



Geelong Community Foundation

ANNUAL REPORT

2015-2016



Geelong
Community
Foundation

Your gift working forever



Your gift working forever

In 2016 we delivered grants to the value of **\$740,000**

Our grants impacted on areas in the community



Aged Care



Arts



Community Wellbeing



Education



Family



Health



Training & Research



Youth

Fund Value at 30 June 2016

\$19.6m

113

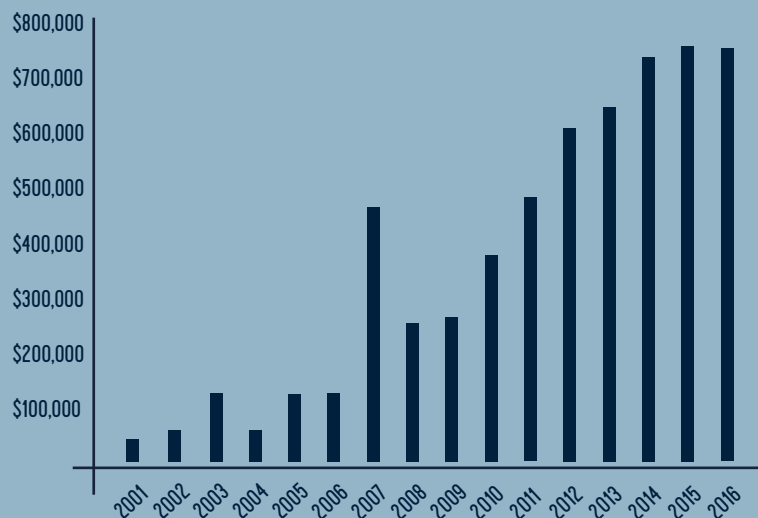
Donor Named Funds

We focus on local people



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

Since 2001 the total grants paid to community groups is over \$5.9M



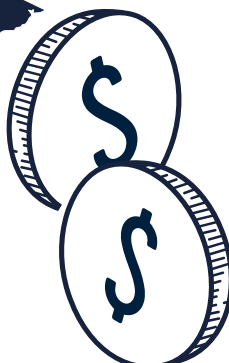
2012
\$12.1m

2008
\$8.9m

2004
\$3.3m
2001
\$2m

Low Costs

Administration costs are only 1% pa of the Fund Value



Geelong Community Foundation

In the 16 years since the Geelong Community Foundation was established in the year 2000, it has been making a difference by facilitating giving and investing in people and solutions to strengthen communities across the Geelong region.

The Foundation believes in the power of philanthropy to deliver long term, sustainable change. We empower individuals, families and organisations who want to make a difference, giving them a vehicle to develop and build a 'Named Fund' and a legacy for the future.

This is what makes us different!

Your donation is wisely invested and retained, in perpetuity, through a 'Donor Named Fund'. The income generated from your fund is used to meet the needs of our community through an annual grants program.

The Foundation supports a broad range of impact areas;

- Aged Care
- Community Well Being
- Education
- Family
- Health
- Heritage and the Arts
- Training and Research
- Youth

Contents

| | |
|--|----|
| Chairman's Report | 4 |
| Chief Executive Officer's Report | 5 |
| Community Grants | 6 |
| Supporting Education | 9 |
| Grant Spotlight | 10 |
| Your Gift Working Forever | 11 |
| Our Named Funds | 13 |
| Donor Stories | 14 |
| Board of Directors | 21 |
| Staff & Board Committees | 25 |
| Financial Statements | 26 |
| Our Corporate Supporters | 30 |

Chairman's Report



Welcome to my first Annual Report as Chairman of the Geelong Community Foundation. This year has seen a number of changes at the Foundation.

I was privileged to have been elected Chairman and follow in the footsteps of Dr Geoff Neilson, Barry Fagg and Val Lawrence. On behalf of the Board I would like to express my sincere appreciation for all the work that Val has done during her six years as Chair of the Foundation. I would also like to thank Val for her advice and encouragement to me when taking over the role as Chairman.

Gail Rodgers was appointed Chief Executive Officer in February. We are delighted to have Gail lead the team. Gail has a wealth of experience in both the commercial world and the community sector, having previously worked at United Way Geelong, Ford Motor Company and more recently at Volunteering Geelong. Gail has settled in well to the role and the Board looks forward to working with Gail in supporting and developing new initiatives for the long term benefit of the Geelong Community.

Andrew Lawson our initial Executive Officer, retired during the year after 17 years of service. Andrew has been the "linchpin" of the Foundation. Involved from the early days of incorporation, he worked closely with the inaugural Board in setting up all the regulatory requirements of a Community Foundation. He has overseen the administration and fund raising from day one, and has guided the Foundation to the position it holds today. Since the year 2000 we have secured almost \$20 million in capital, and have made grants of almost \$6 million. The Foundation holds an enviable position in the Community Foundation movement in Australia. To Andrew and Alison, his wife, thank you, we wish you a very happy retirement.

Adroit Insurance Group has been very generous in providing office space for our two part-time staff on a pro bono basis, to Andrew Locke and his Board, we thank you for this very kind gesture.

Thank you to all our Donors who have supported the Foundation again this year. New Named Funds have been established and some of our past Donors have converted their general contributions to a Named Fund or added to their existing Named Fund. This allows the Foundation to continue to build assets and make sure that income from your gift embodies the concept of the Geelong Community Foundation "Your Gift Working Forever".

This financial year has proved challenging with a volatile share market. However, our Investment Committee has continued to manage the portfolio with a prudent mix of

growth and income securities. As Val Lawrence mentioned last year, whilst we aim to ensure that capital values grow, we also expect that under our investment policy, there will be declines at certain periods in the investment cycle. We also need to generate income on the Foundation's capital to maintain and grow our grants program which is the prime reason for the Foundation's existence. As at the 30th of June 2016 our fund's assets were valued at \$19.6 million, Gift Fund \$11.3 million, Open Fund \$8.1 million and Scholarship Fund \$0.2million.

At the Grants Reception this year we announced 42 new grants totaling \$740,000. In addition to this figure was another \$55,000 provided by partnering with other Trusts.

To all our Board Members, thank you very much for your contribution to the work of the Foundation and your support and advice during the year. Special thanks go to Kate Betts, Deputy Chair and Convenor of the Marketing Committee and to the Convenors of our others Committees; Dianne Ritchie (Grants), Brian Quarrell (Investment) Lachlan McColl (Finance, Risk and Audit) and Richard Anderson (Governance and Planning). During the year Mark Osborne retired from the Board due to business commitments. On behalf of the Board I would like to thank Mark for his valuable contribution and wish him well for his future.

On behalf of the Board I thank Gail Rodgers and Sally Friend for their commitment to the mission of the Foundation. It has been an exceptionally busy five months since Gail has taken up her new position, moving to a new office and introducing new systems.

The Board is currently working on our strategic planning objectives for the next three years. The stock market will continue to play an important role in our ability to maintain our Grants Program. Our Investment Committee will continue to review the investment and management of our assets. Our involvement in Schools in Philanthropy, the Back to School Program, and the Adroit Golf Day will be part of our calendar of events. The Scholarships and Bursaries program will be promoted as another avenue for Donors to support our Community. Our Bequest program continues to play an important role in building the assets of the Foundation.

I would like to thank all our Donors and Volunteers for their support during the year. Your support allows us to build our assets and increase our ability to make additional grants to the Geelong Community.

Should you or anybody you know be interested in becoming a Donor, please contact Gail, Sally or myself and we would be delighted to discuss supporting the work of the Foundation.

John A Miles CPA
Chairman



Chief Executive Officer's Report

It is a pleasure to present my first report as CEO of the Geelong Community Foundation after commencing in the role in February.

The highlight of the past few months has been engaging with some incredibly passionate people who are committed to making a difference in our great community through the Foundation. No one more focused on this objective is Andrew Lawson who I have had the honour to succeed. Andrew has been extremely generous with his time to support my integration and introduce me to his incredible network of Foundation friends and supporters.

It has also been a pleasure working with many passionate people from community organisations over the past few months as we have implemented the 2016 Grant Program. The diversity of programs that have been funded is exciting for the community and its strength. You'll find all the details on pages 6, 7 and 8.

The Foundation has grown to 113 Named Funds with 9 new funds added in 2016 and I thank and acknowledge those individuals and organisations that have identified the Foundation as their partner in philanthropy. The funds, created in our Donor's name, become a permanent legacy that will be celebrated for generations to come. Details of the new funds and donations can be found on page 11.

Other activity and developments achieved over the past few months include;

- Update of our logo, development of our new website and the availability of online donations
- Development of our new bequest brochure
- Implementation of new grant agreement and acquittal documentation
- Another successful School in Philanthropy and the Back to School Program with more detail on page 9

Thank You!

There are a number of individuals and organisations that I wish to recognise for their in kind support, support that means our administration expenses can be kept to an absolute minimum.

Adroit Insurance Group provides office space for the Foundation staff and support of our IT, communications and administration and **Goodway Print Group** has supported

the Foundation for many years with discounted printing and sponsors this year's annual report.

Katie Terpstra is the Foundation's Bookkeeper and provides her professional services at a heavily discounted rate. Katie is passionate about the work of the Foundation and also volunteers her time at events. **Crowe Horwath and Davidsons** also provide discounts to the Foundation for their services in accounting and auditing. Crowe Horwath has also provided office space during the year for Sally, meeting space for Board and Committee meetings and administration support. **Fagg's Mitre 10** has also provided space for Committee meetings and product donations for fundraising events.

Cormac Hanrahan has provided photographic services for the Foundation for a number of years including the photo shoot of the **Dowling family** featured in our annual report and new bequest brochure. We thank Michael and his grandchildren for providing their modelling services; A fantastic visual representation of the future of our community.

We have been delighted to connect with **GOOP Digital** this year, who has provided discounted rates for our new website, its hosting and ongoing support for our logo refresh and graphic design.

I would also like to acknowledge **Dean Bateup** and **Jules Willoughby** for photographic support, **Peter Tanner** for employment services, **Alice Macdougall** of **Herbert Smith Freehills** and **Harwood Andrews** for legal advice and **The Geelong Advertiser Group** for advertising support.

Thanks to **Jenny Giblin** also who has also been a long term Volunteer of the Foundation, supporting Andrew and now myself with administrative assistance.

Our Development Manager, **Sally Friend** has also made a significant commitment and contribution to the Foundation and I especially thank her for her support as I have transitioned into my role.

Finally, I would like to acknowledge **John Miles**, the Chairman and all members of the Board who have supported me over the past few months. Their commitment, as Volunteers, to the objectives of our organisation is inspiring and I thank them for the time they have given.

Gail R Rodgers
Chief Executive Officer

2016 Community Grants

This year \$740,000 has been provided to 42 community organisations to fund a diverse range of initiatives across our eight impact areas of Aged Care, Community Wellbeing, Education, Family, Health, Heritage & Arts, Training & Research and Youth. In addition, the Foundation also provided \$10,000 to The Gordon Scholarship Program and \$45,000 to the Back to School Program, which is detailed on page 9. A summary of the organisation projects and programs funded follows;

AGED CARE SUPPORT

Cherished Pets Foundation \$15,000

To support volunteers to offer top level care for the pets of elderly and disabled pet owners.

Multicultural Aged Care Services \$28,000

To develop 'Mindful Moves', a program improving the physical, mental and social wellbeing of the diverse residents.

COMMUNITY WELLBEING

Anglesea & District Community House \$15,000

To run the Anglesea Resale Shed that recycles goods, reduces landfill and provides an ongoing source of income for local community groups in the Surf Coast Shire.

Citizens Radio Emergency Service Teams \$2,000

To purchase nine new radios, providing the most up to date equipment available to assist the community with general support and urgent calls for help.

Drysdale Family Support \$6,500

To develop an access road and garden pathways, garden edging and a covered community area for the Springdale Community Garden.

Foundation 61 \$27,000

To provide the opportunity for clients with drug and alcohol addiction to complete formal qualifications providing a sound foundation to return to the community and obtain employment.

Meredith & District Lions, Meredith Community Centre and FRRR, \$30,000

A partnership project to design and construct an innovative nature based playground for families in the Meredith district.

Geelong Mums \$15,000

To develop the Volunteer Plus Project, increasing opening hours and volunteer shifts to meet the rapidly rising need for the emergency relief service.

Lifeline Geelong Barwon Region \$5,811

To upgrade information technology and website, improving communication within and between Lifeline and the community.

Samaritan House \$34,500

To establish an income generating 'share house' for previously homeless men, with a productive orchard and garden in its grounds.

Secondbite \$15,000

To enable the expansion of the fresh food redistribution service for 91 support agencies, schools, kindergartens and refugees in Geelong and surrounding region.

UnitingCare Geelong \$30,000

To appoint a worker to coordinate new initiatives in the region including emergency relief services, new resources for the homeless and socially isolated and income stream enhancement.

Volunteering Geelong \$15,000

To purchase equipment to support the fit out of the meeting and training spaces at the new Geelong Community Hub.



Multicultural Aged Care 'Mindful Moves' participants.



Western Edge Youth Arts Belonging Interactive Ensemble.

EDUCATION SUPPORT

Australian Breastfeeding Association Greater Geelong Group \$4,800

To support volunteers to attend the Victorian conference and Health Professional seminars and share this information with mothers and their families.

Bethany Community Support \$30,000

To support Early Connections, an early intervention and prevention program designed for parents, their babies and children aged from birth to five years of age.

Bravehearts Geelong \$6,250

To support the Geelong Education Team to deliver a preventative, personal safety program to 9,000 young children to educate, empower and protect against sexual harm.

Reading Out of Poverty \$23,000

To develop a partnership with Wathaurong to provide early literacy support to indigenous children and their parents, promoting a love and habit of reading.

FAMILY SUPPORT

Barwon Child Youth and Family \$25,000

To support the Strengthening Family Connections program focusing on family skills training and emotional connection between parents and children in high risk families.

Geelong Food Relief Centre \$30,000

To support further the Mini Mart at 1 Little Smythe Street to provide a centrally located service, improving access to those in need of food relief.

Minerva Community Services \$20,000

To purchase a vehicle to expand outreach to more vulnerable women and children that live in rural areas.

Wesley Centre for Life Enrichment \$10,000

To support a counselling service for those experiencing significant life challenges, available to all people regardless of income, background, ethnicity or religion.

HEALTH SUPPORT

Anam Cara House \$30,000

To support the Palliative Care Function and Mobility Clinic with a focus on supporting carers, allowing patients to remain at home for as long as possible.

Hope Bereavement Services \$14,000

To increase the service's capacity to provide free, qualified bereavement support to any person affected by the death of an adult.

St John Ambulance Victoria Barwon Division \$5,085

To purchase new garage doors at the Lara facility, enabling volunteer access to their Ambulance without fear of injury and improving security.

Stroke Association of Victoria \$20,000

To support the Life After Stroke pathway, with the first stroke support centre located in Geelong.

The Humour Foundation \$8,415

To enable Clown Doctors to deliver an art in health program at Barwon Health, supporting sick children with doses of fun and laughter.

The Sanctuary Counselling Centre \$18,000

To support the engagement of a third counsellor, helping individuals and families facing life challenging illness or bereavement.

The Water Well Project \$3,000

To improve the health and wellbeing of migrants, refugees and asylum seekers through a health literacy program, improving equitable access.

HERITAGE & ARTS SUPPORT

Back to Back Theatre \$9,400

To develop a new residency model that will be produced many times in the future for different community members.

Geelong Gallery \$10,000

To support the Gallery's inclusive learning program, providing broader exposure of the visual arts and improved engagement of the Geelong community.

Queenscliffe Maritime Museum \$5,395

To treat three glass skylights and the library windows, protecting the museum's precious collection and meeting conservation standards to seek reaccreditation.

Lorne Community Arts and Culture Foundation \$8,000

To support the Lorne Festival of Performing Arts new outdoor community stage.

TRAINING & RESEARCH

Deakin University \$30,000

To implement research using Geelong Osteoporosis Study participants to better identify individuals vulnerable to muscle dysfunction.

Geelong Animal Welfare Society \$12,250

To advance volunteer services, improving efficiency for animals and further skill development of volunteers.

SalvoConnect \$34,000

To develop a training and resources package for Geelong Withdrawal Unit staff to support the implementation of a new model of care for methamphetamine withdrawal.

YOUTH

CatholicCare \$30,000

To implement a Refugee and Asylum Seeker Youth Support 3214 program, supporting students, who are newly arrived, within a school setting.



Street performance at Lorne Festival of Performing Arts.

Cottage by the Sea \$8,794

To run a 'Take a Break Camp' for 20 disadvantaged children from the Geelong region.

Lions Village Licola \$8,000

To provide young children with the opportunity to attend a unique summer camp adventure with professional carers and volunteer mentors.

Lorne Community House \$5,800

To implement 'Mentoring Lorne', a creative program addressing social isolation and community disengagement in high school students.

Somebody's Daughter Theatre Company \$20,000

To implement a full time 'arts led' education program for 'school-refusers', based at CourtHouse Youth Arts in partnership with Newcomb Secondary School.

Ten02 \$13,000

To engage with young people on the Bellarine Peninsula in the Ten02 garage, teaching vital motor vehicle restoration skills.

Western Edge Youth Arts \$4,000

To support 'Belonging Interactive', a cultural leadership project delivering community education about respectful relationships and race-based discrimination.

Supporting Education



Susanne Womersley (Sacred Heart SIP Co-ordinator), Brian Quarrell (Geelong Community Foundation SIP Mentor); supporting the 2016 Sacred Heart Grantmaking Committee.

Schools in Philanthropy (SIP) Program

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

The aim of the program is to inspire young people to begin a life-long commitment to giving through activities that have a positive impact on the communities in which they live, and will one day work.

The Foundation appoints experienced mentors who guide students through the grant-making process including

assessments of funding applications, interviewing potential grant recipients and making funding recommendations. The program is also designed to facilitate school and student involvement with the Foundation and gain an understanding of current community issues.

This year 28 students from Bellarine Secondary College, Belmont High School, Christian College and Sacred Heart College reviewed 12 grant applications for a variety of organisations including Cottage By The Sea, Hope Bereavement, The Australian Breast Feeding Association and St John Ambulance. The program culminated in presentations by the students to our Board to recommend grant allocations and to showcase the skills they have acquired from the program.

Back to School (BTS) Program

In 2016 the Foundation provided 1,300 vouchers of \$50 each through local schools for young people in need in our community.

We are proud to partner in the BTS Program with FRRR (Foundation for Rural & Regional Renewal), a national program supported by a number of trusts and foundations including \$10,000 from the Glover Foundation, \$2,000 from the William

Angliss Charitable Fund and \$45,000 contributed by the Foundation.

Through the Principal and School Well Being Officers, the \$50 vouchers are provided to identified students and families which are redeemable for items such as school uniforms, clothing, shoes, school bags and stationery items, all necessary to start the school year.

The difference that a gift of \$50 can make should not be underestimated.

Scholarship Recipients

Tom Cleary Memorial Scholarship

Jack Steel

3rd Year Bachelor of Agricultural Science at Melbourne University.

Allison Murphy Memorial Scholarship

Rachael Brodie

4th Year Arts/Commerce at Deakin University.

Grant Spotlight

Samaritan House

“Harry (not his real name) arrived at the house in an unstable mental state.”

By providing funding to allow for staff outreach time of up to 24 hours per week, Samaritan House has developed to change the face of homelessness in Geelong. So many men express the benefits of feeling at home and the desire to take the opportunity to make a new start. Several men in the past year have graduated to Foundation 61 where they have addressed their addiction problems. Through the Foundation grant, Samaritan House has furthered its presence in the Geelong community providing invaluable support.

Gradually with encouragement, Harry resumed his medication, attended to his mouth and teeth infections which resulted in happiness and relief of stress. He has drawn up a proposal whereby he and the other graduates of Samaritan House can assist in



Samaritan House clients enjoying companionship and chess.

working to help the house. The men have encouraged others to assist. When these men move into their own accommodation they wish to keep connected. Many men are unable to keep accommodation out of loneliness and depression. These men aim to prevent this happening by staying

connected and part of the Samaritan House family.

The men will do fundraising as a group with other volunteers, including operations such as sausage sizzles and other great concepts to assist with improving the awareness of the plight of homeless men.



Children enjoying Bethany's supported playgroup

Bethany Community Support

Bach (not his real name) is the father of two children and they all attend one of Bethany's Supported Playgroups.

Bach is from Turkey and his wife does not speak any English. Bach feels that it is important for his children to interact and socialise with other children and for him to have contact with other parents.

Bach finds the structure, predictability and routines of the playgroup, such as sitting together for a healthy snack, packing away toys together and story/music time really helpful with the parenting of his children.

Tom (not his real name) is a single father who also attends a Bethany Supported Playgroup with his son. Tom has been concerned that his son has little social interaction with other children and by attending a playgroup he has the opportunity to socialise with other children his own age.

Your Gift Working Forever

You can make a difference to your community by investing in the Geelong Community Foundation. Your donations will be invested wisely and build a lasting legacy for future generations and the future of our community.

The Foundation invites the public to contribute to the tax-deductible Foundation Gift Fund with all gifts pooled for investment purposes. Non tax-deductible gifts, such as bequests, are credited to the Foundation's Open Fund and pooled with other bequests. The Foundation also offers the option to develop a Scholarship Fund with currently 8 funds supporting a range of Donor initiatives.

Donation Options

Donor Named Fund

Your Named Fund is your donation account that allows you to add a name to your giving. Your donation carries the name of the Donor or the Donor's family (or it can be made anonymous). The name may honour someone or preserve the memory of a family member, friend or significant person. We encourage contribution to these funds by our Donors annually.

An Unrestricted Gift to our General Fund

The donation in this case can be used by the Foundation to make a wide range of charitable grants through the annual grant program.

Donor Preference

Donors, including those with a Named Fund, may indicate their preference for a particular charity or area of impact such as aged care, health or disadvantage etc.

Bequests

People can make a gift as a bequest in their will. The bequest can be recognised by name if the Donor wishes or it can be made as an anonymous gift.

Donations 2015/16

The Foundation has grown to 113 Named Funds with 9 new funds added in 2016. The Foundation thanks and acknowledges those individuals and organisations that have identified the Foundation as their partner in philanthropy.

New Named Funds

Agar & Whitehead Family, Illingworth Family, Peter & Annette Tanner, Swanborough, Kitson Family and Anonymous Fund No. 8.

New Bequests

Fred & Pauline Flanagan Bequest and the Estate of JC Bowen.

New Scholarship Fund

J & C Gulli Scholarship Fund.

Donations to Existing Named Funds

Adroit Insurance Group, Advisory Partners, Allison Murphy Scholarship, Anonymous No. 3, 5, 6 & 7, Antony Family, Betts Family, Crowe Horwath, Deam Family, Dennis & Denise Peacock Family, DR & VJ Lawrence, Dr Haz Hussain-Yusuf, Ed & Sharon Coppe, EF & W Dimmick, Fagg Family, Fisher Family, Fleur Nicholson, Fraser & Brownbill, G & H Work, G Wood Family, George, J & C Gulli Family, Henderson Family, James Kavanagh, J & P Brockman, Jason Breen Scholarship, John & Prue Webb, Justin van Laar Memorial, LBW, Les & Trevor Cole, Louise Gourlay, Miles Family Scholarship, Muirfield Financial Services, Quarrell Family, Reilly Family, Ron Thompson Scholarship, Singer Family, SS & J Neville, Tom Cleary Memorial Scholarship, Torney Family, Williamson & Baulch Families.

Brockman & General Fund Donors

V Anderson, I Boyd, J Buckland, P & W Crowe, B & S Harvey, K Jenkins, S & I Macauley, J & B Morwood, R Palmer, B Provan, M Rix, R Robinson, P & G Rodgers, C von Diebitsch.

If you would like to donate or require more information, please contact;

Gail Rodgers

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Sally Friend

Development Manager

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Michael Dowling and his grandchildren.

Our Named Funds

Named Funds are a growing way philanthropists can give to the Geelong Community Foundation. The gift in these cases can carry the name of the Donor or the Donor's family. The name may honour someone or preserve the memory of a family member, friend, pioneer or outstanding citizen. The following Named Funds have been established:

| | | |
|--------------------------------------|---|---------------------------------------|
| Adabrae Fund | Estate of Lesley Yvonne Taylor | MJ & HJ Fraser and JW Brownbill Fund |
| Adroit Insurance Group Fund | Estate of Margaret Ann Cody | Muirfield Financial Services Fund |
| Adroit Golf Day Fund | Fagg Family Fund | Nash Family Fund |
| Advisory Partners Fund | Fisher Family Fund | Neville & Dianne Crane Fund |
| Agar & Whitehead Family Fund | Fleur Nicholson Fund | O'Shannassy Family Fund |
| Alan & Sheila David Family Fund | Frank Costa Fund | PA Caldwell Fund |
| Allison Murphy Scholarship Fund | Fred & Pauline Flanagan Fund | Pam & Richard Austin Family Fund |
| Alsop Family Fund | Geelong Northern & Eastern Suburbs Fund | Patrick and Ann Rowan Fund |
| Angelo Kakouros Fund | G Wood Family Fund | Peter & Annette Tanner Fund |
| Anonymous Funds 1, 3, 4, 5, 6, 7 & 8 | G & H Work Family Fund | Peter & Judith Hudson Family Fund |
| Antony Family Fund | Hayden Family Fund | Quarrell Family Fund |
| Apco Fund | HDL Fund | Ramia Family Fund |
| Backwell IXL Fund | Henderson Family Fund | Ray Frost Family Fund |
| Bailey Family Fund | H & M Munday Fund | Reilly Family Fund |
| Bain Family Fund | Illingworth Family Fund | RLB Fund |
| Barber Fund | James M Kavanagh Fund | Robin & Marjory Gray Fund |
| Betts Family Fund | Jason Breen Scholarship Fund | Ron Thompson Scholarship Fund |
| Bourke Family Fund | J C Bowen Fund | Ross & Jan Synot Family Fund |
| Coltman Family Fund | J G Moffatt Fund | Rotary Club of Highton Fund |
| Corio Community Contact | John & Prue Webb Fund | Singer Family Fund |
| Corless Family Fund | J & C Gulli Family Fund | SS & J Nevile Fund |
| Crowe Horwath Fund | J & C Gulli Scholarship Fund | Stewart Family Fund |
| Darryn Lyons Fund | J & P Brockman Fund | Surf Coast Charitable Fund |
| Deam Family Fund | Justin van Laar Memorial Fund | Swanborough Fund |
| Denis & Denice Peacock Family Fund | Kenneth Neil Stott Fund | T & H Santalucia Family Fund |
| Donald Geoffrey Neilson Fund | Kitson Family Fund | The George Fund |
| Dorothy Jean Scholarship Fund | Lake Imaging Fund | The Rural Education & Retraining Fund |
| Dowling Family Fund | LBW Fund | Tim & Mary Farley Family Fund |
| DR & VJ Lawrence Fund | Les and Trevor Cole Fund | Tom Cleary Memorial Fund |
| Dr Haz Hussain-Yusuf Fund | Lino & Marina Bisinella Fund | Torney Family Fund |
| Ed & Sharon Coppe Fund | Louise Gourlay Fund | WAM Fund |
| Edwards Family Fund | McHarry's Buslines Fund | Wheeler Financial Services Fund |
| E F & W Dimmick Fund | McManus Family Fund | Whyte Just and Moore Fund |
| Estate of Harold Leighton | Michael & Louise King Family Fund | Williamson and Baulch Families Fund |
| Estate of Howard Hitchcock | Miles Family Scholarship Fund | Yvonne Bernath Fund |

Donor Stories

Our Donor stories not only depict the diversity of our community but also demonstrate how the Geelong Community Foundation meets the ‘giving’ needs of a wide audience. To read the unabridged stories of our Donors, please visit our website www.geelongfoundation.org/our-donors-named-funds

ADROIT INSURANCE GROUP FUND

Adroit Insurance Group began in Geelong as “Verrell Insurance Brokers” in 1978. Strong community focus & a real desire to make a difference & provide support to the communities in which its people work & live led to the development of its fund in 2006.

ALAN & SHEILA DAVID FAMILY FUND

Alan David OAM (1913-2005) & his wife Sheila were committed to the Geelong community throughout the six decades of their married life.

Their four children, Susan, Robert, Graeme & Murray are all involved with the Foundation.

ALLISON MURPHY SCHOLARSHIP FUND

Alli was Geelong-raised, attended Clonard College then completed a Bachelor of Arts (Journalism) at Deakin University. Alli's vocation became strategic communication, and she worked as a federal parliamentary media adviser to former Senator Judith Troeth, then across private, public and not-for-profit sectors.

In 2004 Alli founded Redstick Strategic Communications specialising in government relations, community engagement, and public relations.

In the ensuing decade Alli played a critical role in many key Geelong achievements including Simonds Stadium redevelopments and TAC's relocation to Geelong. Alli was a trusted advisor, strategist and confidante and a great friend to so many. Above all, Alli was a loving, and loved, wife to Peter, mum to Charley and Lucy and step mum to Tom. Alli tragically passed away on 25 February 2014, aged 42.

The Allison Murphy Scholarship is dedicated to the memory of Allison (Alli) Murphy. The Scholarship will give women from the Geelong region the opportunity to follow in Alli's footsteps and study at Deakin University majoring in political studies, media or marketing.

ANTONY FAMILY FUND

Brian & Barbara have been residents of Geelong for 32 years following their move from Melbourne in the 1970's. Their four children & six grandchildren all live in the Geelong area. Brian & Barbara are very keen supporters of many local charities & Brian was a member of Rotary for many years.

BACKWELL IXL

Backwell IXL Pty. Ltd. has grown from a blacksmith's shop in Geelong West to a diversified Australian manufacturer of domestic appliances, pressed metal products & metal castings. Ebenezer Backwell set up business as a blacksmith in 1858, in Aberdeen St, Geelong West. The Backwell family started the Backwell IXL Fund in support of the Foundation's objectives to assist people in need in our community.

BAILEY FAMILY FUND

After retiring as CEO of the ANZ Bank, Will & Dorothy decided to “put something back into the community” in recognition of the benefits they had enjoyed. They established a Charitable Bequest through ANZ Trustees & co-founded a drop-in centre for street people & the marginalised in Melbourne. Upon relocating to Geelong, they decided to support the Geelong Community Foundation & Will was an active director of the Foundation from 2002 to 2009.

CORLESS FAMILY FUND

Ed & Win are currently the proprietors of Rural & Garden Supplies Wallington & are developing the Kingston residential estate in Wallington. Both have been actively involved in community service organisations for many years. They are heavily involved in the Lions Club Foodbank in Ocean Grove. Having lived in the local community for decades they decided to establish their family fund to “give something back” to the community.

COLTMAN FAMILY FUND

Dr Kay Colman was born in Ballarat & first came to Geelong to complete his secondary schooling. He then graduated in Medicine at Melbourne University. He did his postgraduate training in obstetrics & gynaecology in Melbourne & London where he obtained his higher degree. Kay and his wife Barbara maintain an ongoing interest in education.

CROWE HORWATH

In 2010, Crowe Horwath established a Named Fund with the Geelong Community Foundation as part of their longstanding commitment to, & involvement with the Geelong community to ensure their support is allocated where it is needed most. With a history dating back over 60 years (through Geelong firm Day Neilson & WHK), Crowe Horwath is now the fifth largest accounting firm in Australia.



Barwon Child Youth & Family 'Strengthening Connections' between parents and children.

DARRYN LYONS FUND

Darryn Lyons, past Mayor of the City of Greater Geelong, lives by one simple philosophy 'Think Big'. Coming sixth in "Celebrity Big Brother" in the UK, Darryn donated his winnings to the Foundation through the Darryn Lyons Named Fund. Early in 2012 he also donated the winnings from his time in the Australian TV show, *Excess Baggage*.

Darryn Lyons is pleased to give back to his home town through a named fund with the Foundation.

D G NEILSON FAMILY FUND

The children of the Foundation's first Chairman, Geoff Neilson, established this fund to honour his contribution to the Geelong community. Dr Heather Neilson lectures in English Literature at the Australian Defence Force Academy, in Canberra. Timothy Neilson is a commercial lawyer and director of Greenwoods Freehills, specialising in taxation.

Susan Neilson is well known in musical circles as a singer & actor & works in administration at a Melbourne Primary School.

DOWLING FAMILY FUND

Michael & Lynne Dowling moved to Geelong in early 1976. The Dowlings have been active in the Geelong community for many years & have contributed to many charitable & community organisations. Michael & Lynne enjoy being part of the Geelong community & being members of many local organisations. By contributing to the Foundation, they hope they can assist organisations with their programs & that worthwhile new initiatives can be undertaken to improve & enrich the Geelong community.

DR HAZIZUL HUSSAIN-YUSUF FUND

Dr. Hazizul Hussain – Yusuf is a Micro-biologist at a private research laboratory within the Geelong Hospital. Haz is no newcomer to Geelong as he first came here to study at Geelong Grammar School in 1980. He came back to work in Geelong after completing his Masters Degree & PhD in Microbiology at the University of Kagoshima, in Japan.

ED & SHARON COPPE FUND

Sharon & Ed Coppe travelled the world together through Ed's career with global giant, Mars Incorporated. They returned to Geelong in 1995 with children, James, born in Geelong, in 1990 & Alex, born in the UK, in 1993.

Today Sharon follows her passion, working as a psychologist with Barwon Health, Lewis & Lewis, in private practice, & as a casual lecturing at Deakin University. Ed operates Strategic Investment Management & is very involved in community life.

E F & W DIMMICK FUND

Edwin Dimmick was born in 1938, in Queensland & grew up at Boonah. He completed a course in textile technology at the Gordon Institute of Technology, in Geelong & followed this with a part-time science course at the University of Queensland. Ted married Wendy Philbrick, in 1961 & they moved to Geelong in 1970 where Ted started his own business, Geelong Weavers. In 1995, when Fletcher Jones was about to close Ted felt it could continue as a successful business. Ted's drive & strong leadership enabled Fletcher Jones to survive as a retail chain for a further 16 years. Ted started a named fund in the Foundation in 2005.

HAROLD LEIGHTON FUND

Harold Leighton was born in East Geelong in 1905 & moved, when quite young, to North Geelong, where he lived for 90 years in a house built by his father.

Always known as a good man, good friend & good neighbour, Harold died in 2004. His wish was for his estate to be used to help the people of Geelong & as a result, part of his estate came as a gift to the Geelong Community Foundation.

HOWARD HITCHCOCK FUND

Howard Hitchcock, 1866 to 1932, was one of Geelong's most public spirited citizens from a family noted for its benefactions to worthy causes. The legacy of Howard's leadership as mayor is still evident today in many of Geelong's amenities and infrastructure.

He established a substantial bequest fund for charitable purposes so that his family's values could be perpetuated in the Geelong community. The residue of that fund was given to the Foundation after several substantial grants were made to other Geelong organisations.

KITSON FAMILY FUND

The late Rob Kitson was a Fellow of the Institute of Chartered Accountants. He went to Geelong College in 1959 & subsequently worked for Price Waterhouse, Cheetham Ltd. Group & then Huyck. He was Treasurer of United Way (now Give Where You Live) for 13 years & is a Life Member.

He was married to Chris (dec.) for 39 years & has three children & six grandchildren. Chris was involved in many community groups including Pony Club, the Geelong Show Council, Riding for the Disabled & the Barwon Hunt Club.

He subsequently married Barb. She worked in the region in community nursing, research & academia for 41 years, completing a Hons degree & PhD at Deakin University. Her main interests were in child & family health.

ESTATE OF LESLEY TAYLOR

Lesley Taylor B.A. Dip APA, Dip Ed, Cert. Hospital Administration, was born in Benalla Vic & came to Geelong when her father arrived from Bathurst NSW to become Manager of the Geelong Gas Company. Lesley's mother was a nurse & she followed her mother into the field of healthcare. They lived in Drumcondra.

Lesley died in 2011 and her wish was that her estate be used to support people & animals in the Geelong region. As a result, a significant part of her estate has been entrusted as a gift to the Geelong Community Foundation.

ESTATE OF MARGARET ANN CODY

Margaret Cody was born in Melbourne in 1933. Her education was at Sacred Heart College & the Mercy Hospital followed by Midwifery training at the Royal Women's Hospital in Melbourne. Margaret worked at the Geelong Hospital as well as in Canada to broaden her nursing experience.

Margaret's major lifetime interest was Geelong & the people of this region. She has entrusted \$900,000, being the major portion of her estate to the Foundation.

FAGG FAMILY FUND

The Fagg Family are passionate supporters of the Geelong community through both active involvement in many organisations & financial support.

The late, Bert Fagg, born in 1917, grew up & was educated in Geelong. He trained as a carpenter/joiner & went on to become a director of the family timber & hardware business - Fagg's Mitre 10.

The late Ruth Fagg spent much of her childhood in country towns in Victoria, including a period in Geelong. After training as a secondary teacher, she settled in Geelong when she & Bert married in 1945.

Bert & Ruth combined their 'hands-on' involvement with significant philanthropic support for a myriad of charitable organisations, both in Geelong & beyond. Their support of the Foundation, through a Named Fund has become a significant part of this. Their sons Barry & Keith Fagg are continuing this support.



Over \$120,000 was contributed to education in 2016.

FRANK COSTA

A life-time resident of Geelong & passionate family man, Frank has demonstrated his support for the community through many acts of generosity to charitable & other causes across the entire region.

Frank was awarded the Order of Australia Medal in 1997, in acknowledgement of his service to youth & the community. When it comes to philanthropy & donating to charitable causes, one of which is the Foundation, Frank says that he is grateful for the success he has had in business & in his family life. It gives him pleasure to be able to “give back to the community” that has been so supportive of him throughout his life. He encourages others to do the same.

ESTATE OF FRED & PAULINE FLANAGAN

In 1964 Pauline De La Perrelle, originally of Canterbury, Kent, England, married Geelong Football Club legend Fred Flanagan and they took up residence at Torquay.

However there was no time for a honeymoon as Fred had just been appointed as fuel agent in Geelong for Neptune Oil Company where he built a successful petroleum distributorship business. The Flanagan's retired in 1981 and turned their attention to helping others through Geelong Legacy.

Able supported by Pauline, Fred held a number of positions with Geelong Legacy including President and was also inducted into the Legacy Foundation of Victoria as President.

After 12 years of enjoyable residence at the Abervale Retirement Village in Grovedale, Fred passed away in January 2013. Pauline passed away in March 2015 and their Estate provided a number of legacies to not for profit organisations including \$200k to the Foundation.

G WOOD FAMILY FUND

Graeme Wood was born in Geelong in 1940 & educated at North Geelong Primary School & the Geelong Junior Technical College in Moorabool St. Graeme obtained a plumbing apprenticeship with W C Dunn & Son where he worked for eight years before moving to Quick & Fowler Plumbers. After four years at Q & F, Graeme moved to P J Hatwell Builders for two years before starting his own plumbing business as a partnership with wife Joan in 1970.

Sadly, in 1984 Joan died & since then Graeme has continued operating G J & J F Plumbing. Graeme is a great contributor to community through his 23 year membership of Belmont Rotary. To add to his community work, he has established a fund in the Foundation which will give permanent support for our community in the years ahead.



Dawn and Daisy from Cherished Pets

HENDERSON FAMILY FUND

Whether building up footwear retail store chain Vogue Shoes, pioneering embryo transfer techniques in the cattle industry or jointly founding Highton Village Shopping Centre, Barry Henderson, supported by his wife, Janet, has always been an innovator. The Geelong community gave great support to Barry & his family through Vogue Shoes & they are pleased to be able to give back through the Foundation and other charities they support.

J & C GULLI FAMILY FUND

Jim & Catherine Gulli were born in Geelong & have lived in this city for over 40 years. Both studied mathematics & science at Deakin University where they met & were married shortly after graduating. They have four children. Jim & Catherine have supported charitable organisations throughout their married life but see the Foundation as an effective way of distributing financial aid to worthy organisations within the Geelong community. They know that the Foundation has a better understanding of the needs of people within this region & can ensure their donation is used most efficiently.

J & P BROCKMAN FAMILY

Over many years, John & Patricia Brockman supported many charitable organisations & were pleased to be able to consolidate their giving through one local source, a named fund. This philanthropic outreach, which continues to build into the future & beyond their passing, was a further attraction to them. John & Pat married in 1962 & raised four daughters, all musicians: John had three children from his first marriage to Jean, a fine concert pianist: Stephen - flautist & conductor - & Francine & James, both of whom predeceased him. In July 2013 John died & in recognition of his wonderful contribution to the musical life of Geelong, many people made gifts to the Brockman Family Fund.



Somebody's Daughter Theatre Company 'Anchoring the Wind...Because I Matter' performance.

JUSTIN VAN LAAR MEMORIAL FUND

The van Laar family have established a Memorial Fund in the name of Justin van Laar who died at a young age from cancer. This fund has as its primary aim, the support of projects & programs related to cancer research & support of those being treated for cancer in all its various forms.

Justin's elder brother, Ryan, works in cancer research. He obtained his PhD in Molecular & Cellular Biology at the University of Melbourne, after achieving his Bachelor of Science (Honours), Biotechnology, at Deakin University. Barton van Laar was a very active director of the Foundation from 2006 to 2010.

KEN STOTT FUND

The generosity displayed by Ken Stott to the Geelong Community Foundation well & truly gave it the essential start that was needed to make it the success it has become today.

Ken grew up in Geelong & attended Newtown & Belmont State schools & began his working career as a carpenter with builder R.J. Gunn. From carpentry he graduated to joinery & also developed his drawing talent into the design of house plans for builders, banks & home owners.

After five years with R.J. Gunn, Ken moved to the joinery department at J.C. Taylor & Sons Pty Ltd. while continuing to develop his drafting business. Early in World War 2, his drawing skills were recognised by Lou Bandt & he was offered a job in the advanced design office at Ford where he worked for 30 years. While at Ford he studied metallurgy & mechanical drawing at night at the Gordon Institute of Technology. He also studied & became a skilled investor in property and the stock market. After retiring in 1970, Ken continued to invest in stocks with considerable success. He died in 2005.

Ken was a modest, self effacing & pragmatic man who was generous in spirit & deed. He dedicated his gifts to the Foundation, to generate income which can be used to assist people who are in difficult circumstances & need help to assist them to enjoy a better life.

LAKE IMAGING

Established in 2002, Lake Imaging is an independent radiology group providing quality services throughout Geelong, Ballarat, western & central regional Victoria & outer western Melbourne.

The doctors of Lake Imaging have been responsible for bringing many new radiology services to regional Victoria. Lake Imaging decided to establish a fund within the Foundation enabling support to be provided to eligible charitable organisations across the region.

LES AND TREVOR COLE FUND

Les Cole was born in Moolap West, Geelong, in 1914. After leaving school he worked for W Eagans, followed by Cheetham Salt, until he was 21. In 1936 he became a driver for F H Tucker & Sons, a funeral firm established in Wycheproof, country Victoria in 1883. When Charlie Tucker died in 1954, Les took over the day-to-day running of Tuckers.

Les Cole died in 2001 & he would be extremely proud that the company continues to serve the needs of Geelong & district people today. He spent over 60 years of his life supporting members of the community in their time of need. The Cole family has taken the wonderful initiative of developing a Fund in the Foundation as a memorial to Les Cole.

LINO & MARINA BISINELLA FUND

When 10-year-old Lino Bisinella arrived in Melbourne, in 1954, he never envisaged that half-a-century later his name would be well-known throughout Geelong as a successful businessman.

Leaving school, Lino began a five-year apprenticeship as a plasterer at F C Walker & Sons, Geelong &, after three years, founded his own plastering business in 1965. Lino sold L Bisinella Plasterers to Pioneer in 1994 to concentrate on property development in the Lara area. Lino & Marina have four children, with three working in the family business. Through the Foundation, Lino, Marina & family are now giving back to the community which has supported their businesses since the early 60's.

McHARRY'S BUSLINES FUND

For 80 years, McHarry's buses have been transporting people around Geelong.

McHarry's has become the largest bus company in Geelong, with around 170 buses. John's son Ashley is now general manager & director & daughter, Lisa works in administration. With staff of around 250 people, McHarry's has served Geelong well over the past 80 years and is also serving the region's needy through its Foundation Named Fund.

McMANUS FAMILY FUND

Tony McManus was inspired to establish a family fund due to his concern at the gap between the resources available for community support in the Geelong region & the needs of local disadvantaged.

After participating in the Leaders for Geelong Program, he developed his strong interest in mental health & when his brother Mick took his own life, Tony became an ambassador for Beyond Blue.

MICHAEL & LOUISE KING FAMILY FUND

Born in Geelong, Michael was educated at St Joseph's College, after which he was employed in the Victorian Premier's Department, the Geelong Regional Commission and the Victorian Government Agent General's Office in London, England.

He trained as a funeral director in London, returning to Geelong in 1983 to join his father in the family business King's Funeral Services.

Born in Camperdown, Louise moved to Geelong where she completed her secondary education at Sacred Heart College. She began her career at Geelong Hospital, graduating in Nursing. Having established this fund, they now hope that others will follow their lead.

MUIRFIELD FINANCIAL SERVICES

A leading Geelong-based financial planning firm, Muirfield Financial Services is focused on providing specialized advice for those aged over 55 and has been helping pre-retirees & retirees enjoy a better lifestyle since 1989.

Business partners, Hayden Torney, Melinda Planken & Matt Torney established the Muirfield Financial Services fund and provide regular donations to the Foundation to support the local community each year. The Foundation has proven to be a great way for this business & team to give back to the broader Geelong communities.

NEVILLE & DIANNE CRANE FAMILY FUND

Neville Crane was born in Pinnaroo, just over the Victorian border in South Australia & his early life was on the family's wheat farm north of Murrayville in the Victorian Mallee. He moved to Geelong in 1961 where Neville gained a Diploma in Accounting from the Gordon & later a degree from Deakin University as one of its first graduates. In 1989 Neville moved into financial planning with National Mutual & in 1997 merged his business with Errol Smith into the Planwell Financial Group. Neville & Dianne are conscious of the needs of less fortunate people & have a real interest in trying to make a difference.

QUARRELL FAMILY FUND

Terang-born Brian Quarrell's employment with the Bank of New South Wales, later Westpac took him to many country towns around Victoria. Geelong was where the old St Joseph's College pupil decided to make his home. In 1972 he married Helen & the couple has two children, Prue & Jarrod. Brian is a member of the Geelong Business Club & was president in 2003/4. He is putting back into Geelong through the Foundation & is a current Board Member.

RAMIA FAMILY FUND

The late Ray Ramia, well known as the developer & owner of the Sphinx Hotel, arrived in Geelong in 1947 as a 21-year-old. He arrived for a short visit to see his grandmother, who was in ill-health & planned to return with her to Lebanon. She refused to leave Geelong, so Ray stayed to look after her. Ray developed the Golf View Hotel in 1971 to diversify his business interests & in 1997, he & son George updated the Golf View, renaming it The Sphinx Entertainment Centre.

Ray had a passion for Geelong & the city is richer in many ways due to this man.

ROBIN & MARJORIE GRAY FUND

Robin & Marjorie Gray would be aghast at having a fund named after them. They were humble people, typical of the everyday mums & dads who serve the community quietly without raising any attention to themselves. Partly for this reason, this fund has been established by their daughter & son-in-law, in recognition of the people in the community who weather the storms of life, maintain honesty & integrity & faithfully serve their family & community behind the scenes.

Many decades ago Robin & Marjorie lost their nine-month-old daughter, Julie-Anne, in a motor vehicle accident but no bereavement support was available for such losses in those days. The Robin & Marjorie Gray Fund has therefore been established to assist & support those who face a similar journey.

ROSS & JAN SYNOT FAMILY FUND

Ross & Jan Synot have been actively supporting a range of Geelong's charitable, community & sporting organisations for more than 40 years. Ross is a fourth-generation Synot in Geelong, his great-grandfather John arriving in 1848. Ross was educated at Geelong College, qualified as an accountant & joined Grace McKellar Centre which became the passion of his working life.

Jan's early years were in Numurkah before coming to Geelong as a teenager with her family. An accomplished artist, Jan is a partner in the "art is studio & gallery" in Geelong.

SS & J NEVILLE FUND

Jane Neville was born in Malvern, Victoria, the youngest child of Essington Lewis, the great Australian industrialist & wartime director of munitions, who built BHP into one of the most efficient steel companies in the world.

Jane attended primary school in Melbourne, before moving to Woodend, where she completed her secondary education. She qualified as a physiotherapist & worked for the Victorian Health Department. Jane & her late husband Sandford, had three children & settled in Research. Jane has been a great supporter of Riding for the Disabled, making her properties available for horse-riding activities. She has generously supported a range of charitable causes over the years but these days utilises the resources of the Foundation to manage her philanthropic distributions.

T & H SANTALUCIA FAMILY FUND

Born in Sicily, in 1926, the ninth of 11 children, Tom Santalucia migrated to Geelong in 1955 & has become a successful local businessman. Geelong benefits from Tom's success as he has given back to his community through the Foundation.

In 1957, Tom met his wife Hildegard & together they operated a small retail shop & developed their business experience, later acquiring a local supermarket. The young couple had two children, Tim & Lisa.

Tom & Hildegard also acquired commercial freehold properties across the Geelong region, through to 1997 when Hildegard passed away. In 1992 Tim took on various roles within the family companies & was joined by his sister, Lisa, in 2001. In 2002, Tom retired from most company duties to focus on his six grandchildren.

Tom was always involved in the Geelong community, supporting school activities, as a member of the Rotary Club of Geelong & the Knights of the Southern Cross and treasurer.

TORNEY FAMILY FUND

Hayden & Sally Torney have been successful high achievers, who also find the time to be active contributors to their community through health, youth & disadvantaged young people as well as being generous supporters of the Foundation.

In 1989, Hayden left teaching & with his wife Sally started Muirfield Financial Services. Over 25 years they have built Muirfield into a very successful financial planning organisation, specialising in servicing clients over 55. Hayden & Sally have three children.

WHEELER FINANCIAL SERVICES

Established by W.E.(Pat) Wheeler in 1964, Wheeler Financial Services was one of Geelong's longest standing businesses providing financial advice and services.

In October 2013 Bendigo Bank purchased the business and it now trades under Bendigo Financial Planning and continues to service its client base in the Geelong and District region. Services include financial planning, Superannuation advice, Self-Managed Superannuation specialists, Centrelink and Aged Care planning along with Insurance and Estate Planning advice.

WHYTE, JUST & MOORE LAWYERS

The WJM Legal practice dates from 1877 when T.N. Whyte opened his office at 74 Yarra Street, Geelong. In 1904 Messrs Just & Moore (who had been in partnership since 1896) purchased Whyte's practice & the merged firm has practiced under the name of Whyte, Just & Moore, at 27 Malop Street, ever since.

YVONNE BERNATH FUND

This is a tragic story, but one of love & faithfulness. While knowing she had weeks to live, due to cancer, Yvonne attended to the affairs of her friend of over 35 years, Dietmar (or Max), to ensure his ongoing care with dementia. Yvonne died in April 2013 & this perpetual fund was set up & added to by relatives & friends of Yvonne & Dietmar, including Dietmar's sister in Germany.

The proceeds of this Fund are recommended for cancer & dementia research & care.

Board of Directors



John Miles

CPA

Chairman

Joined the Foundation Board in 2011.
Chairman since 2015.

Deputy Chairman 2014 - 2015.

John Miles retired from a distinguished career at Marcus Oldham College spanning 30 years. His roles included Company Secretary and Deputy Principal Business and Development. John studied accounting at the Gordon Institute and is a member of CPA Australia.

John was awarded a Winston Churchill Memorial Trust Fellowship in 1997 and is on the Victorian Chapter Winston Churchill Memorial Trust Selection Committee. He is also a Trustee of the Geelong Advertiser Music Trust.



Kate Betts

B.Arts RMIT

Deputy Chairman

Joined the Foundation Board in 2010.
Deputy Chairman since 2015.

Kate is a communications and marketing professional who has worked with Alcoa of Australia, Westfield, Give Where You Live and Melbourne Airport. Kate is currently the Senior Communications and Engagement Advisor for Alcoa's Eastern Australian Asset Management and Planning group.

Kate is a graduate of the Partnership Brokers Accreditation Scheme and the Leaders for Geelong program. She is co-founder of Geelong Mums and has held board positions with Sacred Heart College Council, Dalai Lama Geelong visits, Rainbow Riders, Central Geelong Marketing and the Alli Murphy Memorial Scholarship Fund.



Lachlan McColl

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

Treasurer

Joined the Foundation Board in 2013.

Lachlan is an Associate Principal at Crowe Horwath with a specialty in the valuation of businesses, legal entities, shareholder equity and intangible assets. He is a Chartered Accountant with more than fourteen years' experience including roles with Crowe Horwath, Price Waterhouse Coopers and in the financial sector in the United Kingdom.

Lachie is a graduate of the Leaders for Geelong Program and a Board Member of the Geelong Kindergarten Association. He is also actively involved in the development and delivery of business valuation subjects for Kaplan Online Higher Education.



Barry Fagg
B.Com (Melb) CPA MAICD

**Joined the Foundation Board in 1999.
Chairman 2005-2009.**

Barry is Chairman and part-owner of Fagg's Mitre 10, a family hardware and timber business, established in Geelong in 1854. Fagg's is the eighth oldest family business in Australia. He was a Director within the Mitre 10 group of companies, from 1987-2004, including Chairman of Mitre 10 Australia Ltd from 2002-2004.

He is treasurer of The Geelong College Council and the Geelong Art Gallery.

Barry is a past Campaign Director, Past President and a Life Governor of United Way Geelong (now Give Where You Live). He was also Vice-President of United Way Australia. In 2003 Barry was awarded a Centenary of Federation Medal for service to the community.



Ed Coppe
B.Com FAICD FCPA

Joined the Foundation Board in 2008.

Ed is Managing Director of Ed Coppe Wealth Management.

He has been Chairman of G21 Geelong Strategic Alliance, Deputy Chairman of the Regional Development Australia Barwon South West Committee and Board Member of the Committee for Geelong.

Born and educated in Geelong, Ed had an international business career with Mars Inc. in Finance, Strategy and Marketing roles before returning to Geelong in 1995. He has been Mayor of the City of Greater Geelong and served on the Major Events, Central Geelong, Geelong Chamber of Commerce and Give Where You Live Boards.



Richard Anderson
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 practices. 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 the Brotherhood of St Laurence and Chairman of St Laurence Community Services. Currently Richard is a board member of Sirovilla, a Trustee of the Australian Youth Classical Music Competition and a Council Member of Marcus Oldham College.



Brian Quarrell

Joined the Foundation Board in 2009.

Brian and his partners successfully developed and operated Wheeler Investment Advisors Pty. Ltd, for 25 years. In October 2013 the business was purchased by Bendigo and Adelaide Bank. Brian is a Senior Financial Advisor with Bendigo Financial Planning. Prior to Wheelers, Brian had a successful 22-year career with Westpac in banking, finance and investment-related roles.

Brian is also Chairman of the Geelong chapter of the Financial Planning Association of Australia. He is a Certified Financial Planner and also a SMSF Specialist Advisor™. Brian has served as a Committee Member of the Geelong Business Club and was President of the Club from 2003-2004.



Penny Whitehead

B.Arts (Hons) Monash M.IB (Melb)

Joined the Foundation Board in 2014.

Penny is the Managing Director of Provincial Wisdom, a marketing services and advisory company that she started in 2009. Through this company, Penny provides services such as marketing plan development, PR, social media and event management. Prior to this she worked with Yering Station in the Yarra Valley with three years as Brand Manager.

Penny moved to Abercrombie and Kent as Marketing Manager. She has a strong grounding in sales, marketing and public relations. Penny has gained experience in the not for profit sector with the Australian Kidney Foundation, the Lorne Community Arts and Culture Foundation, the Anti Cancer Council and as a Board Member of the Geelong Gallery.



Val Lawrence

OAM DSI

Joined the Foundation Board in 1999. Chairman 2009 to 2015.

Val is a Civil Celebrant and currently the Vice Chairman of Red Cross Zone 6. She is also a Board member of the Queenscliff Maritime Museum, a Director of the Queenscliff Point Lonsdale Community Enterprise and President of the Point Lonsdale/Queenscliff Red Cross Unit. She was a Councillor of the Borough of Queenscliffe from 1999 to 2008 and Mayor of the Borough 2001 to 2004 and was awarded a Federation Medal in 2001 for her Community Service.

Val has been a Board member of the Grace McKellar Centre, Vice President of the Barwon Heads Golf Club, Board Member of the Geelong Otway Tourism, Chairman of Red Cross Zone 6 and an original Board member of G21.

She is an honorary JP, and Chairman of the St George the Martyr 150th Celebrations Committee.



Diane Ritchie

Joined the Foundation Board in 2010.

Diane has had a distinguished teaching career across regional Victoria, and in recent years has worked for Rice Village and Kalkee Geelong in public relations and project management roles. She is a former Bannockburn Shire Councillor and was instigator and chair of the Wallington Strawberry Fair and Meredith Country Festival.

Diane is currently co-ordinating rural Catholic parish and farm duties on the family farm at Bamganie near Meredith.



Hayden Torney

B.Econ, Dip.Ed. Monash

Joined the Foundation Board in 2014.

Hayden is a Certified Financial Planner and Managing Partner of Muirfield Financial Services having founded the company in 1989. Muirfield Financial Services specialises in meeting the financial planning needs for those over 55. Following graduation he moved to the Surfcoast and taught Economics and Legal Studies at Oberon and North Geelong High schools for 17 years. Hayden is a Life member of the Jan Juc SLSC where he has served as President and Club Captain. He has been a Committee Member of the Geelong chapter of the Financial Planning Association for over 15 years.



David Lindsay

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 involved with the Law Institute in lawyer education in the areas of Wills and Estates and Business law. He was an active Apex member for many years and was Chairman of Villamanta Disability Legal Services. He is currently 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.

Staff Members



Gail Rodgers

FICDA, Dip. Bus. (Gov.), Chisholm

Chief Executive Officer

Joined the Foundation in February 2016.

Gail joins the Foundation with a distinguished career spanning roles in the community and corporate sectors, and a passion for the Geelong community. 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).



Sally Friend

PG. Dip – Marketing (Monash),

B.Arts (Melb)

Development Manager

Joined the Foundation in December 2014.

Sally has extensive experience in the philanthropic sector including the role of Executive Manager for Direct Marketing and Corporate Relations at the Royal Children's Hospital in Brisbane.

Board Committees

GRANTS COMMITTEE

Diane Ritchie (Convenor)

Kate Betts

David Lindsay

Val Lawrence

Ex-Officio John Miles

FINANCE, RISK & AUDIT COMMITTEE

Lachlan McColl (Convenor)

Richard Anderson

Barry Fagg

Val Lawrence.

Ex-Officio John Miles

INVESTMENT COMMITTEE

Brian Quarrell (Convenor)

Ed Coppe

Hayden Torney

Ex-officio- John Miles

Investment Advisors

Michael Browne (JB Were)

Adam Blennerhassett (JB Were)

NOMINATING COMMITTEE

John Miles (Convenor)

Kate Betts

Barry Fagg

Val Lawrence

DONORS COMMITTEE

John Miles (Convenor)

Barry Fagg

David Lindsay

Hayden Torney

Brian Quarrell

Penny Whitehead

Tim Santalucia (Ambassador)

MARKETING AND PUBLIC RELATIONS COMMITTEE

Kate Betts (Convenor)

Barry Fagg

Penny Whitehead

Ex-officio- John Miles

GOVERNANCE & PLANNING COMMITTEE

Richard Anderson (Convenor)

Val Lawrence

Barry Fagg

Ex-officio- John Miles

GEELONG COMMUNITY FOUNDATION

INCOME AND EXPENDITURE STATEMENT for the year ended 30 June 2016

| GIFT FUND | 2016 | 2015 |
|---|-------------------|-------------------|
| Income | \$ | \$ |
| Donations received | 327,780 | 380,254 |
| Income from investments | 552,941 | 608,070 |
| Profit on sale of investments | 285,269 | 351,890 |
| | 1,165,990 | 1,340,214 |
| Expenditure | | |
| Management fee | 118,105 | 140,820 |
| Net Income | 1,047,885 | 1,199,394 |
| Grants paid and provided | (460,000) | (429,500) |
| Net increase/(Decrease) in value of investments | (718,457) | 103,438 |
| SURPLUS / (DEFICIT) FOR YEAR | (130,572) | 873,332 |
| Balance of Gift Fund at beginning of year | 11,393,972 | 10,520,640 |
| BALANCE OF GIFT FUND AT END OF YEAR | 11,263,400 | 11,393,972 |

ADMINISTRATION FUND

| | | |
|--|-----------------|----------------|
| Income | | |
| Management fees | 193,400 | 211,843 |
| Interest | 1,830 | 880 |
| | 195,230 | 212,723 |
| Expenditure | | |
| Administration expenses | 226,258 | 166,631 |
| SURPLUS / (DEFICIT) FOR YEAR | (31,028) | 46,092 |
| Balance at beginning of year | 29,826 | (16,266) |
| BALANCE OF ADMINISTRATION FUND AT END OF YEAR | (1,202) | 29,826 |

BALANCE SHEET as at 30 June 2016

| FUNDS | 2016 | 2015 | FUNDS | 2016 | 2015 |
|-------------------------------|-----------|-----------|----------------------------------|--------|--------|
| | \$ | \$ | | \$ | \$ |
| Settled sum | 980 | 980 | Ramia Family Fund | 12,359 | 12,876 |
| Gift Fund, comprising: | | | John & Prue Webb Fund | 39,448 | 35,998 |
| Kenneth Neil Stott Fund | 6,539,055 | 6,812,502 | HDL Fund | 39,863 | 41,530 |
| Les and Trevor Cole Fund | 170,008 | 174,557 | WAM Fund | 13,426 | 13,987 |
| Bailey Family Fund | 91,449 | 95,273 | Crowe Horwath Fund | 22,958 | 21,293 |
| Fagg Family Fund | 1,127,128 | 1,158,636 | Hayden Family Fund | 58,012 | 60,438 |
| Coltman Family Fund | 119,142 | 124,124 | T & H Santalucia Family Fund | 11,692 | 12,181 |
| E F & W Dimmick Fund | 196,089 | 193,912 | JG Moffatt Fund | 22,917 | 23,875 |
| Adroit Fund | 174,186 | 170,120 | Anonymous No. 1 Fund | 12,139 | 12,647 |
| Justin Van Laar Memorial Fund | 52,514 | 49,509 | Barber Fund | 12,363 | 12,880 |
| RLB Fund | 12,474 | 12,995 | Singer Family Fund | 59,404 | 35,929 |
| Lino & Marina Bisinella Fund | 121,338 | 126,412 | Pam & Richard Austin Family Fund | 23,849 | 24,846 |

BALANCE SHEET as at 30 June 2016

| FUNDS | 2016 | 2015 | FUNDS | 2016 | 2015 |
|---|-------------|-------------|-------------------------------------|-------------|-------------|
| | \$ | \$ | | \$ | \$ |
| Torney Family Fund | 451,298 | 418,155 | Williamson and Baulch Families Fund | 4,171 | 3,305 |
| Henderson Family Fund | 19,176 | 18,448 | Louise Gourlay Fund | 8,988 | 8,843 |
| Ross & Jan Synot Family Fund | 11,811 | 12,304 | H & M Munday Fund | 12,002 | 12,504 |
| Peter & Judith Hudson Family Fund | 9,009 | 9,386 | Frank Costa Fund | 10,168 | 10,593 |
| Anonymous No. 6 Fund | 39,747 | 39,379 | PA Caldwell Fund | 15,336 | 15,977 |
| Quarrell Family Fund | 27,224 | 23,154 | Adabrae Fund | 5,588 | 5,822 |
| Ed & Sharon Coppe Fund | 25,349 | 25,396 | J & P Brockman Fund | 15,959 | 14,181 |
| Betts Family Fund | 26,584 | 27,435 | Surf Coast Charitable Fund | 12,240 | 12,752 |
| Geelong Northern & Eastern Suburbs Fund | 131,538 | 137,040 | Deam Family Fund | 20,756 | 16,448 |
| DR & VJ Lawrence Fund | 18,330 | 16,391 | Backwell IXL Fund | 103,512 | 107,840 |
| McHarrys Buslines Fund | 22,599 | 23,544 | J & C Gulli Family Fund | 12,329 | 9,169 |
| Wheeler Financial Services Fund | 17,183 | 17,901 | Muirfield Financial Services Fund | 19,920 | 17,683 |
| McManus Family Fund | 11,726 | 12,217 | G & H Work Family Fund | 8,452 | 5,758 |
| SS & J Nevile Fund | 12,295 | 12,809 | Yvonne Bernath Fund | 53,934 | 56,189 |
| Anonymous No. 4 Fund | 2,330 | 2,427 | Angelo Kakouros Fund | 1,545 | 1,609 |
| Alan & Sheila David Family Fund | 47,376 | 49,357 | Alsop Family Fund | 2,058 | 2,144 |
| James M Kavanagh Fund | 68,132 | 58,489 | Michael and Louise King Family Fund | 10,560 | 11,001 |
| Dr Haz Hussain-Yusuf Fund | 52,319 | 44,205 | Stewart Family Fund | 2,544 | 2,651 |
| Neville & Dianne Crane Fund | 57,708 | 60,121 | O'Shannassy Family Fund | 4,939 | 5,145 |
| Antony Family Fund | 29,475 | 25,556 | Bourke Family Fund | 10,131 | 10,554 |
| Tim & Mary Farley Family Fund | 23,083 | 24,048 | Nash Family Fund | 29,282 | 30,506 |
| Anonymous No. 3 Fund | 19,864 | 17,569 | Fisher Family Fund | 27,916 | 20,955 |
| MJ & HJ Fraser & JW Brownbill Fund | 6,410 | 5,642 | Advisory Partners Fund | 5,958 | 3,088 |
| Darryn Lyons Fund | 117,431 | 122,342 | Fleur Nicholson Fund | 89,566 | 51,057 |
| The George Fund | 8,549 | 6,850 | Reilly Family Fund | 35,716 | 26,823 |
| Apco Fund | 10,597 | 11,040 | Anonymous No. 7 Fund | 19,836 | 15,461 |
| Whyte, Just and Moore Fund | 19,558 | 20,376 | General Fund | 138,785 | 133,750 |
| Dennis & Denice Peacock Family Fund | 7,524 | 5,806 | G Wood Family Fund | 19,614 | 10,197 |
| Lake Imaging Fund | 11,871 | 12,368 | Ray Frost Family Fund | 9,648 | 10,051 |
| Edwards Family Fund | 40,569 | 42,266 | Illingworth Family Fund | 9,824 | - |
| Dowling Family Fund | 15,308 | 15,948 | Peter & Annette Tanner Fund | 4,834 | - |
| Anonymous No. 5 Fund | 24,592 | 23,537 | Swanborough Fund | 4,869 | - |
| Bain Family Fund | 6,077 | 6,331 | Kitson Family Fund | 19,943 | - |
| Robin & Marjory Gray Fund | 158,831 | 165,472 | Agar & Whitehead Family Fund | 1,994 | - |
| Corless Family Fund | 16,721 | 17,421 | Anonymous No. 8 Fund | 1,998 | - |
| LBW Fund | 8,478 | 4,666 | Administration Fund | (1,202) | 29,826 |
| | | | | | |
| | | | | 11,263,178 | 11,424,778 |

Represented by**ASSETS****Current Assets**

| | | |
|---------------------|---------|---------|
| Cash at bank | 413,918 | 240,749 |
| Short term deposits | 300,952 | 253,879 |
| Debtors | 140,757 | 140,351 |
| | 855,627 | 634,979 |

Non-Current Assets

| | | |
|--------------------------------------|-------------------|-------------------|
| Investments, at net realisable value | 10,666,714 | 10,813,597 |
| TOTAL ASSETS | 11,522,341 | 11,448,576 |

LIABILITIES**Current Liabilities**

| | | |
|-------------------|-------------------|-------------------|
| Creditors | 233,302 | 5,495 |
| Provisions | 25,861 | 18,303 |
| | 259,163 | 23,798 |
| NET ASSETS | 11,263,178 | 11,424,778 |

GEELONG COMMUNITY FOUNDATION

INCOME AND EXPENDITURE STATEMENT for the year ended 30 June 2016

| OPEN FUND | 2016 | 2015 |
|---|-----------|-----------|
| Income | \$ | \$ |
| Donations received | 280,624 | 11,760 |
| Income from investments | 411,949 | 409,254 |
| Profit on sale of investments | 211,092 | 294,460 |
| | 903,665 | 715,474 |
| Expenditure | | |
| Management fee | 75,491 | 71,977 |
| Net Income | 828,174 | 643,497 |
| Grants paid and provided | (280,000) | (270,350) |
| Net increase/(Decrease) in value of investments | (451,565) | 220,722 |
| SURPLUS FOR YEAR | 96,609 | 593,869 |
| Balance of Open Fund at beginning of year | 8,012,891 | 7,419,022 |
| BALANCE OF OPEN FUND AT END OF YEAR | 8,109,500 | 8,012,891 |

BALANCE SHEET as at 30 June 2016

FUNDS

| | | |
|---|-----------|-----------|
| Settled sum | 100 | 100 |
| Howard Hitchcock Fund | 34,718 | 35,521 |
| Harold Ernest Leighton Fund | 101,601 | 103,951 |
| Corio Community Contact Fund | 545,994 | 558,625 |
| Donald Geoffrey Neilson Fund | 45,259 | 46,306 |
| K N Stott Family Fund | 4,229,107 | 4,326,944 |
| Patrick & Ann Rowan Fund | 26,611 | 27,227 |
| Geelong Northern and Eastern Suburbs Fund | 363,754 | 372,169 |
| Adroit Golf Day Fund | 375,209 | 313,025 |
| Estate Lesley Yvonne Taylor Fund | 1,121,012 | 1,146,945 |
| Rotary Club of Highton Fund | 16,536 | 16,918 |
| Estate of Margaret Ann Cody | 1,041,076 | 1,065,160 |
| Fred & Pauline Flanagan Bequest Fund | 198,542 | - |
| Estate of J C Bowen Fund | 9,981 | - |
| | 8,109,500 | 8,012,891 |

Represented by

ASSETS

Current Assets

| | | |
|--------------------------------------|-----------|-----------|
| Cash at bank and deposit at call | 510,680 | 69,363 |
| Debtors | 95,618 | 89,988 |
| Investments, at cost | 492,445 | 1,157,167 |
| Investments, at net realisable value | 7,418,557 | 6,694,783 |
| GST Receivable | 200 | 1,590 |
| | 8,517,500 | 8,012,891 |

LIABILITIES

Current Liabilities

| | | |
|-------------------|-----------|-----------|
| Creditors | 408,000 | - |
| NET ASSETS | 8,109,500 | 8,012,891 |

GEELONG COMMUNITY FOUNDATION INCOME AND EXPENDITURE STATEMENT for the year ended 30 June 2016

SCHOLARSHIP FUND

| | 2016 | 2015 |
|---|---------|---------|
| Income | \$ | \$ |
| Donations received | 32,484 | 48,751 |
| Income from investments | 6,982 | 3,799 |
| Profit on sale of investments | - | 18 |
| Net Income | 39,466 | 52,568 |
| Grants paid | (6,250) | (1,500) |
| Net increase/(Decrease) in value of investments | (6,561) | (266) |
| SURPLUS FOR YEAR | 26,655 | 50,802 |
| Balance of Scholarship Fund at beginning of year | 199,108 | 148,306 |
| BALANCE OF SCHOLARSHIP FUND AT END OF YEAR | 225,763 | 199,108 |

BALANCE SHEET as at 30 June 2016

FUNDS

| | | |
|---|---------|---------|
| Settled sum | 100 | 100 |
| Ron Thompson Scholarship Fund | 42,131 | 43,443 |
| Tom Cleary Memorial Fund | 6,575 | 6,312 |
| Dorothy Jean Scholarship Fund | 15,747 | 15,715 |
| Allison Murphy Scholarship Fund | 114,151 | 109,931 |
| Miles Family Scholarship Fund | 4,065 | 3,059 |
| The Rural Education & Retraining Scholarship Fund | 20,385 | 20,343 |
| General Fund | 26 | 25 |
| Jason Breen Scholarship Fund | 2,682 | 280 |
| J & C Gulli Scholarship Fund | 20,001 | - |
| | 225,863 | 199,208 |

Represented by

ASSETS

| | | |
|--------------------------------------|---------|---------|
| Cash at bank | 104,421 | 114,556 |
| Debtors | 1,591 | 581 |
| Investments, at net realisable value | 119,851 | 84,071 |
| NET ASSETS | 225,863 | 199,208 |

NOTES

1. 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.
2. 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. Grants can be made for charitable purposes without being restricted to tax deductible gift recipients, as is the case with the Gift Fund.
3. 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.

Corporate Supporters



CORMAC HANRAHAN



FOR FURTHER INFORMATION

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Geelong
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Your gift working forever

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