

# Giving Options

## In this edition Designated Agency Funds

The Ballarat Foundation offers many options by which funds can be established from straightforward tax-deductible gifts through to a range of tailored funds.

In this edition, we feature the key points of a Designated Agency Fund:-

- Funds are held in the name specified by the donor. (If or when the donation meets the Named Fund Criteria) This can be individuals, partners, family names, a business name or in the memory of someone.
- Fund Earnings are directed to a specified organisation as directed by the donor. (and approved by TBF Trustees)
- Ongoing contributions, whilst not essential, are recommended at least for a few years.
- Donations to the fund are usually tax-deductible.\*\*
- Earnings are usually distributed by way of grants for specific projects or programs which are specific and accountable.
- Donors meeting the Designated Agency Fund criteria are able to be involved in presenting grants from the fund.

This is an ideal way to support a specific agency or organisation that is of significance to the donor and allows long term financial assistance to be made to that agency or organisation, both during the donor's life and in death.

Over time, with further contributions, a Designated Agency Fund can build to become a substantial community funding tool.

Interested? Call Noel on 5329 4613.

We are happy to discuss this and other options with you, obligation free. (See also the story, A Donor's Perspective in this newsletter)

\*\* Where tax-deductible gifts are received, conditions can apply limiting certain recipient options in accordance with Australian Tax Office requirements

## Breezeway



From left, Ballarat Foundation CEO Noel Trengove, OnTrack Personal Fitness managing director Craig Schepis and UNitingCare Ballarat's executive director Cliff Barclay at Breezeway.

In late 2006, local business man, Craig Schepis spent a night sleeping rough amongst homeless Ballarat people, to understand the needs of individuals and families "in desperate need of emergency relief for basic survival and social acceptance".

He filmed the experience.

On November 25th, 2006 that visual record was shown at the On Track Charity Ball, created to relieve the financial pressure for UnitingCare, one of many organizations providing emergency relief in our community to people who are isolated, marginalized, homeless or living in insecure accommodation.

The documentary has become an educational tool for schools and in the wider community.

The funding has been directed to UnitingCare Ballarat's Breezeway meals program, and will also help purchase a bread van to pick up bread for distribution to those in need.

The Breezeway Program started in 1998. Last year alone it provided over 22,000 meals.

Close to \$32,000 was recently donated, much of which was through the auspices of The Ballarat Foundation. It has been given at a crucial time to sustain the program through the coming winter months. Cliff Barclay, Executive Director of UnitingCare has expressed thanks to Craig for "a fantastic effort".

For Craig Schepis, it is a passionate commitment to the young people in our city, lecturing and mentoring youth on choice, personal development, vocational training and diversion, "hoping to narrow the gap from both sides of our community spectrum". ■

Photo courtesy of The Courier

## A Donor's Perspective



Val Sarah, AM

"I believe there may be emotional benefits in 'giving while living', rather than leaving money to benefit the causes you feel passionate about, in your Will.

How simple it can be!

As a very young child I was evacuated from war-torn England to safe haven

on Vancouver Island in Canada, and placed with a foster family. We've kept in touch, and our children and grandchildren are now visiting across the world.

The last 15 years of my working life were spent at Child & Family Services Ballarat. One of its finest programs is the Regional Foster Care Program. I'd like to think that, by supporting this program and others run by CAFS, I'm repaying a debt of gratitude to the family who took me in and gave me shelter all those years ago.

The establishment of a **Designated Agency Fund** through The Ballarat Foundation offered a formal structure through which I could give, not just as a 'one-off' gesture, but - through the corpus of funds - allocate fund earnings into perpetuity. I don't have to worry about management or legal issues, and my family can participate if they wish, when I die. This is a classic example of 'giving made easy... giving where it counts', and The Ballarat Foundation is the perfect vehicle to achieve your dreams". ■

Val Sarah, AM

## Community Grants 2007 - has your organisation applied?

The Ballarat Foundation is excited to announce that its 2007 Community Grants program gets underway in late June.

The grants are project based and the program covers a broad range of areas, made up of Health and Community Wellbeing, Education, Arts and Humanities, Sport and Recreation, Conservation and Environment, Research, and Community Development. Grants are not retrospective, are usually allocated in the range of \$500 to \$5,000

dollars and must be expended within 12 months.

The process is simple:

- Community groups and organisation scan download an application form from our website or can email or phone to have an application sent.
- This year we are running a workshop to assist organisations to complete their application and maximise their chance of success. This workshop will be held on Tuesday, July 31st at 5.00pm. Please contact The Ballarat Foundation to book your attendance.
- Complete your application and lodge it by close of business, Friday August 17th, 2007.

- Following the process of selection, undertaken by our Ethics and Allocations Committee and then approved by TBF Trustees, applicants will be notified during October.
- A grants ceremony recognising previous grants and presenting new grants will be held in early November.

If organisations you are involved in or know of in Ballarat are seeking financial support by way of a community grant, please encourage them to apply. ■

Applications obtainable from:  
Web [www.ballaratfoundation.org.au](http://www.ballaratfoundation.org.au)  
Email [info@ballaratfoundation.org.au](mailto:info@ballaratfoundation.org.au)  
Phone (03) 5329 4613



Now! For the Future

## Chairman's Message

The last few months have been busy for the Foundation. Our CEO, Noel, has been extremely active and the Board sub-committees have been developing strategies and programs in their areas.



We are very pleased to announce the appointment of Dr. Doug Lloyd to our Board of Directors. Dr. Lloyd is the Executive Director for The Committee for Ballarat and replaces Mr Peter Amor, a founding Board member, who has retired.

A new corporate image will be released shortly and will trigger a heightened presence in the community.

The Funds Development committee under Garry Lyons has been active in both developing strategies to grow the corpus and in exploring new ways in which the Foundation can support philanthropic activity in the City and at the same time create a new revenue stream to underpin our administrative costs. This is important as we keep our fees for managing funds as low as possible, maximising the amount that can be distributed to the community.

We were extremely excited by the decision of the Roadcon Group to Pledge \$500,000 to the Corpus over the next 5 years. Roadcon has accepted the challenge to put money into the community in this way and we challenge others to do so as well to whatever extent they are able.

This is an exciting time for the Foundation and we welcome your participation.

**Professor David James, AO  
Chairman**

## Largest pledge to date – a challenge to others!



The Ballarat Foundation Board of Trustees Chairman David James, left, Roadcon Group managing director Andre Agterhuis, centre, and Ballarat Foundation CEO Noel Tregrove announce the \$500,000 Roadcon Group Fund.

On Tuesday June 19, Ballarat based civil contractor and property developer, Roadcon Group, pledged \$500,000 to The Ballarat Foundation, to be received in \$100,000 instalments over five years. In doing so, Roadcon challenged other businesses and individuals to follow its lead.

This is the largest pledge The Ballarat Foundation has received in its six-year history and will form the basis of a Roadcon Group Fund. The money will be invested in the Foundation's corpus pool, with the earnings delivered to the community through the Foundation's annual grants program and occasional special one-off grants.

## From the CEO's desk



I am very excited to report to you that the Foundation is moving forward at a fast pace and that my Board and I are working towards a very exciting future for

The Ballarat Foundation. Our big news for this edition is the \$500,000 pledge from Roadcon Group, benefiting the community for decades to come.

I have a sense that this is a major turning point for the Foundation and that in the months and years ahead more and more businesses and individuals will realise the benefits of contributing to the community in this

As well as achieving capital growth, the Foundation will re-invest 10 per cent of the earnings from the pledge in the corpus, ensuring the ongoing growth of the Fund.

In supporting his actions at the recent press conference to announce this pledge, Roadcon Group Managing Director and Group Board Chairman, Andre Agterhuis, said "According to the Business Review Weekly, 95% of Australia's wealth is held or controlled by 5% of its population. I believe this fact provides a challenge, and indeed a social imperative, for successful businesses and high net worth individuals to engage with their communities and to embrace philanthropy.

If the Ballarat Foundation can raise a corpus fund of, say, \$5,000,000, the capital will never be lost, and with wise management and investment, a very meaningful amount of \$400,000 - \$500,000 could be distributed annually to community projects. In this way your gift 'would keep giving' into perpetuity.

By donating through The Ballarat Foundation, we have avoided the burden of administration, reporting, investment and distribution which would have been required to establish our own Foundation".

way. The more we receive, the more we invest and the more we can put back into the community.

We are working hard to develop better relationships with our stakeholders, be they donors or recipients. We held a very successful seminar in May for selected guests to learn more about philanthropy and its broader implications. Catherine Brown, of Catherine Brown & Associates, was the presenter. A lawyer and management consultant, Catherine has extensive experience in the development of innovative community and philanthropic organisations.

We are currently establishing a Scholarship Trust Fund and are developing a Community Service Model. These additions will broaden

The Roadcon Group believes that supporting The Ballarat Foundation is the most effective conduit for this donation, as it seeds community support, year after year.

Andre concluded, "In making this donation, my fellow Directors, Matt Agterhuis, Nick Grylewicz and Paul McCuskey, together with our wives and families, have accepted this challenge to support our local community, and we challenge others to do so as well, to whatever extent they feel they are able.

We are pleased and proud to donate through The Ballarat Foundation for the ongoing benefit of the community. With the funds invested in a corpus pool, the capital is never lost and donations are able to be distributed to community projects annually".

City of Ballarat Mayor, Cr. David Vendy, supported the community spirit and good citizenship of Roadcon Group and acknowledged the benefits of supporting The Ballarat Foundation in establishing itself as a strong and necessary contributor to the charitable structure within the community. ■

*Photo courtesy of The Courier*

and enhance the services offered by the Foundation. Our aim is to provide value in everything we do.

I am spending time talking to business, to individuals and addressing community groups including Rotary and Probus. This spreads our message allowing people to understand what we do, and is an ideal forum to hear what the community is looking for in their Community Foundation.

The Ballarat Foundation's annual grants process is currently getting underway for 2007. This year we are including a workshop for prospective applicants where we will provide guidance in completing an application. Grants from two major funds, operated under The Ballarat Foundation, the Courier Charitable Fund and the Telstra Country Wide Community Fund, will be

## 'Pinarc Toy Library Upgrade'



from left, James McNabb, 4, early childhood intervention and therapy manager Jan Ditchburn, Daniel Bell, 3, Leo Canny, Theresa Thorne, 3, and Ballarat Foundation CEO Noel Tregrove.

Well known local business family, the Canny Family, have a Named Fund with The Ballarat Foundation, through which they have donated generously to the Ballarat community.

Leo Canny suggested that their latest donation of \$3000 could be directed to The Pinarc Toy Library, which offers families, individuals or groups the option of borrowing toys, educational games, larger play equipment, or items from an extensive resource library. Approved by the Board of The Ballarat Foundation, the gift was handed over in a brief ceremony at The Toy Library recently. Whilst modest in amount, the impact of the gift is having a profound effect on the Toy Library.

The old and broken toys and equipment can now be replaced, and stocks

replenished. Pinarc's Pam Glenane said "Purchases will include specialist fine motor skills equipment and games, as well as upgrading display shelving for the toys".

The Library is designed to help children and adults with special needs to realize their full potential. It has a current membership of 70, which includes individuals, schools and kindergartens and other groups within the community.

Pam Glenane paid tribute to "The wonderful volunteers who help us to check and repair toys" and to The Ballarat Foundation for assistance with a donation which will be "a valuable contribution for the children of Pinarc". ■

*Photo courtesy of The Courier*

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announced in coming weeks.

In this issue there are some thought-provoking stories which give further support for the types of funds we operate and the assistance we give within the community. In this issue, our featured fund is the Designated Agency Fund.

Thanks to Saeed Salimpour, a very talented local University student, and to FRP Printing Pty Ltd who have once again provided newsletter compilation and printing on a pro-bono basis.

For more information, check out our website [www.ballaratfoundation.org.au](http://www.ballaratfoundation.org.au) As always, please feel free to write or call me on **5329 4613**. I am always happy to assist where I can. ■

**Noel Tregrove, CEO**

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