from the schools is sometimes heart breaking, but I know we are getting help to where it is needed most."

Consultation with Wellbeing Coordinators, Teachers and Principals ensures the vouchers get to where they are needed most. It is the knowledge of family and individual student circumstances that guides the equitable distribution. Secondary students living independently and grandparents identified as primary carers where financial challenges exist are often those who benefit most from the vouchers. The

vouchers are used to purchase essential school items such as uniforms, clothing for school-based activities, shoes, socks, school bags, toiletries and stationery.

For Newcomb Secondary College, the Back to School Program offers some of their students the chance to be more engaged and experience learning on the same level as their peers. "Through the relationship with the Foundation, our Wellbeing team offers vouchers to students in need that allow them access to resources to be ready to learn," explains Chiara Ercoli from Student Engagement and Wellbeing at Newcomb Secondary College. "This year, a student with ADHD who was unable to get to the paediatrician due to a long and extensive waitlist was provided with noise-cancelling headphones through the Back to School Program. This has allowed the student to fully engage in classroom learning, without the distraction of the noise of the class."

*The Foundation has delivered \$102,000 worth of \$50 Target vouchers to 33 primary schools and 13 secondary schools across the region.*





# Schools in Philanthropy Program

The Schools in Philanthropy (SIP) program was established by the Geelong Community Foundation in 2011 to help young people learn about philanthropy, social awareness and community leadership.

The program aims to inspire young people to use their enthusiasm, creativity and social awareness to begin a lifelong commitment to giving, through activities that have a positive impact on the communities in which they live and may work in. The program also aims to facilitate school and student involvement with the Foundation, and build awareness about how it invests in solutions that strengthen communities across the Geelong region.

The program targets Victorian Certificate of Applied Learning (VCAL) students and empowers teachers to deliver the program with a significant degree of autonomy. The program has strong synergies with VCAL in that it offers senior secondary students a practical and authentic learning experience, a vehicle to apply that learning and valuable opportunities to partner with the community.

The Foundation maintains contact with the schools to enhance that learning, and ensures the program is delivered consistently and in line with the Foundation's grant timelines and accountabilities.

The Foundation provides materials and program resources which teachers can use to guide students through the process. Teachers take full responsibility for the learning outcomes of their students.

The Foundation provides additional support in the form of a Mentor from the organisation whose role it is to provide advice and share knowledge about the Foundation,

philanthropy and the various community organisations encountered through the program.

The Foundation invites schools into the program through an expression of interest process. A VCAL class and its teacher are identified and matched with an experienced Mentor. The teacher and students are introduced to the program by the Foundation CEO and Mentor, and learn about the Foundation's grant process.

The Foundation identifies a number of community organisations that have applied for grants from the major grant round, and which are deemed suitable for the schools to work with and visit. The Foundation then distributes three grant applications to each school.

The students undertake research and analysis of the organisations and the project for which funding has been applied. The research includes a visit to each of the three community organisations for a presentation, and where possible, to see the organisations in operation.

The students need to carefully evaluate the requests in order to make informed decisions about how the available funds should be dispersed. The students make a formal presentation to the Foundation where they make grant recommendations, deliver their rationale and reflect on their learning. Finally, they attend the Foundation's annual Grant Reception in May and present the grant to each of the organisations they reviewed.

In 2022, the selected schools to participate in the program were Christian College, Oberon High School, Sacred Heart College and Surf Coast Secondary College. Grants awarded were as follows:



## **Espod . . . . . \$6,200**

To fund rewiring of the organisation's house to ensure safety for staff, volunteers, individuals and families.



## **Lions Village Licola . . . . . \$7,000**

To provide funding for 22 vulnerable children identified through local family and refugee support agencies to enjoy the 5 day Lions Village Licola summertime wilderness camp in January 2023.



## **Volunteering Geelong . . . . . \$17,500**

To fund the 'Impacting a Pathway to Employment' Program (IPEP) preparing 10 young people for employment and offering a volunteering experience as part of their participation.



# Schools in Philanthropy Program



## SACRED HEART COLLEGE GEELONG



Skyline Education Foundation

### GRLEN . . . . . \$15,000

(Geelong Region Local Learning & Employment Network)  
To support 'Project Upskill', an on-the-job training model focusing on digital marketing to help raise awareness and engagement for structured workplace learning programs, offering meaningful employment for young people.



### Healthy Minds Geelong . . . . . \$10,500

To fund research on mental health services in the region to develop a mental health hub/online directory for the organisation's website.



### Skyline Education Foundation Aus. . . \$20,000

To employ Skyline alumni as tutors, offering weekly tutoring needs to 30 vulnerable VCE students participating in the Geelong Region program.



## CHRISTIAN COLLEGE GEELONG



Ed Connect

### Ed Connect . . . . . \$17,200

To fund recruitment, screening, training and placement of 14 volunteers in schools and to convert the 'Resiliency in Students' module to online and to continue the Mentor program.



### Grovedale Toy Library . . . . . \$1,500

To develop 'Story Stacks' that include a story book by an Australian author and matching toys, to enable children to enter the story through the accompanying activities, developing language and literacy skills.



### Kardinia Community Services . . . . . \$4,000

To cover costs of a guest speaker and subsidise registration fees for the INCREASE leadership development conference, for people aged 13-20.



## SURF COAST SECONDARY COLLEGE



Art of the Minds

### Art of the Minds . . . . . \$15,000

To fund festival marketing and advertising for mental health and wellbeing events during National Mental Health week in October 2022. The festival is aimed at improving education for the community around awareness of mental illness.



### Ocean Grove Men's Shed . . . . . \$3,600

To fund the upgrade of router equipment, enabling safer use of equipment and accurate computer detail cutting of wood and metal pieces.



# Board of Directors



**Michael Betts**

**CHAIRPERSON**

BComm MBA, M.Tax Law  
GAICD

*Joined the Foundation Board in 2020*

Michael Betts is a Director and Consultant. He is a retired Chartered Accountant with over 37 years of experience in public practice, including 26 years as a Principal.

Michael maintains a consultancy role with several of his former accountancy clients. Michael has over 40 years of experience in not-for-profit organisations in the Barwon Region.

In early 2021, Michael retired as a Director and inaugural Chair of Northern Futures Ltd. He was formerly a Director and Chair of the Committee for Geelong Ltd, a Director of The Geelong College Ltd and Director and President of The Geelong College Foundation Ltd.



**Mark Osborne**

**DEPUTY CHAIRPERSON**

GAICD GradCert Man

*Joined the Foundation Board in 2018*

Mark is currently the Business Advisor and Brand Ambassador to Tuckers Funeral & Bereavement Service. He was previously the Victorian General Manager for InvoCare Australia and the CEO to the Cole Group of Companies, where he was an owner and Partner of Tuckers Funeral & Bereavement Service. Prior to this, Mark served with the Department of Defence where he held several senior positions serving for over 20 years.

Graduate of the Leaders for Geelong Program, Mark has held several Board positions and been actively involved in the Geelong community across many entities. He is a Graduate of the Australian Institute of Company Directors and currently Chairs the Finance Committee for the Barrabool Christian Foundation.



**Lachlan McColl**

**TREASURER**

B.Com (Melb), M. App Fin  
(Macq), CA, FFin, CA BV Specialist

*Joined the Foundation Board in 2013*

Lachie is a Director of Value ADE, providing business valuation services in the Geelong area. Prior to starting Value ADE in 2017, he was a Director of Corporate Finance at Crowe Horwath.

Lachie is a Chartered Accountant and Business Valuation Specialist.

He lives in Geelong with his family and is a graduate of the Leaders for Geelong program. Lachie was previously a Director of Bethany Community Support and Bethany Kindergarten Services.



**Richard Anderson**

**DIRECTOR**

B. Com. LLB

*Joined the Foundation Board in 2014*

Richard is a Principal and former Chairman of Harwood Andrews Lawyers. As well as holding degrees in law and commerce, Richard is an accredited specialist in commercial litigation, the area in which he practises.

Over a number of years, Richard has been involved in various non-profit organisations including the role of Treasurer at the Geelong Community Legal Service and Villamanta Legal Service. He has been a Board member of Sirovilla, the Brotherhood of St Laurence and Chairman of St Laurence Community Services. Richard was previously a Trustee of the Australian Youth Classical Music Competition and a council member of Marcus Oldham College.



# Board of Directors



**Wendy Brooks**

**DIRECTOR**

BMus, LLB (Hons), Grad Dip LP,  
AMICDA, MFIA

*Joined the Foundation Board in 2020*

Wendy is passionate about social justice, equity and human rights. Her career has spanned law, music and strategic fundraising. Wendy's other leadership positions include: Co-Chair, Human Rights Watch (HRW) Australia; Board Chair of InLife Independent Living Ltd; Board Chair of HOST International; Board Director of Summer Housing Ltd; and Management Committee member of Friends of Eastern Otways. Wendy serves on the HRW International Disability Rights Advisory Council and the Scope University of Melbourne Research Advisory Council and is an active member of ANGAIR.

Through Wendy Brooks & Partners, Wendy provides strategic fundraising and capacity building services to the community sector. Wendy grew up in Geelong and returned with her life partner Rod and young family for 10 years in the 1990s.



**Allana Goldsworthy**

**DIRECTOR**

B.A LLB (Monash Uni)

*Joined the Foundation Board  
in 2018*

Allana practises in Family Law and provides training to family lawyers through the Leo Cussen Institute. Allana is a Nationally Accredited Family Law mediator. Allana has had extensive involvement with local community organisations, including Deakin University Animal Experimentation Committee, Barwon Child Rights & Maltreatment Task Force, Zonta International, St Laurence Community Services, Gordon Board, Geelong College Foundation, Geelong Business Club, RACV Club and Geelong Club.

She served as a Regional Councillor with the City of Geelong from 1998 – 2001. She is a member of the Law Council of Australia, Victorian Bar Association, Victorian Women's Barrister's Association, Vicbar Family Law Barrister's Association, and Australian Institute of Family Law Mediators and Arbitrators.



**Bridgette Kelly**

**DIRECTOR**

LLB BCom GDLP

*Joined the Foundation Board in 2019*

Bridgette is a Principal Lawyer at Coulter Legal. She is a Law Institute of Victoria Accredited Specialist in Family law. Bridgette was the Chair of the Geelong Community Foundation's Philanthropy 500 Committee from its inception in 2016 to 2019 and she was a founding Committee member of the Geelong Young Professionals Network.

She is currently a member of The Geelong College Council. Bridgette is also an Alumni of the Leaders for Geelong program.

Bridgette lives in Geelong with her family and her interests outside of work include spending time with her family, baking, playing netball and travel.



**Val Lawrence**

**DIRECTOR**

OAM DSJ JP

*Joined the Foundation Board in 1999*

Val is Chairperson of the Point Lonsdale/Queenscliff Red Cross Unit and local Convenor for the Area Annual Red Cross Calling Appeal.

Val was a Councillor of the Borough of Queenscliffe from 1999 to 2008 and Mayor from 2001 to 2004 and awarded the Centenary Medal in 2001 for Community Service.

Val has been a Board Member of the Grace McKellar Centre, Board Member Queenscliffe Maritime Museum, Vice President of the Barwon Heads Golf Club, Board Member of the Geelong Otway Tourism and an original Member of the G21 Board. She is also an Honorary JP.

# Board of Directors



**David Lindsay**  
**DIRECTOR**  
LLB

*Joined the Foundation Board in 2014*

David joined Wighton and McDonald Lawyers in 1984 and became a Partner in 1986. He retired from Wightons Lawyers in 2013, following a successful career where he became an accredited specialist in the areas of Wills and Estates along with Business Law.

During his career, David has been very involved with the Law Institute in lawyer education in the areas of Wills and Estates and Business law. Until recently, he was the Chairman of Eastcoast Vacations, which is a Timeshare Trust. David is also Vice President of Kondanani Zambia Inc. which supports some schools in Zambia.



**Andrew Locke**  
**DIRECTOR**  
GAICD, Adv. Dip. FS (Brok), NIBA (QPIB)

*Joined the Foundation Board in 2017*

Andrew is a founding Director of Maven Insurance + Advisory, an insurance broking and financial services business that commenced on the Surf Coast in 2019. For nearly 15 years prior to this, Andrew was Managing Director of Adroit Insurance & Risk, leading the business to fourfold growth, while gaining the reputation as a leading "Community" partner, of which Andrew is most proud of.

Andrew is a Foundation donor, a member of the Strategic Steering Group of the Torquay Football and Cricket Club, previous Chair of The Geelong College Parents Support Group for Cricket, past Board member of the St Therese Primary School in Torquay and served as a judge for the Geelong Chamber of Commerce Business Excellence Awards.



**Hayden Torney**  
**DIRECTOR**  
CFP, B.Econ and Dip. Ed. Monash

*Joined the Foundation Board in 2014*

Hayden moved to the Surf Coast in 1973 and taught Legal Studies and Economics in Geelong for the next 17 years. In 1989, Hayden left the teaching profession and, with his wife Sally, started Muirfield Financial Services. Over the past 30 years, they have built Muirfield into a very successful Financial Planning business catering to the retirement planning needs of their clients aged 55+.

In 2018, Hayden joined the ranks of retirees, leaving the business in the capable hands of his sons and fellow staff members. Hayden is a Life Member of the Jan Juc Surf Lifesaving Club where he has served as President and Club Captain. He is passionate about giving back to the community that has served his family well for nearly 50 years and, by extension, strengthening the region in which his children and their children will develop as his philanthropic priority.



**Carly Luke**  
**DIRECTOR**

*Joined the Foundation Board in 2018*

Carly is the owner of Geelong-based branding and communications agency Circus Media. She holds a Bachelor of Arts (Public Relations) majoring in Media & Communications from Deakin University, and is currently completing her Master of Communication thesis, looking at the impact of local media on recidivism rates.

She is passionate about human rights and humanitarian issues, especially gender-based violence. Carly is well-known in the Geelong community having developed strong relationships with the local media, industry leaders and the wider community through various business, leadership and community initiatives including pro-bono work.

# Board of Directors



**Barton van Laar**  
**DIRECTOR**

*Joined the Foundation Board in 2010-2013, 2020-*

Barton has worked in marketing and communications in Geelong since 1972 and is now retired. He is a strong advocate for cycling safety, environment and social justice.

After working as a Marketing Manager, he started Barton Marketing and GSDM. Over that period his Company was presented with various State & National awards in Advertising, Public Relations and Marketing. He is currently Chairman of Geneseq Biosciences Pty Ltd.

He has fulfilled many community roles, including Geelong Food Relief Centre – Director; Bike Safe – President and Founder; Bellarine Basketball Association – President; Geelong Arts Precinct Leadership Group – Community Representative; and G21 Transport Pillar – committee member. In 1993 he was awarded the United Way (now GWYL) inaugural President's Award.



**Cameron White**  
**DIRECTOR**

*Joined the Foundation Board in 2019*

Cameron is a founding Partner at Advisory Partners after commencing his career with Day Neilson.

Cameron has extensive practical experience across the financial services spectrum with a particular passion for driving whole of family outcomes.

Cameron is a member of the Financial Planning Association (FPA), the Highton Rotary Club and was a Director at DoCare Geelong for 4 years.

# Staff



**Gail Rodgers**  
**CHIEF EXECUTIVE OFFICER**  
FICDA, Dip. Bus. Gov. (Chisholm)

*Joined the Foundation in 2016*

Gail's distinguished career includes roles in the community and corporate sectors, and a passion for the Geelong region. Since 2007, Gail was the Manager at Volunteering Geelong and has great knowledge and connections in the Geelong community. Gail is formerly the Corporate Citizenship Manager at Ford Australia and Executive Director at United Way Geelong (now Give Where You Live).



**Tony McManus**  
**DEVELOPMENT MANAGER**  
B. Bus. CCEO

*Joined the Foundation in 2018*

Tony's background includes the role of the first Independent Chairman of a Headspace local consortium. He is a National Ambassador for Beyond Blue, a Community Ambassador for RU OK? and a sought-after Speaker in corporate and community forums about coping with mental health issues.



**Ally McManus**  
**COMMUNICATIONS OFFICER**  
B.A. (Journalism)

*Joined the Foundation in 2022.*

Ally studied at Kardinia International College in Geelong, before commencing a Bachelor of Journalism at RMIT. She moved to Sydney to become a full-time writer, editor and sub editor in lifestyle magazine at Bauer Media (now Are Media) and Universal Media. In 2019, Ally returned to Victoria to work as a full-time freelance lifestyle writer and editor for a number of magazines and books.



**Gennette Jewell**  
**ADMINISTRATION ASSISTANT**

*Joined the Foundation in 2018*

Gennette commenced at the Foundation as a Volunteer in 2017 before transitioning to the role of Administration Assistant in 2018, following a sea change to the Geelong Region from Northeast Victoria. Previously Gennette worked within the health sector in various roles, including 15 years as an Executive Assistant.



# Financials

## INCOME AND EXPENDITURE STATEMENT

<b>GIFT FUND</b>	<b>2022</b>	<b>2021</b>
	<b>\$</b>	<b>\$</b>
<b>INCOME</b>		
Donations received	1,271,177	833,076
Income from investments	875,977	477,000
	<u>2,147,154</u>	<u>1,310,076</u>
<b>EXPENDITURE</b>		
Management fee	256,691	239,176
Bank & investment expenses	12	7
	<u>256,703</u>	<u>239,183</u>
<b>NET INCOME</b>	1,890,451	1,070,893
Grants paid and provided	(819,000)	(833,800)
Net increase/(Decrease) in value of investments	(1,911,895)	2,170,143
<b>SURPLUS / (DEFICIT) for year</b>	<u>(840,444)</u>	<u>2,407,236</u>
Balance of Gift Fund at beginning of year	<u>18,321,660</u>	<u>15,914,424</u>
<b>BALANCE OF GIFT FUND at end of year</b>	<u>17,481,217</u>	<u>18,321,660</u>

## ADMINISTRATION FUND

<b>INCOME</b>		
Management fees	432,151	402,243
Interest	2	6
Other income	-	55,700
	<u>432,153</u>	<u>457,949</u>
<b>EXPENDITURE</b>		
Administration expenses	384,938	366,765
<b>SURPLUS / (DEFICIT) for year</b>	<u>47,215</u>	<u>91,184</u>
Balance at beginning of year	<u>171,210</u>	<u>80,026</u>
<b>BALANCE OF ADMINISTRATION FUND at end of year</b>	<u>218,425</u>	<u>171,210</u>

### NOTES

These statements are abridged from the full set of financial statements, which have been audited by Mr Stephen Kirtley of Davidsons. A copy of the audited financial statements and the audit report are available on request to the CEO or from [www.geelongfoundation.org](http://www.geelongfoundation.org)

The Geelong Community Open Fund is a separate Trust. Its income is exempt from income tax, but gifts made to this Fund are not tax deductible.

## BALANCE SHEET

<b>FUNDS</b>	<b>2022</b>	<b>2021</b>
	<b>\$</b>	<b>\$</b>
Settled sum	980	980
Total Sub-funds/reserves	<u>17,699,642</u>	<u>18,492,870</u>
	<u>17,700,622</u>	<u>18,493,850</u>
Represented by:		
<b>ASSETS</b>		
<b>CURRENT ASSETS</b>		
Cash at bank	945,195	592,062
Short term deposits		
Debtors	316,927	203,069
Investments, at net realisable value	<u>1,481,471</u>	<u>308,739</u>
	<u>2,743,593</u>	<u>1,103,870</u>
<b>NON-CURRENT ASSETS</b>		
Investments, at net realisable value	15,035,977	17,463,215
Debtors	7,663	7,077
	<u>15,043,640</u>	<u>17,470,292</u>
<b>TOTAL ASSETS</b>	<u>17,787,233</u>	<u>18,574,162</u>
<b>LIABILITIES</b>		
<b>CURRENT LIABILITIES</b>		
Creditors	27,810	25,463
Provisions	33,420	24,963
Other current liabilities	<u>21,195</u>	<u>19,820</u>
	<u>82,425</u>	<u>70,246</u>
<b>NON-CURRENT LIABILITIES</b>		
Provisions	4,186	10,066
	<u>4,186</u>	<u>10,066</u>
<b>TOTAL LIABILITIES</b>	<u>86,611</u>	<u>80,312</u>
<b>NET ASSETS</b>	<u>17,700,622</u>	<u>18,493,850</u>

Grants can be made for charitable purposes without being restricted to tax deductible gift recipients, as is the case with the Gift Fund.

The Geelong Community Foundation Scholarship Fund is also a separate Trust where a public fund is developed for the charitable purpose of providing scholarships, bursaries and prizes to promote education in pre-school, primary, secondary and tertiary courses.

# Financials

## INCOME AND EXPENDITURE STATEMENT

<b>OPEN FUND</b>	<b>2022</b>	<b>2021</b>
	<b>\$</b>	<b>\$</b>
<b>INCOME</b>		
Donations received	472,803	290,780
Income from investments	607,325	317,323
	<u>1,080,128</u>	<u>608,103</u>
<b>EXPENDITURE</b>		
Management fee	174,984	162,869
	<u>174,984</u>	<u>162,869</u>
<b>NET INCOME</b>	905,144	445,234
Grants paid and provided	(425,000)	(198,000)
Net increase/(Decrease) in value of investments	<u>(1,246,348)</u>	<u>1,470,550</u>
<b>SURPLUS / (DEFICIT) for year</b>	<u>(766,204)</u>	<u>1,717,784</u>
Balance of Open Fund at beginning of year	<u>12,180,550</u>	<u>10,462,766</u>
<b>BALANCE OF OPEN FUND at end of year</b>	<u>11,414,346</u>	<u>12,180,550</u>

## BALANCE SHEET

<b>FUNDS</b>	<b>2021</b>	<b>2020</b>
	<b>\$</b>	<b>\$</b>
Settled sum	100	100
Total Sub-funds/reserves	<u>11,414,346</u>	<u>12,180,550</u>
	<u>11,414,446</u>	<u>12,180,650</u>
Represented by:		
<b>ASSETS</b>		
<b>CURRENT ASSETS</b>		
Cash at bank	91,838	4,950
Debtors	202,963	99,676
Investments, at net realisable value	<u>1,079,339</u>	<u>309,308</u>
	<u>1,374,140</u>	<u>413,934</u>
<b>NON-CURRENT ASSETS</b>		
Investments, at net realisable value	10,034,124	11,760,983
Debtors	<u>6,182</u>	<u>5,733</u>
	<u>10,040,306</u>	<u>11,766,716</u>
<b>TOTAL ASSETS</b>	<u>11,414,446</u>	<u>12,180,650</u>
<b>LIABILITIES</b>		
<b>CURRENT LIABILITIES</b>		
Trade and other liabilities	-	-
<b>TOTAL LIABILITIES</b>	<u>-</u>	<u>-</u>
<b>NET ASSETS</b>	<u>11,414,446</u>	<u>12,180,650</u>

## INCOME AND EXPENDITURE STATEMENT

<b>SCHOLARSHIP FUND</b>	<b>2022</b>	<b>2021</b>
	<b>\$</b>	<b>\$</b>
<b>INCOME</b>		
Donations received	29,150	10,500
Income from investments	<u>10,739</u>	<u>9,897</u>
<b>NET INCOME</b>	<u>39,889</u>	<u>20,397</u>
<b>EXPENDITURE</b>		
Management fee	477	198
	<u>477</u>	<u>198</u>
<b>NET INCOME</b>	39,412	20,199
Grants paid and provided	(27,000)	(11,300)
Net increase/(Decrease) in value of investments	<u>(28,172)</u>	<u>37,235</u>
<b>SURPLUS / (DEFICIT) for year</b>	<u>(15,760)</u>	<u>46,134</u>
Balance of Scholarship Fund at beginning of year	<u>291,838</u>	<u>245,704</u>
<b>BALANCE OF SCHOLARSHIP FUND at end of year</b>	<u>276,078</u>	<u>291,838</u>

## BALANCE SHEET

<b>FUNDS</b>	<b>2021</b>	<b>2020</b>
	<b>\$</b>	<b>\$</b>
Settled sum	100	100
Total Sub-funds/reserves	<u>276,078</u>	<u>291,838</u>
	<u>276,178</u>	<u>291,938</u>
Represented by:		
<b>CURRENT ASSETS</b>		
Cash at bank	28,472	1,838
Debtors	4,215	11,461
Investments, at net realisable value	<u>18,433</u>	<u>25,409</u>
	<u>51,120</u>	<u>38,708</u>
<b>NON-CURRENT ASSETS</b>		
Investments, at net realisable value	<u>225,058</u>	<u>253,230</u>
<b>TOTAL ASSETS</b>	<u>276,178</u>	<u>291,938</u>
<b>LIABILITIES</b>		
<b>CURRENT LIABILITIES</b>	-	-
<b>TOTAL LIABILITIES</b>	<u>-</u>	<u>-</u>
<b>NET ASSETS</b>	<u>276,178</u>	<u>291,938</u>

# Foundation Committees

## DONOR COMMITTEE

Responsibility: *To seek donations and bequests.*

**Members:** Andrew Locke (*Convenor*) Wendy Brooks  
Allana Goldsworthy Hayden Torney  
Barton van Laar  
**Co-opted:** Andrew Lawson Deb Anderson  
**Ex-Officio:** Michael Betts  
**Staff:** Tony McManus Gail Rodgers  
Gennette Jewell (*Admin*)

## FINANCE, RISK & AUDIT COMMITTEE

Responsibility: *To have oversight of the organisation's finances, and liaise with the CEO, bookkeeper and auditor in preparing the annual accounts.*

**Members:** Lachlan McColl (*Convenor*) Richard Anderson  
Val Lawrence Mark Osborne  
Cameron White  
**Ex-officio:** Michael Betts  
**Staff:** Gail Rodgers (*Admin*)

## GOVERNANCE, PLANNING & NOMINATING COMMITTEE

Responsibility: *To advise the Board on the development of the Foundation, its role in the community and focus on governance matters. To advise the Board on suitable people to be invited as Board Members to fill vacancies.*

**Members:** Richard Anderson (*Convenor*)  
Val Lawrence David Lindsay  
Mark Osborne Hayden Torney  
**Ex-officio:** Michael Betts  
**Staff:** Gail Rodgers (*Admin*)

## GRANTS COMMITTEE

Responsibility: *To recommend to the Board annual grant program activity and grant making strategy*

**Members:** Bridgette Kelly (*Convenor*) Wendy Brooks  
Val Lawrence David Lindsay  
Mark Osborne  
**Co-opted:** Michele Van Liessum Peter Johnston  
**Ex-officio:** Michael Betts  
**Staff:** Gail Rodgers  
Gennette Jewell (*Admin*)

## INVESTMENT COMMITTEE

Responsibility: *To have oversight and advise the Board regarding the investment of funds.*

**Members:** Cameron White (*Convenor*) Hayden Torney  
**Co-opted:** Christian Ryan Jon Black  
**Ex-officio:** Michael Betts  
**Staff:** Gail Rodgers (*Admin*)  
**In attendance:**  
Adam Blennerhassett/Michael Browne – JB Were

## MARKETING & PUBLIC RELATIONS COMMITTEE

Responsibility: *To ensure the Foundation has a visible and favourable image in the community and to develop and implement the marketing strategy.*

**Members:** Barton van Laar (*Convenor*) Andrew Locke  
Carly Post  
**Co-opted:** Cormac Hanrahan Emma Tyler  
**Ex-officio:** Michael Betts  
**Staff:** Gail Rodgers (*Admin*) Tony McManus  
Ally McManus

## P500 SUB COMMITTEE

Responsibility: *To advise the Board on the development and implementation of this collective giving program and its annual campaign.*

**Board Members:** Mark Osborne  
Bridgette Kelly  
**Chairperson:** Cormac Hanrahan  
**Vice Chairperson:** Matt Torney  
**Committee:** Hayden Baker  
Ben Broadhead  
Catherine Brooks  
Geoff Case  
Thom Davey  
Blanche Denmead  
Amy Gillett  
Lisa Hein  
Simon Loader  
Olivia Mackie-Coop  
Charlie MacKinnon  
**Staff:** Gail Rodgers  
Tony McManus  
Gennette Jewell (*Admin*)



# Our sponsors

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Katie Terpstra – Bookkeeping

Miranda Luby – Public Relations

Worldmark Corporate Consulting



## DISCOUNTED SUPPORT

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## SIGNAGE SUPPORT

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Trevor Homes Group

Winter & Taylor Isuzu



# Smarter giving



# Information

## *BROCHURES AVAILABLE:*

Both in print or in E-version



## *GRANT RECIPIENT SIGNAGE:*



## *COMPANY NAMED FUND SIGNS:*



## *SPONSORED BILLBOARDS:*

If you have the space, we would like to talk to you about helping us create further awareness of our Community Foundation.



*For further information, please contact:*

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# Geelong Community Foundation

Giving. Forever.