

ANNUAL REPORT

2020 - 2021



The Bass Coast Community Foundation acknowledge and pay respect to the traditional custodians of the land on which we operate, the Bunurong people of the South-Eastern Kulin Nation.

ABOUT THE FOUNDATION

The **Bass Coast Community Foundation** (the Foundation) was established in 2002 in response to a growing need for a sustainable source of funds for community projects. It operates exclusively in the boundaries of the Bass Coast Shire as an autonomous philanthropic organisation independent of religious and/or political persuasion.

Local donors contribute cash, trusts, bequests, or property to create permanent endowments that benefit people and/or community groups. To date the Foundation has distributed well over one million dollars to projects and organisations across Bass Coast that work to improve the lives of the people in the community.

WHO WE ARE

The Foundation is managed by a volunteer Board of Directors, who represent all areas of the Bass Coast region and bring a broad range of experience and skills to the operations of the Foundation.



Bass Coast Community Foundation Board 2021

Back Row L to R: Amy Dynes, Phil Friedlos, John Walsh (Treasurer), David Admans (Dep Chair), Charles Popple, Joanne Dixon.

Front Row L to R: Christian Stefani, Nina Barry-Macaulay, Kirsty Mawer (EO), Carol Blair (Chair), Kathy Hawke (not present)

The Bass Coast Community Foundation is a Company Limited by Guarantee and is registered as a charity with the Australian Charities and Not-For-Profit Commission.



CHAIR'S MESSAGE

2020- 2021 has been a year unlike anything we have seen before. It has been an immensely challenging year for our Bass Coast community, our partners and for the Foundation. The pandemic created a sense of uncertainty that our community has never experienced, an uncertainty that continues today. The community – the residents, the businesses, and the organisations - have adapted as best they can, but in many cases this situation has exacerbated and amplified some of the challenges and vulnerabilities that already existed in our community.



Like everyone else, the Foundation has adapted to virtual meetings and constant rescheduling of events, but the major impact has been on our donations. Quite understandably, the level of donations over the last two years has been significantly lower than in pre-Covid times. A priority for the Foundation in the forthcoming year will be to rebuild the level of donations so that we can continue to support the programs our community needs.

Understanding the impact of the pandemic on our community has been a key focus. Building on work started last year, funded by the Ecstra Foundation we have developed a Community Profile for Bass Coast. It has enabled us to identify vulnerable groups in our community – particularly those for whom financial vulnerability has been increased by the pandemic, and this has informed our strategic priorities for the forthcoming years.

The Foundation's strategy was finalised during a planning day held in March 2021, and resulted in the Board confirming our role as a community partner, philanthropic leader, and grant maker in the Bass Coast region. The agreed priority areas of focus are;

- Reducing the incidence and risk of homelessness and housing stress.
- Increasing the aspirations of young people through skills, knowledge, and learning.
- Increasing opportunities for local women and girls.

A number of the programs that we have supported this year are featured elsewhere in this report, but I would like to mention a couple of particular successes. The Women For Change initiative continues to provide focus both for the encouragement of women donors, and also in providing funding to support women and their families. We all enjoyed a great fundraising event for International Women's Day in March, and also this year the Foundation funded three organisations who successfully applied for grants under the Women For Change program.

With a focus on the young people in our community, the Foundation has been delighted to fund the Kids as Catalysts program at Newhaven Primary School. This program engages kids in solving real world issues that they care about in their community, and build life skills and resilience – more critical than ever right now.

The Board membership underwent a significant change during the year. At the Annual General meeting in October 2020 four of our directors, who collectively had given the Foundation over 30 years' service, decided not to renew their terms of office. We thank Sylvia Davey, Bruce Hydon, Paul Taranto and Angus Cameron for their commitment and generosity. Without directors from the community who donate at least 100 hours volunteer time each year to board activities the Foundation would not be able to function.

Fortunately, I am able to report that we've filled the director vacancies with another group of skilled and committed community members and welcomed, Phil Friedlos, Christian Stefani, Amy Dynes, Nina Barry-Macaulay, Joanne Dixon, and Charles Popple, to the team.

We have continued to partner with our valued donors, the Bass Coast Shire Council, FRRR, grant recipients and community members who provide pro bono services and valuable advice and insight to assist us in our work. Your support inspires us to work harder for our community and we thank you.

Finally on behalf of the Board I would like to acknowledge our dedicated, creative, Executive Officer Kirsty Mawer. Kirsty's energy and the connections she has made in the community, add significant value to the work of the Foundation.

This will be my final report on behalf of the Board and I acknowledge all those I have worked with over the last six years. I have learnt from you, enjoyed your company and friendship, and have absolute faith in the skill and commitment of the current Board to lead the Foundation, as it continues to deliver outstanding outcomes for the community we serve.



Carol Blair

Chair

THE PRIMARY FOCUS

The Bass Coast Community Foundation continues to build on a strong legacy of past directors, staff and volunteers. In March 2021 the board and executive officer formalised the strategic framework, illustrated below, which will direct activities into the future. Underpinning this framework is a solid business plan with assigned accountabilities for deliverables.

The Foundation will continue to work with the community organisations and charities to achieve its aims and advocate for our community. It will explore all avenues to secure funding and make available grants to address inequities.

STRATEGIC FRAMEWORK



KEY PRIORITY AREAS

Informed by research funded by Ecstra Foundation and commissioned by Profile Id as part of the Bass Coast Counts project, the Foundation has identified the following key priority areas over the coming five years:

Reduce the incidence and risk of homelessness and housing stress

- Housing stress continues to grow in Bass Coast. The groups most affected are single women over 60 and young people.
- The number of lone persons in low-income households in Bass Coast is higher than the Victorian average.
- Households experiencing rental stress increased by 11.6%.



Source: [Demographic characteristics of vulnerable or disadvantaged groups in Bass Coast. Id.com](https://www.profileid.com.au/research/demographic-characteristics-of-vulnerable-or-disadvantaged-groups-in-bass-coast-id.com)

Increase the aspirations of young people through skills, knowledge and learning

- Young people are the future of the community and their participation in every aspect of community life supports their development.
- 13% of 15–24 year-old young people were not employed or in education.
- A higher percentage of local Bass Coast children are developmentally vulnerable - with greater challenges to their health and fine and gross motor skills compared to the statewide average.



Increase opportunities for local women and girls



- Female participation in employment, education and community life delivers positive economic and social outcomes.
- 50% of women in Bass Coast have an individual income of less than \$499 per week compared with 38% of men.
- One third of women in Bass Coast live in households where they are alone, or a lone parent with dependent children.
- Bass Coast family violence rates are higher than the Victorian average. In Bass Coast for the 12 months ending September 2020 the family violence incidents were up by 32%.

HOW WE'RE DOING IT

The Bass Coast Community Foundation has been caring for the Bass Coast community for 19 years.

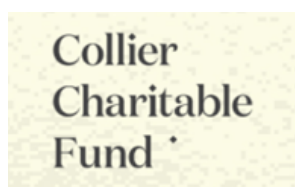
By working with donors and supporters the Foundation continues to build a community endowment to provide grants to local and grassroots charities to help tackle the current and future needs of the community.

The Foundation provides leadership on key community issues and help individuals, families, businesses, and groups to establish charitable funds to support causes they care about.

The stewardship of the community's philanthropic assets is a significant responsibility and the board take it seriously. The Foundation's philanthropic assets are overseen by a Finance, Audit and Risk Committee to ensure that the portfolio meets the Foundation's financial objectives in accordance with its Investment Strategy and Policy.

The Foundation's responsible investing approach aims to contribute to a stronger, fairer and more sustainable world; improve the overall financial returns of the portfolio; and increase its investment strategy's alignment with the values of the giving community.

Community partnerships are a vital contributor to success. The Foundation appreciate the support it receives from Bass Coast Shire Council in the form of a grant to help fund its operations, Cardell Assurance and Audit, and Herbert Smith Freehills for pro bono auditing and legal services.



THE YEAR IN REVIEW 2020 - 2021

AN OVERVIEW OF GIVING

Back to School Vouchers	\$25,000
Kids as Catalysts at Newhaven Primary School	\$25,000
Tertiary Education Awards	\$12,000
TAC Learner Driver Program L2P	\$ 5,000
Women for Change Grants	\$ 6,450
Various other community grants	\$ 1,500



KIDS AS CATALYSTS LANDS IN BASS COAST

In focusing on increasing the aspirations of young people in the region, in 2021 the Foundation funded the pilot delivery of the award-winning Kids as Catalysts program with Grade Five and Six students at Newhaven Primary School.

The six-month program teaches and supports groups of students to be positive change leaders by partnering with local organisations to design and deliver action projects that benefit the local community.

In addition to researching, designing and delivering real-life projects for their community, students have a chance to ‘pitch’ their project for funding and then present their final project at a showcase event. This provides students the opportunity to develop their social and presentation skills.

Despite the challenging circumstances, the program has seen significant success this year, with students and teachers alike reporting growing confidence and connection to community.

The Foundation is currently working with other local schools and potential funders to support the wider roll out of the program in 2022 and beyond.



WOMEN FOR CHANGE AWARDS - FIRST GRANT RECIPIENTS



Images L to R: Landcare Women on Farms Launch | Rescue Station Arts Wellness Warriors | Mitchell House Mature Driver Program

Under the auspice of the Foundation, the Women for Change working group use their collective skills to help other local women make positive life changes or take a step towards greater wellbeing.

From fundraising as part of International Women’s Day, the Foundation was able to award \$6450 to three local groups as part of the first Women for Change grant program aimed at helping Bass Coast women and girls better connect to their community and build resilience.

This included:

- **Bass Coast Landcare**, for an event to help women on farms access services, and increase awareness, connection and support;
- **State Coal Mine - Rescue Station Arts Inc**, to run an art therapy-based well-being program, including content on brain and body responses to stress, self-care strategies, mindfulness and self-compassion strategies; and
- **Wonthaggi Neighbourhood House’s L2P** driving program, to enable five local women, who may be facing barriers preventing them from gaining a driver’s licence, to participate in the L2P program where they would otherwise have been ineligible due to their age.

BACK TO SCHOOL VOUCHERS



For the 16th consecutive year the Foundation has distributed Back to School vouchers to local schools and Bass Coast Health’s Family Resource Centre. These \$50 Kmart vouchers are discretely distributed to families struggling to fund the expenses associated with their children returning to the classroom at the beginning of each school year.

Consistent feedback reinforces that the vouchers make a real difference to students' engagement at school. Indications are that there is likely to be a higher demand for vouchers in 2022, and planning is underway to meet this need.



L2P STEERING YOUNG PEOPLE IN THE RIGHT DIRECTION

Brothers Noah and Eli Zappa gained their probationary licence thanks to hours spent behind the wheel with a Bass Coast L2P program mentor.

The Foundation has funded the program since 2007, which has been recognised as the benchmark for similar programs across the state.



Photo: Burt Applebee (mentor), Eli Zappa (new driver), Noah Zappa (new driver), Mike Wellings (mentor) and Vince Baskerville (mentor).

Requiring 120 hours of supervised driving practice, Noah and Eli were guided by locals Burt Applebee, Mike Wellings and Vince Baskerville on the road, who are trained mentors for the program operating from the Wonthaggi Neighbourhood Centre. Their mum praises the knowledge and wisdom of the mentors in helping her sons get their licence.

"We really appreciate it and both boys are so excited to be able to use the roads. This will give them a great head start into their future jobs. The L2P program has been the making of them."

TERTIARY EDUCATION AWARD MAKES THE DIFFERENCE FOR CAITLYN

Local university student Caitlyn Allen aced the challenge of first year university in 2020 thanks to a \$1000 Tertiary Education Award grant, which enabled her to purchase a two-in-one laptop to complete her first year of a Bachelor of Science at the University of Melbourne.

With plans to study on campus in 2020 disrupted three weeks into semester by the onset of COVID-19, Caitlyn completed eight subjects of her course completely online from her hometown of Wonthaggi, achieving high grades for each.

The former Wonthaggi Secondary College student credits part of this achievement with access to the laptop, as it reduced her need to print, enabled her to mark up documents on screen, and save content quickly.

"Being able to buy a new laptop last year was a huge stress relief for me, and something I would not have been able to do without the Foundation's support."

In partnership with Aquasure, the Foundation provided grants to enable Bass Coast students to participate in and continue tertiary education, reducing the challenges local students have traditionally faced accessing tertiary education.



AN OVERVIEW OF GRANTS RECEIVED

Aquasure	\$12,000
Bass Coast Shire Council	\$25,800
Collier Charitable Fund	\$ 5,000
Ecstra Foundation	\$50,000
Foundation for Rural & Regional Renewal (FRRR)	\$25,000
International Women's Day Fundraiser	\$ 6,500

Thank!
You!

BASS COAST COUNTS - A COMMUNITY PROFILE FUNDED BY ECSTRA FOUNDATION

2020 saw the commencement of the Ecstra Foundation funded project *Bass Coast Counts; Collaborating with Community Providers & Funders to Build Financial Capability & Resilience across the Region.*



The aim of this research project (phase one) was to determine the financial vulnerability of the Bass Coast community and create a statistically significant profile that represents our community. This has established a data baseline and will be updated when the 2021 census data becomes available. This will provide a framework to map over time a longitudinal study of the financial vulnerability of Bass Coast.

The outcomes from the research did confirm with empirical data what was anecdotally known, providing a framework to support decision making when grant seeking and grant making. The profile has enabled targeting resources and directing focus into two areas in the community, with the project continuing into the next financial year.

Phase two of the project has focused on financial capability building within the community. Given the data from the research and the many COVID-19 impact reports highlighting needs of the vulnerable in the community, the Foundation has targeted the two most 'at risk' areas within the region, and are collaborating with community providers to implement impactful programs later in 2021.

The Ecstra Foundation funding has been a game changer for the Bass Coast Community Foundation's work and it is very grateful to have been a recipient of Ecstra's Building Community Financial Capability grant.

BASS COAST SHIRE COUNCIL: A PILLAR OF SUPPORT

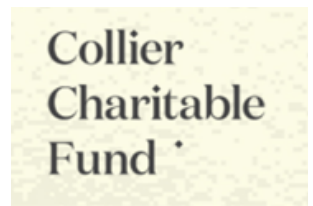


The Bass Coast Shire Council has been a major supporter of the Foundation since its inception in 2002.

The Council financially contributes to the Foundation's operational expenses and for this we are very grateful.

COLLIER CHARITABLE FUND ENABLES TECHNOLOGY UPGRADE

The Foundation was successful in 2020 securing a grant from the Collier Charitable Foundation to upgrade the office computing and phone capabilities. This grant took pressure off the operational budget and has enabled the Foundation to continue its work throughout COVID-19 lockdowns.



FUNDRAISING - INTERNATIONAL WOMEN'S DAY



Events supporting International Women's Day in Bass Coast generated more than \$6000 which was used to launch the first Women for Change grants, supporting initiatives to enable local women to be the best they can be.

A concert held in perfect weather on 7th March at Archie's Creek featured renowned musician Rebecca Barnard and resulted in approximately \$2500 in donations.

Attendees at a breakfast event on 9th March hosted by Bass Coast Shire Council, Bass Coast Health, Phillip Island Nature Parks and Westernport Water donated a similar amount.

The Foundation sees these events as an opportunity to highlight the inequities women in Bass Coast experience. Research shows that almost one third of women in Bass Coast live alone and have lower individual incomes than men. Improving equity is vital for growing a strong local economy and building healthy happy and thriving families.

Given the success of these events, the Foundation hopes to build on these fundraising activities in future years to further grow its grants program.



FINANCIAL OVERVIEW

The last year has been an extremely difficult time for everyone. The effects of the pandemic – the repeated long-lasting lockdowns and the general uncertainty this has produced – has impacted every aspect of business. The Foundation has not been immune to this.

The Foundation has seen a reduction in donations received over the last 18 months – quite understandably. This has been coupled with a reduction in investment returns. The bulk of endowment funds are in term deposits, and with interest rates remaining at historically low levels the return on these has dropped.

In spite of this reduction in its sources of funding, the Foundation has increased the value of grants distributed to the community. It has recognised that the needs of the community have, if anything, increased as a result of the pandemic, and is driven to maintain the financial support that community programs need.

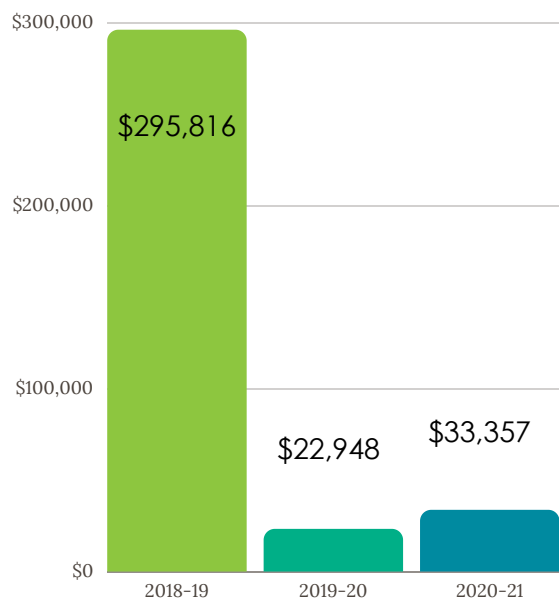
From a financial point of view, the Foundation’s key focus for the forthcoming year will be to rebuild the level of donations and bequests, so that it can continue to support a range of community programs.

ANNUAL DONATIONS / BEQUESTS

From 2019-2021

The life-blood of the Foundation are those members of the community who support its work through donations and bequests. It is these contributions that allow the Foundation to fund programs that improve the lives of people in the community.

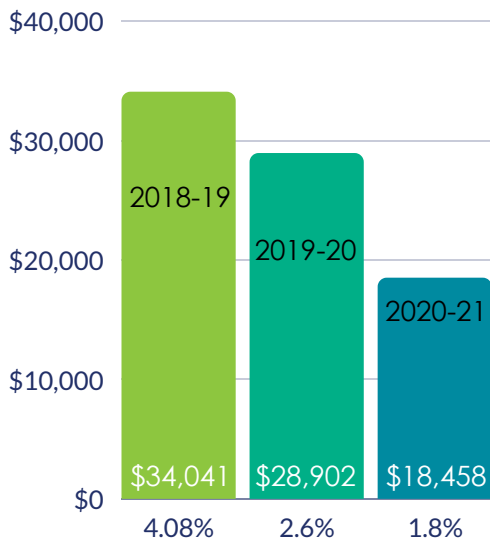
Over the last two years, as expected given the disruption and uncertainty caused by the pandemic, there is continuing pressure on the level of donations. The Foundation is hoping that as the post-COVID world emerges, people will again feel able to donate to support the community.



The area of donations is truly one where “from little things, big things grow”. Your small regular donation adds up with the donations of others, and quickly builds a body of funds that the Foundation can direct to those in need. If you can, please give a little to support programs in your local community. Go to www.bccf.org.au/donate

RETURN ON INVESTMENTS

From 2019-2021



The Foundation seeks to grow the funds that it receives through a balanced portfolio of investments, including term deposits, shareholdings, and cash, which is managed by professional advisors.

The last three years have seen steadily declining interest rates, to historically low levels. This has driven down the Foundation's investment returns to an extremely low level in 2020-21, which has impacted the level of funds available to support the community.

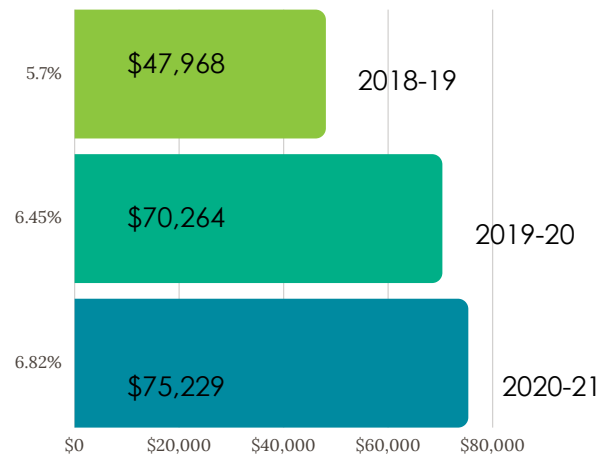
The Foundation continues to work with its investment advisors to achieve the best returns that it can, whilst also managing the risk inherent in any investment strategy.

GRANTS DISTRIBUTED

From 2019-2021

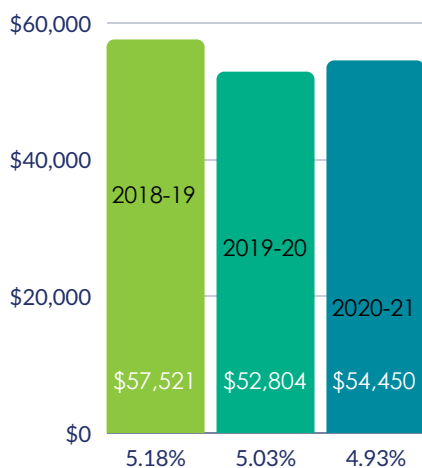
Aware of the continuing needs of the community, the Foundation has been able to increase the value of grants and awards to organisations and individuals across Bass Coast in 2020 - 2021.

The value of these grants was just over \$75,000, and exceeds the 4% asset value that the Foundation is obliged to distribute each year.



ANNUAL ADMINISTRATION COSTS

From 2019-2021



The Foundation is acutely aware of the need to minimise administrative costs in order to maximise the funds available to the community. Administrative costs include the costs of the Executive Officer, office rent, and basic operational costs.

As a measure, the Foundation has reduced its administrative costs to be less than 5% of the total value of the Foundation's funds, which is a good result.

The Foundation receives generous support towards its administrative costs from Bass Coast Shire Council, and also received support in the form of Boost and Job Keeper.

ANNUAL AUDITED ACCOUNTS

Cardell Assurance and Audit provide auditing services to the Foundation.

The 2020 -2021 audited accounts are available on the Foundation's website and the Australian Charities and Not-For-Profit Commission (ACNC) Charities Register.

<https://www.bccf.org.au>

<https://www.acnc.gov.au/charity>

Below is a consolidated report taken from the Foundation's audit report for your information.

Bass Coast Community Foundation Trust
ABN: 20 391 663 724
Bass Coast Community Foundation Open Fund
ABN: 35 151 927 173

STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME
FOR THE YEAR ENDED 30 JUNE 2021

		Trust		Open Fund		TOTAL	TOTAL
	Note	2021	2020	2021	2020	2021	2020
Revenues from ordinary activities	2	72,404	(7,055)	149,211	31,916	221,615	24,861
Expenses from ordinary activities	3	(27,330)	(26,402)	(27,225)	(26,402)	(54,555)	(52,804)
Operating surplus / (deficit)		45,074	(33,457)	121,986	5,514	167,060	(27,943)
Grants and project expenses	3	(30,000)	(15,922)	(45,229)	(55,639)	(75,229)	(71,561)
Surplus / (deficit) from ordinary activities		15,074	(49,379)	76,757	(50,125)	91,831	(99,504)
Other comprehensive income		-	-	-	-	-	-
Total comprehensive income for the year		15,074	(49,379)	76,757	(50,125)	91,831	(99,504)

This statement should be read in conjunction with the accompany notes.

Bass Coast Community Foundation Trust
ABN: 20 391 663 724
Bass Coast Community Foundation Open Fund
ABN: 35 151 927 173

STATEMENT OF FINANCIAL POSITION AS AT 30 JUNE 2021

	Trust		Open Fund		TOTAL	TOTAL
	2021	2020	2021	2020	2021	2020
CURRENT ASSETS						
Cash at bank	19,910	22,918	69,940	96,636	89,850	119,554
Cash at bank - Admin	-	-	4,965	4,356	4,965	4,356
Term Deposit	254,719	252,375	515,169	509,693	769,888	762,068
Accounts receivable:						
- Imputation credit	1,614	2,678	1,585	2,834	3,199	5,512
- Administration	-	1,500	-	1,500	-	3,000
- Trust	-	-	53,492	30,329	53,492	30,329
GST refund	692	342	-	710	692	1,052
TOTAL CURRENT ASSETS	276,935	279,813	645,151	646,058	922,086	925,871
NON-CURRENT ASSETS						
INVESTMENTS						
Shares in listed companies at market value	140,274	99,159	137,715	97,569	277,989	196,728
TOTAL ASSETS	417,209	378,972	782,866	743,627	1,200,075	1,122,599
CURRENT LIABILITIES						
BCCF Education Grants (Note 5A)		-	-	12,659	-	12,659
Robert Salzer Grant (Note 5B)		-	-	7,791	-	7,791
ECSTRA Grant (Note 5C)		-	36,410	50,000	36,410	50,000
Women For Change (Note 5D)		-	-	6,331	-	6,331
Other creditors	53,492	30,329	1,982	4,849	61,194	35,178
Provision for Annual Leave	-	-	5,720	-	-	-
TOTAL CURRENT LIABILITIES	53,492	30,329	44,112	81,630	97,604	111,959
NET ASSETS	363,717	348,643	738,754	661,997	1,102,471	1,010,640
REPRESENTED BY:						
Accumulated funds	348,643	398,022	661,997	712,122	1,010,640	1,110,144
Current year result	15,074	(49,379)	76,757	(50,125)	91,831	(99,504)
TOTAL	363,717	348,643	738,754	661,997	1,102,471	1,010,640

This statement should be read in conjunction with the accompanying notes.

WITH DEEP GRATITUDE...

WE THANK EVERY DONOR, SUPPORTER AND VOLUNTEER

The Foundation is extremely grateful for the support received from local organisations, businesses and individuals, without whom we would be unable to support the Bass Coast community.

Donor Named Accounts include:

Glen & Sara Brown	Gerry Lonergan	Women for Change
Newnham Family, Education Fund	Phillip Island Account	
Vivian Docking Reith	Allan Bawden	

2020 - 2021 Donors also include several anonymous and cash donations, and:

Anne Davie	Jane Woods	Melanie Mumford
BJS Gippsland	Jessica Amy Vick	Melissa Nolet
Caravan Music	Joan James	Paul Taranto
Carol Blair	John Mumford	Peter Wonfor
Claire Emmott	John Walsh	Rotary Club of Inverloch
David & Sylvia Admans	Jordan Crugnale	Scully Family
Gerard Lonergan	Kellie Nichols	Sue Levy
Gert Els	Kelly Lucas	Sylvia Davey
Gillian Mertens	Kirsty Mawer	Teali Williams
Greg Baud	Linda Pellizzer	Teresa Capetola
Greig Mercer	Liz Stinson	Therese Dalmau
Heather Mabilia	Lucy Dewhurst	Tina Mayling
Irene Taylor	Marjorie Jane Scott	Trish Scanlon
Jacqui Paulson	Marley Mumford	

THE BOARD

During the reporting period 11 meetings were held. Attendances by each director were as follows:

	Eligible to Attend	Number Attended
Carol Blair	11	10
David Admans	11	10
John Walsh	11	11
Christian Stefani	10	8
Amy Dynes	10	10
Joanne Dixon	7	6
Nina Barry-Macaulay	7	6
Phil Friedlos	7	7
Charles Popple	5	4
Sylvia Davey	4	3
Bruce Hydon	4	4
Paul Taranto	4	3

CONTACT US

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ABN : 20 391 663 724

