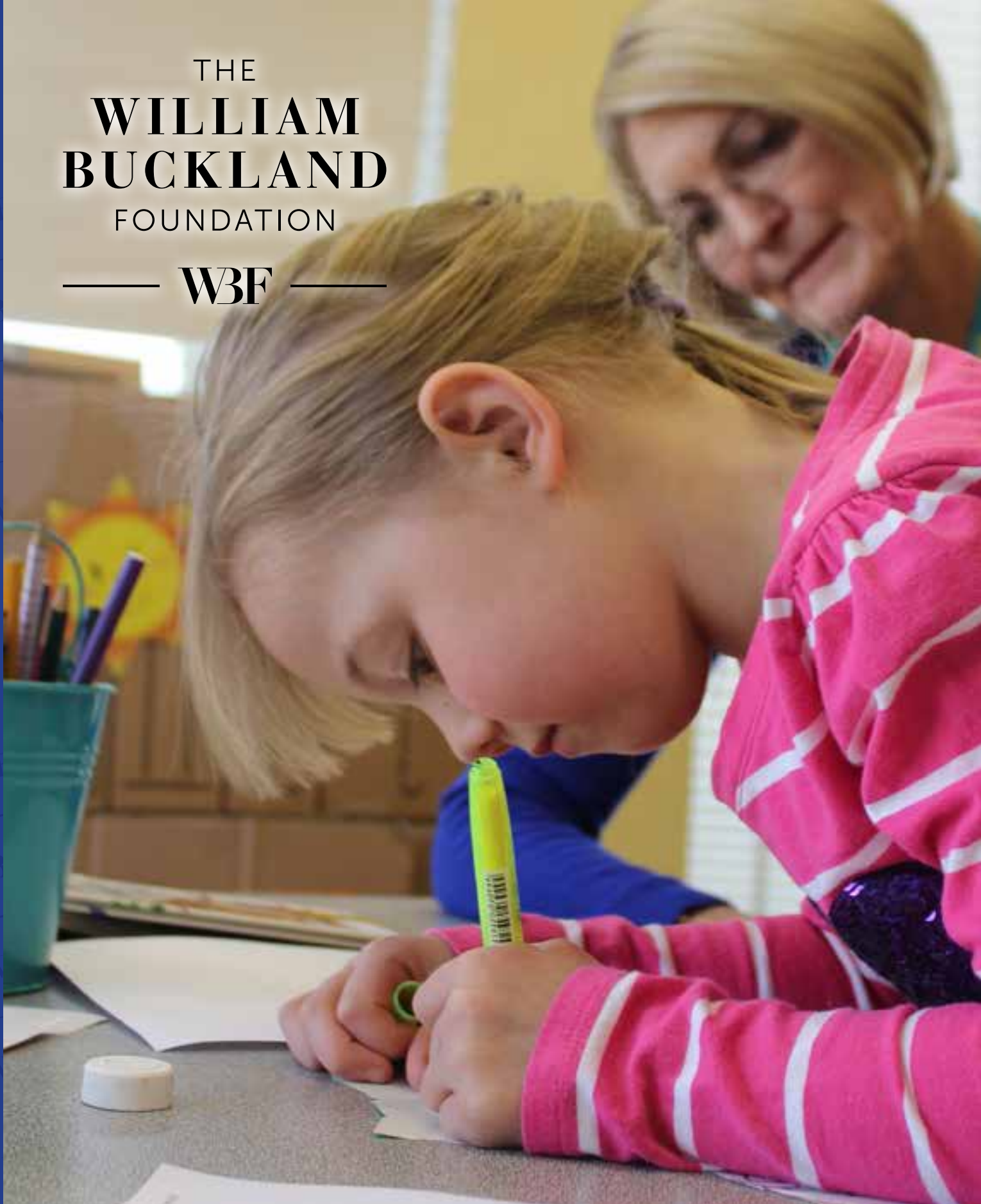


THE
**WILLIAM
BUCKLAND**
FOUNDATION

— **WBF** —



—
ANNUAL REPORT
2016

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Grants paid in 2015/2016:
\$7,061,392

Since its establishment in 1964,
The Foundation has distributed in excess of
\$100 million for Victorians.

The William Buckland Foundation aims to improve the lives of vulnerable Victorians through grants that support better housing, health, education and employment outcomes and initiatives that build resilience and strengthen rural & regional communities.





THE FOUNDER

The Foundation which bears his name commemorates William Buckland, a highly successful businessman and pastoralist in the middle years of the 20th century.

Initially involved in building the fledgling motor parts trade, his business interests expanded to include service stations, finance and investment companies and eventually a string of pastoral holdings in the eastern States and Northern Territory. He realised his great fortune by selling his private companies into public ones.

On his death in 1964, after bequests to his family and some favourite causes, William Buckland left the bulk of his large estate, £4 million, to establish a Foundation, the income of which was to be used in his words "to benefit a wonderful country and a wonderful people. Australia and Australians".

Those interested in learning more of him can obtain a copy of his biography, *William Lionel Buckland* by David T. Merrett from Equity Trustees or public libraries. The Will which established the foundation left half of the income "to divide... in each year among such public hospitals, public benevolent institutions or public benevolent societies in Victoria... and I hereby indicate to my Trustees my hope that in the division of such income, they will favourably consider charities for children". The other half he wished to apply to "public scientific or public educational purposes in Victoria".

His attachment to the pastoral sector is indicated in his suggestion that his Trustees, in administering the public educational purposes should "give preference to agricultural and related pursuits".

Today, with careful stewardship by The Foundation's Trustees, William Buckland's legacy generates in the order of \$6.5 million annually which is distributed for charitable purposes. From its establishment in 1964, The Foundation has distributed in excess of \$100 million.

As at 30 June 2016, the Foundation's corpus was valued at over \$117 million.



CHAIRMAN'S OVERVIEW

After an extensive review of our grant making, and ever mindful of the wishes of William Buckland, whose Foundation was established in 1964, the Trustees have initiated a new Granting Strategy. It does not so much represent a change in direction, but a tightening of the guidelines.

We are excited that, by adopting this new strategy, we will work towards achieving the best outcomes in the key focus areas: Housing and Employment, Health, Education and Agriculture (see pages 10 to 28)

It is very pleasing to report that the major Trusts and Foundations are working together more and more, sharing research, and often co-funding major projects. A number of our grants this year reflect this cooperation. Philanthropy Australia is also playing its part in bringing Trustees and Senior Executives together to discuss specific areas of common interest.

In July this year we said goodbye and thank you to Christine Unsworth who has been a Trustee for the past four years. Christine's advice, particularly in the area of children's health, has been invaluable and we will miss her.

Our new Trustee Jenny McGregor's career and experience, especially with Asialink, The Commission for the Future and Community Services Victoria, places her in a very good position to assess the needs and aspirations of our most vulnerable people.

The change in our granting strategy has resulted in, inevitably, more work for the Equity Trustees executives, who provide trustee, advisory, investment management, and secretarial services. We thank Natalie Elliott, Stuart McPhee and the rest of the team for their excellent work.

The hours spent on grant making, and the guidance given, by my fellow Trustees, Jane Gilmour, Graeme Sinclair, Tabitha Lovett representing Equity Trustees, and more recently Jenny McGregor, is inspiring. It is most enjoyable to be part of the team.

Sandy Clark

Chairman



Back Row (left to right): Natalie Elliott, Stuart McPhee, Tabitha Lovett
Front Row (left to right): Sandy Clark, Jane Gilmour, Graeme Sinclair, Jenny McGregor

TRUSTEES

The Trustees of The William Buckland Foundation are:

- Mr C.G. (Sandy) Clark (Chairman)
- Dr Jane Gilmour OAM
- Mr Graeme Sinclair
- Ms Christine Unsworth AM (to 13 July 2016)
- Ms Jennifer McGregor AM (from 13 July 2016)
- Equity Trustees (represented by Ms Tabitha Lovett)

MANAGEMENT

Equity Trustees provided trustee, advisory, investment management and secretariat services through the following staff members:

- Ms Natalie Elliott, Grant Program Manager
- Mr Stuart McPhee, Relationship Manager
- Mr Stephen Cleugh, Portfolio Manager
- Ms Emer O'Carroll and Ms Chloe Gill, Philanthropy Assistant

NEW GRANTING STRATEGY

The Terms of the Will of William Lionel Buckland that established the Foundation upon his death in 1964 direct that:

“...income derived there from upon the following trusts that is to say as to one half (50%) of such income to divide the same in each year among such public hospitals, public institutions or public benevolent societies in Victoria (being hospitals, institutions and societies which are in law charitable or the purposes of which are charitable) and in such proportions as my Trustees shall in each year determine and I hereby indicate to my Trustees my hope that in the division of such income they will favourably consider charities for children as for example children’s hospitals and orphanages and as to the other one half (50%) of such income to apply the same in each year to or for such public scientific or public educational purposes in Victoria which are in law charitable.”

“...in administering the public educational purposes to which portion of the income from my estate shall be applied as herein before I express the wish that my Trustees shall give preference to agricultural and related pursuits.”

The landscape of philanthropy, like most things, is constantly changing. The evolution of new approaches to grantmaking and the desire to understand the impact of the Foundation’s grant making have been at the forefront of the new granting strategy for the Trustees. The Foundation recognises that vulnerability and disadvantage are influenced by social and economic determinants including but not limited to, employment, housing, social support, education, health and wellbeing, geography and the environment.

The Foundation seeks to become more networked, engaged and informed in its efforts to understand and overcome the causes and contributing factors to social and economic disadvantage. After a process of reflection and in keeping with the wishes of William Lionel Buckland, the Trustees have determined that the Foundation will achieve the best impact with grantmaking and resources that are focused around four key focus areas.

Our support will be balanced between meeting the immediate and basic needs of the most disadvantaged and vulnerable in the community, and more strategic long-term investments in the following ways;

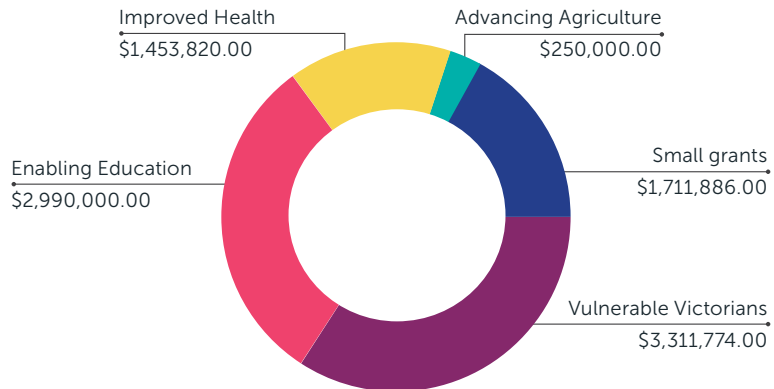
- Small Grants Partnership Programs
- Major Grants Program - calls for submissions
- Signature Grants – invitation only
- Collaborations – invitation only

Focus Areas:

In working towards achieving the best outcomes for the Foundation our grantmaking support will have the following key focus areas;

- Vulnerable Victorians – (Housing and Employment)
- Improved Health
- Enabling Education
- Advancing Agriculture

GRANTS APPROVED
2015/2016



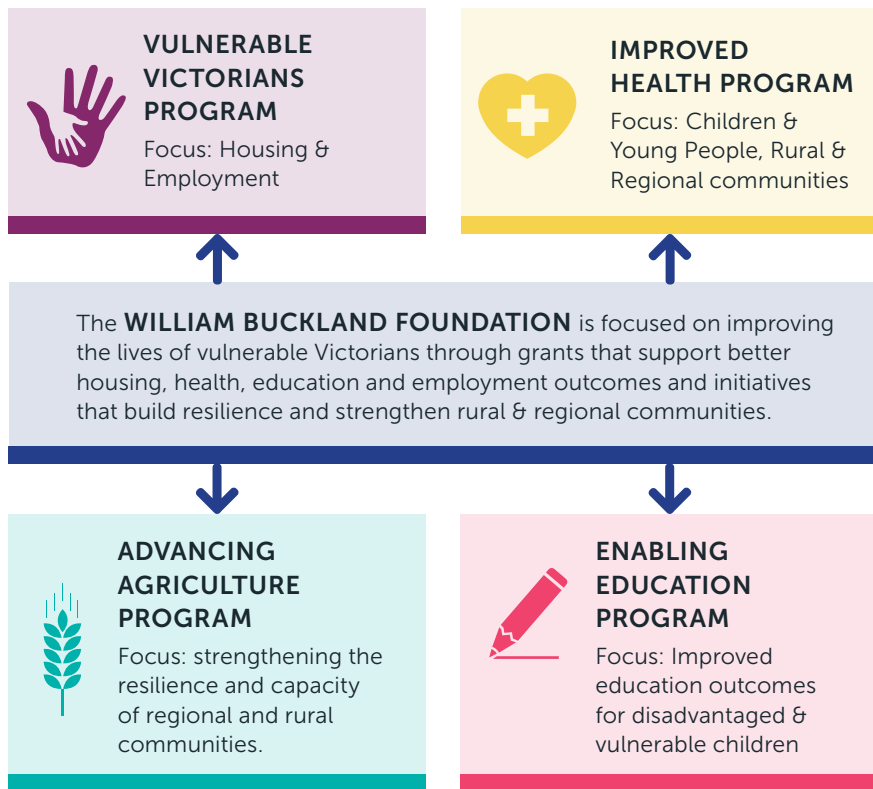
HOW WE WORK:

- Networked
- Informed
- Engaged

VALUE BEYOND GRANTS:

- Collaborate with other funders
- Drive Participation

STAY LONGER, ASSIST COMMUNITIES TO BECOME STRONGER



- COLLABORATIONS**
The Trustees select and invite organisations to develop and design Collaborations in partnership with the Foundation. It does not accept open requests under this strategy.
- SIGNATURE GRANT**
\$250K - \$750K – Moving towards catalytic leadership type grants
- OPEN LARGE GRANTS**
\$50k-\$150k per annum x 1-4 years
- SMALL GRANTS PARTNERSHIP PROGRAMS**
FRRR, Igniting Change and The Norman Wettenhall Foundation
- DIRECTOR GRANTS**
Small grants allocated at Director's discretions



VULNERABLE VICTORIANS PROGRAM

PROGRAM GOAL

Vulnerable Victorians have reasonably paid employment opportunities and safe and stable housing.



The Vulnerable Victorians Program supports funding proposals which focus on the *alleviation of disadvantage and poverty* for Victorians. For the next three to five years the Program is particularly focused on contributing to better housing and employment outcomes.

"Ever since we successfully rolled out Be The Hero for boys and young men, we have been yearning for an opportunity for a cut-through initiative that guarantees wider reach and deep cultural change around violence.

The William Buckland Foundation grant gives us our best shot at realising this vision. We kept asking ourselves - if we could choose one of the best avenues to ramp up the building of a culture of respect that reduced abuse and violence against women and girls, what would it be? Our answer? Australian sports. All codes. All clubs. All levels."

Mary Crooks AO, CEO
Victorian Women's Trust
Dugdale Trust for Women & Girls

DUGDALE TRUST FOR WOMEN & GIRLS: CLUB RESPECT

Deep cultural shift is needed to reduce violence. Sports clubs are uniquely placed to do so. Harnessing the experience, wisdom and expertise of many, Club Respect delivers a comprehensive set of guiding strategies and tools for clubs, including practical education, scrutiny and reform of all internal policies and procedures and matters of governance.

The embedding of respect as a strong and persistent value across all aspects of club administration will deliver intergenerational change on the issue of violence in our society.

The Buckland Foundation has been prepared to back people and the capability of organisational leaders to create solutions that seek to address complex problems. The Dugdale Trust is an organisation that is focused on a world where women and girls stand equally with men and boys, and take up all of life's opportunities without fear, harm, discrimination or disadvantage.



"The support of the William Buckland Foundation gives Mirabel a rare opportunity to explore and develop our future. This goes way beyond a financial strategy as it will influence the innovation, effectiveness and sustainability of our programs. It is an imperative step made possible due to the foresight and generosity of the William Buckland Foundation."

Jane Rowe, Founder & CEO
The Mirabel Foundation



**THE MIRABEL FOUNDATION
INC: LOOKING FORWARD
- EXPLORING STRUCTURES
AND MODELS FOR THE
FUTURE**

A priority outcome for this grant program is that vulnerable Victorians are connected to effective support networks and agencies. Mirabel is the only organisation in Australia specialising in, and uniquely focused on, the needs of children who have been orphaned or abandoned due to parental illicit drug use and their kinship carers.

This capacity building grant will help Mirabel develop a strategic plan to allow the organisation to cater for increased demand and continue to fulfil their mission for many years to come

HOMES FOR HOMES H4H PROGRAM

Homes for Homes is an innovative solution that raises new funds via tax deductible donations by Vendors of 0.1% of the sale price of their property at settlement. Homes for Homes raises these funds in a unique way, by lodging a 'permissive caveat' on the title.

The permissive caveat 'triggers' the vendor's offer to make a tax deductible donation to Homes for Homes at time of sale. Uniquely, the 'permissive caveat' remains with the title of the property facilitating donations by subsequent owners, so the property will continue to benefit disadvantaged Australians into the future.

Funds raised via Homes for Homes will help enable more social and affordable dwellings to be built in Australia.

"Homes for Homes is a sustainable, long-term solution that will benefit all Australians by giving future generations access to safe, secure and affordable accommodation. We strongly believe that solving our critical lack of social and affordable housing requires the entire Australian community to be part of the solution.

The William Buckland Foundation shares our view that a long-term visionary approach is required to tackle this enormous issue. We are delighted they will be joining us on our journey as a seed funding partner."

Steven Persson, CEO
Homes for Homes

GRANTS APPROVED 2015/2016

\$

Arts Centre Melbourne: Lord of the Flies – Youth Outreach & Community Participation Program	\$75,000
Dugdale Trust for Women & Girls: Club Respect (over 3 years)	\$364,000
Geelong Ethnic Communities Council trading as Diversitat: Rights to Work (over 3 years)	\$ 287,774
Homes for Homes Ltd: Homes for Homes (H4H) (over 3 years)	\$ 750,000
McAuley Community Services for Women: Coordination and Expansion of McAuley Children's Services	\$200,000
Permanent Care and Adoptive Families: Keeping Families Together - Supporting children and their families joined through permanent care and adoption in regional Victoria (over 3 years)	\$360,000
Social Traders Ltd: Social Enterprise Bridge Initiative (over 3 years)	\$450,000
The Mirabel Foundation: Looking Forward – Exploring Structures and Models for the Future	\$100,000
The Salvation Army Australia (Southern Territory): The Yarrinup Project (over 3 years)	\$300,000
Victorian Women's Housing Association trading as Women's Property Initiatives: Women's Property Initiatives Social Enterprise - Property Initiatives Real Estate	\$200,000
Worktrainers Ltd: Geared 4 Careers (over 3 years)	\$225,000

Total grants approved in the Vulnerable Victorians Program:

\$3,311,774



IMPROVED HEALTH PROGRAM

PROGRAM GOAL

Improved health of disadvantaged children and young people, especially those in rural and regional Victoria.



The Improved Health Program supports a range of initiatives which help produce better health outcomes for disadvantaged young Victorians. For the next three to five years the Program is particularly focused on improving health outcomes for children and young people in rural and regional Victoria who are at risk of or living with physical and mental illness.

As a relatively small community organisation our current capacity does not match our capabilities. Through a two-year capacity building grant, The William Buckland Foundation is supporting us during a period of significant change within the disability sector. Kids Plus Foundation is very purposeful about where we need to get to. The William Buckland Foundation is helping us get there.

Shaun Cannon, CEO
Kids Plus Foundation



KIDS PLUS FOUNDATION: ORGANISATIONAL CAPACITY BUILDING

Kids Plus provides an excellent service to children with a neurological disability and their families, from regional Victoria, and in particular the Barwon Region. Desk top research indicates the work has been internationally recognised as a 'best practice holistic service', this includes wrap around support from physiotherapists, occupational therapists and speech therapists to 90% of the 100 children supported at any time through intensive, 10 week blocks of support, then ongoing therapy support as required. This is pretty remarkable for an organisation of this size.

Support from the William Buckland Foundation will allow Kids Plus to invest in their own ability to maximise NDIS opportunities for sustainable growth and improve and expand its service offering to more children and families.



This allows us to realise a dream, of providing a range of children's services that enable families to get the help they need without having to know who they should see and where they can see them. It's about providing support early on – when a child is still little and can get the most benefit from allied health services – benefits that will last long after they've grown up.

Ronda Jacobs, CEO
Carrington Health

CARRINGTON HEALTH: THE PATCH

Primary care is often the first point of contact families have with the health system. Victoria's networks of community health services deliver a range of primary health, human services and community-based support to meet local community needs.

The PATCH is an innovative assessment and service delivery model for children aged 0-10 with health and developmental concerns. It aims to ensure vulnerable children and their families receive timely assessment and access to integrated support services to ensure they get the best start in life.

The community based clinic will be made up of an integrated team of allied health therapists with an initial assessment by a paediatrician. The clinic will offer a mix of treatment services, as well as assisting parents to navigate the health system and link in with other relevant support services.

EATING DISORDERS VICTORIA: PEER MENTORING PROGRAM FOR EATING DISORDERS PATIENTS LEAVING HOSPITAL

Eating disorders are a serious mental illness – not a lifestyle choice, a diet gone wrong or a fad. They are episodic in nature, meaning people often cycle through periods of wellness and illness.

Eating Disorders Victoria and the Austin Hospital will partner to develop, pilot and evaluate a peer mentoring program for people with eating disorders exiting hospital programs. This program will fill a service gap for people who require additional support to sustain recovery while living independently. It uses a peer support model, harnessing the experience of people who have recovered from eating disorders, with regular debriefing and supervision. This project will ensure eating disorders patients leaving hospital can better sustain their recovery outcomes in the long term.

This two-year grant from the William Buckland Foundation will enable EDV to work with clinical services to develop and pilot something that hasn't existed for people with eating disorders in the past.

The project will support us to build some important partnerships and provide an innovative program for our community. With this grant, we can explore, pilot and evaluate a concept we believe will result in really valuable outcomes.

Jennifer Beveridge, CEO
Eating Disorders Victoria

GRANTS APPROVED 2015/2016	\$
Carrington Health: Paediatric Assessment and Treatment at Carrington Health - the PATCH	\$150,000
Eating Disorders Foundation Of Victoria: Peer mentoring program for eating disorders patients leaving hospital (over 2 years)	\$200,000
Good Cycles Ltd: Bike Therapy (over 3 years)	\$150,000
Kids Plus Foundation: Kids Plus Foundation Organisational Capacity Building (over 2 years)	\$188,790
Penington Institute: Campaign to promote an ice support website for young people and their friends and families (over 2 years)	\$200,000
The Advisory Council For Children With Impaired Hearing (Vic) Taralye: developing three micro-centres and several regional hubs to provide seamless integration of services for children 0-12 years of age (over 3 years)	\$200,000
Yooralla: On the Move - State-wide Early Functional Mobility Service (over 3 years)	\$365,030
Total grants approved in the Improved Health Program:	\$1,453,820



ENABLING EDUCATION PROGRAM

PROGRAM GOAL

Victorian children and young people aged 0 – 25 years, especially those experiencing vulnerability or disadvantage, attain improved educational outcomes.



The Enabling Education Program supports initiatives which focus on the benefits of education and learning in a variety of ways.

How inspiring to be supported by the William Buckland Foundation, and the Trustees' vision for education and sustainable action for change. The Foundation understands that complex challenges in vulnerable communities cannot be 'solved' in a single year, and with multi-year support Kids Thrive can now deliver the Kids as Catalyst resilience and leadership program consistently over 3 years to young people in the Goldfields and Wyndham regions of Victoria, witnessing young people building their confidence, community connections, empathy and leadership capacity.

Local leaders now take these students seriously as young philanthropists and catalysts for local change, as young people who care about their communities and are prepared to act to lead local change.

Dr Andrea Lemon, CEO / Creative Director
Kids Thrive.

KIDS THRIVE: KIDS LEADING LOCAL CHANGE

The Kids as Catalyst resilience and leadership program empowers students in upper primary and lower secondary to learn the power of philanthropy and community action from a young age. Over two school terms students connect with their personal values, identify social issues or causes they are passionate about, locate local community groups who share these same concerns, and form action teams to develop a project to lead local change in their community.

With support from Kids Thrive and in partnership with local community groups, students lead the development of a community 'action', drawing on their time, talents and 'treasure' - small grants awarded to students by community leaders at a public pitching event. The Kids as Catalyst student/community partner action teams work together to implement their community initiatives, with many of those continuing for some years after the program itself has finished.

Kids as Catalyst teaches children and young people how to become philanthropists and activists for positive change right now in their young lives. It also sees them realising their own power and ability to affect real change within their communities.





We feel happy that our kids can live at MITS. We feel happy that our kids are getting a good education. We feel proud that our kids can be strong leaders for our community, now and in the future.

Priscilla, parent

MELBOURNE INDIGENOUS TRANSITION SCHOOL: VICTORIAN INDIGENOUS STUDENTS AT MITS

MITS provides an innovative approach to supporting some of Australia's most disadvantaged students. The founders of MITS developed the Year 7 transitional model in response to engagement with remote NT Indigenous families spanning several decades.

Year 7 students will undertake intensive academic learning for one year in a culturally-enriching, celebratory environment. Students will then move to scholarship positions in high-performing schools for the remainder of their school years. MITS will support and encourage cultural respect and inclusion at all Partner Schools.

Through this project partnership with the William Buckland Foundation, MITS will progressively expand its model to support Victorian students.

MITS empowers Indigenous students to access the best education in Australia, through a one-year transition program of accelerated learning and cultural celebration.

The William Buckland Foundation's support enables us to offer a growing number of positions each year to Victorian students. For us, this is critical: we must support local Indigenous people, whose country we share, and with whom – together – we will build Victoria's future.

Edward Tudor, Executive Director
MITS

TOMORROW TODAY FOUNDATION: EDUCATION BENALLA PROGRAM

In 2010 the Education Benalla Program began with a 20-year goal to raise the education and training completion rates of Benalla's 17-to-24 year olds to equal or above the Victorian average.

The key for success would be employing a 'whole-of-community' approach to social change. Data from the 2015 Australian Early Development Census indicates that the trajectory of childhood vulnerability has been slowed, and children are engaging in learning.

Following the completion of an initial three year commitment to the Education Benalla Program, The William Buckland Foundation committed in June a further \$600,000 over the next three years to ensure the sustainability of this important initiative for Benalla and its residents.



GRANTS APPROVED 2015/2016	\$
Centre for Multicultural Youth: Pathway to Opportunity (over 2 years)	\$150,000
Hands On Learning Australia: Increasing accessibility to Hands on Learning across Victoria (over 3 years)	\$575,000
Kids Thrive Inc: Kids leading Local Change (over 3 years)	\$210,000
Melbourne Indigenous Transition School: Victorian Indigenous Students at the Melbourne Indigenous Transition School (over 5 years)	\$600,000
Orchestra Victoria: Orchestra Victoria Regional Education (over 3 years)	\$255,000
Tomorrow Today Foundation: Education Benalla Project (over 3 years)	\$600,000
Zoe Support Australia: Great Expectations - assisting young mothers to complete education (over 3 years)	\$600,000
Total grants approved in the Enabling Education Program	\$2,990,000



ADVANCING AGRICULTURE PROGRAM

PROGRAM GOAL

Rural farming communities in Victoria are more resilient to adversity and change.



The Agriculture Program supports initiatives which focus on strengthening the resilience and capacity of regional and rural communities.

GRANTS APPROVED 2015/2016

\$

United Dairy Farmers of Victoria:
Supporting the wellbeing of Victorian
Farmers \$250,000

Total grants approved in the
Advancing Agriculture Program \$250,000

NUFFIELD AUSTRALIA: FARMING SCHOLARSHIPS

Nuffield Australia Farming Scholarships is a unique program that awards primary producers with a life-changing scholarship to travel overseas and study an agricultural topic of choice. Nuffield has been selecting primary producers for over 60 years and it is the leading program for primary producers in Australia.

Scholars are selected annually on merit as people who are committed and passionate about farming or fishing, are at the leading edge of technology uptake and potential future leaders in the industry. Nuffield Australia provides opportunities to Australian primary producers and managers between the ages of 28 and 40 to travel the globe investigating a research topic important to them and Australian agriculture.

The recipient of the 2016 Nuffield Scholarship supported by The William Buckland Foundation was Mr Jan Vydra, from Melbourne (pictured). He is currently investigating innovative ways to boost the yields and sustainability of fresh herb and salad leaf production.



We enjoy a strong collaborative partnership with the William Buckland Foundation to ensure the delivery of demonstrative outcomes by Nuffield Scholars, who have an impact in the agricultural industry.

The learnings and outcomes from Nuffield Scholars are disseminated throughout the rural community in Victoria, with Scholars relaying the latest information about new technology, techniques and innovations to support Australian agriculture.

The William Buckland Foundation provides support for Nuffield Scholars who travel overseas on a research study topic related to the Victorian agricultural industry.

Jodie Dean, CEO
Nuffield Australia

THE UNIVERSITY OF MELBOURNE: FACULTY OF VETERINARY AND AGRICULTURAL SCIENCES - THE WILLIAM BUCKLAND RESIDENTIAL SCHOLARSHIP PROGRAM

Established in 2014, The William Buckland Foundation Residential Scholarship Program seeks to assist students from rural and regional Victoria to access higher education to complete studies in Agriculture and Land Management. The William Buckland Foundation Residential Scholarship Program builds on Mr. Buckland's desire to assist 'Australia and Australians' in 'agricultural pursuits'. This substantial scholarship aims to assist students from regional and rural areas with their accommodation during their three years of study.

The first two recipients of the Scholarship Program are James Taylor and Sam Neilsen.

THE VALUE OF LONG TERM SUPPORT

Permanent Care and Adoptive Families (PCA Families)

Permanent Care and Adoptive Families (PCA Families) was established in 2003 by a group of passionate and dedicated volunteers who sought to support parents and carers in nurturing the children who had come into their families through adoption or home-based care.

With tears in my eyes; I cannot express my thanks enough for what you have given my grandchild and I. I am so overwhelmed with thanks that I am truly having trouble putting this letter together. To tell you the truth, the past 11 years have been a struggle, and for someone to reach out to us and give us a hand...I am totally lost for words.

*From the bottom of my heart, and with tears running down my face – from my grandchild and me, a huge
THANK YOU.*

(PCA Families' carer 2016)

In 2010, the ANZ Trustees (now Equity Trustees) together with the William Buckland Foundation, Collie Foundation, and Truby and Florence Williams Charitable Trust, and the Felton Bequests' Committee (founding funders) provided \$1.8m to PCA Families to support the capacity of the organisation to establish a Post Placement Support Centre and expand its capacity to provide support services across the state.

These funds were used by PCA Families to develop a five year strategic plan, with a vision to develop strong early intervention services to support families formed through permanent care, adoption, and kinship care. A number of services were developed, delivered, and evaluated over a two year period via Action Research. This evaluation assisted the PCA Families' Board in strengthening its strategic direction and shaping its governance arrangements and services. Since then, PCA Families has developed strong support services and cross sector partnerships.

In June 2016, the William Buckland Foundation approved a new grant of \$360,000 over three years to PCA Families for their Keeping Families Together project, which supports children and their families joined through permanent care and adoption in regional Victoria.

What we look like today reflects upon our founding funders and their willingness to have faith in a small organisation undertaking a huge task. Thanks to their seed funding, we have been able to develop our Information, Advocacy and Support Service; Peer Support Services; and Education and Training Services.

We have been able to evidence base the needs of our families, the need for government funding, and the need to listen to the voices of parents and carers in country and regional Victoria. This exciting new grant of \$360K from the Buckland Foundation will enable us to achieve better outcomes for children and families from permanent care, adoption and kinship care in country and regional Victoria. We can't wait to start.

Brenda Carmen, CEO
PCA Families



SMALL GRANTS PARTNERSHIP PROGRAMS

The Foundation has supported over 100 small grants to small community projects in 2016 with our partner Organisations.

We have selected organisations to develop and design a Small Grants Program in partnership with the Foundation. The partnerships provide an opportunity to work with respected organisations that have particular expertise to find critical small-scale grass roots projects, or support work in a specialised focus area for the Foundation. The partnerships are closely managed by the Foundation and are designed and developed to achieve positive community impact in the Foundation's focus areas and achieve greater reach to communities and audiences it may not normally have reached.

IGNITING CHANGE

\$150,000 per annum



Igniting Change works hard, and is particularly good at unlocking resources for often unmet social needs. They pro-actively create new initiatives by connecting business with communities and striking relationships between people who would not usually meet. They often illuminate pressing issues of the day that might otherwise remain hidden. By enabling a broad network of people to come face to face with issues of disadvantage, they have encouraged people to get involved and make a difference.

A great example is the Twitch Women's Collective that creates and sells traditional African hand-made clothing mixed with modern day fashion. The group offers Certificate III in Clothing Production which is delivered in partnership with RMIT.

FOUNDATION FOR RURAL & REGIONAL RENEWAL (FRRR)

\$450,000 over 3 years

Partnerships with long term donors, like William Buckland Foundation who have worked with us on Small Grants for Rural Communities for the last fifteen years, are critical to FRRR being able to support local rural leaders in implementing the projects that they know will make the biggest difference.

And they really do make a difference – even something as simple as a new playground opens up all sorts of possibilities.

For example, Corryong Neighbourhood House used a grant to build an active, inclusive, and safe Adventure Playground.

Natalie Egleton, CEO
Foundation for Rural & Regional Renewal (FRRR)



NORMAN WETTENHALL FOUNDATION

\$330,000 over 3 years

WBF is now working with our Small Environmental Grants program and providing \$100,000 worth of small grants annually for landscape restoration and education. Grants so far have gone to initiatives focusing on land managers working with community groups to improve conservation outcomes for native plants and animals, eg farmers and landholders improving habitat for threatened bird species like Bush Stone Curlew and Plains Wanderers.

Beth Mellick, Executive Director
The Norman Wettenhall Foundation



SMALL GRANTS

In addition to the partnership programs with FRRR, The Norman Wettenhall Foundation and Igniting Change, the Foundation made a number of single grants to smaller organisations undertaking worthwhile projects in the community.

SMALL GRANTS APPROVED 2015/2016	\$
Autism Behavioural Intervention Association: ABA On-Line	\$26,565
Bass Coast Health: Bass Coast Youth Assist Clinic	\$10,000
Cerebral Palsy Support Network: Camp SHARP	\$34,170
Cottage By The Sea Queenscliff: A 4 days Take A Break Camp for 20 disadvantaged children from Victoria	\$8,794
Entertainment Assist: Intermission - Mental Health Support and Prevention Training	\$29,903
Fitzroy Adventure Playground Inc: Cubbies Masterplan	\$30,000
Foundation For Rural & Regional Renewal: Back to School Project (over 3 years)	\$90,000
Homeless of Melbourne (by Conscious Creative Inc): HoMie - The Street Store that Gives	\$22,000
Kids Under Cover: Kids Under Cover - Studio to prevent youth homeless	\$10,000
Melbourne Prize Trust: Development Award 2016 as part of the Melbourne Prize for Music 2016	\$10,000
Muscular Dystrophy Australia: CampMDA 2016	\$9,250
Operation Stitches: Stitches Buddies Program	\$15,072
River Nile Learning Centre: Expansion of RNLC Childcare	\$16,000
Social Ventures Australia Ltd: Mapping the Social Enterprise Sector	\$5,000
Solve Disability Solutions: Development of Working Partnerships with Mens Shed	\$30,000
Southern Cross Kids' Camps: Kids for Boundless Futures	\$24,000
Spina Bifida Foundation of Victoria: Spina Bifida Annual Family Camp	\$28,732
The Trustee For The Queen's Fund: Education, Training and Equipment for at least 107 Single Women or Their Children in Victoria	\$30,000
Urban Seed (Collins Street Baptist Benevolent Society Inc): Norlane Community Development Spin Off project	\$30,000
West Welcome Wagon: Welcome to the West	\$10,000
Westside Circus: Altitude	\$30,000
Youth Leadership Victoria: Healthy Eating Healthy Kids	\$12,400
Total grants approved in our Small Grants Program	\$ 511,886

FINANCIAL REPORT

Investment Overview

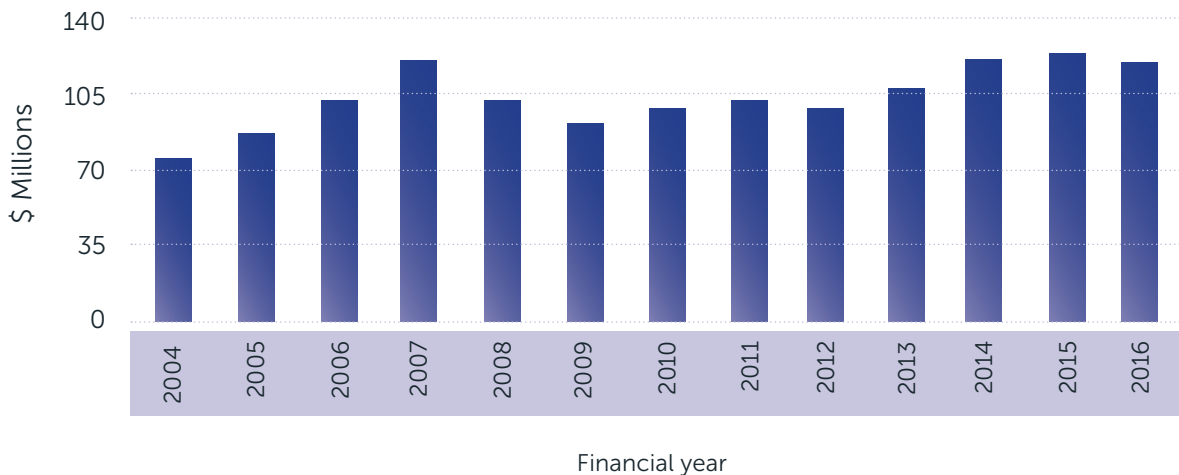
The Trustees consider that, as The Foundation is a perpetual trust, the amount available for distribution to charities will be maximised over time if a relatively high proportion of the corpus is invested in growth assets, particularly equities.

Capital Value

The net assets of The Foundation as at 30 June 2016 were \$117,223,504 (2015 \$126,507,410)

THE FOUNDATION'S CAPITAL VALUE

Capital Value 



Investment Management

It is considered prudent to entrust day-to-day management of the funds to professional investment managers, within asset allocation ranges set by the Trustees. The investment managers for the financial year ended 30 June 2016 were:

- Equity Trustees Limited
- Nikko Asset Management
- Warakirri Asset Management Pty Ltd

Net Income

The portfolio, which has an income bias, generated a net income available for distribution for the year of \$6.0 million (2015 \$7.1 million). The decline in revenue for the year was due to a reduction in dividends and trust distributions and the inclusion in the previous year's income of \$0.6 million of distributed capital gains from one of the managed funds. The reduction in revenue more than offset the small reduction in operating expenses.

Management Expense Ratio

The Management Expense Ratio (MER) is a measure of the level of expenses incurred by The Foundation. The MER, expressed as a percentage of the net assets of The Foundation, includes the administration fees, investment management fees and other expenses. The MER for the year was 1.10% (2015 1.07%)

CONCISE FINANCIAL REPORT 2015 – 2016

Statement of income available for granting for the year ended 30 June 2016

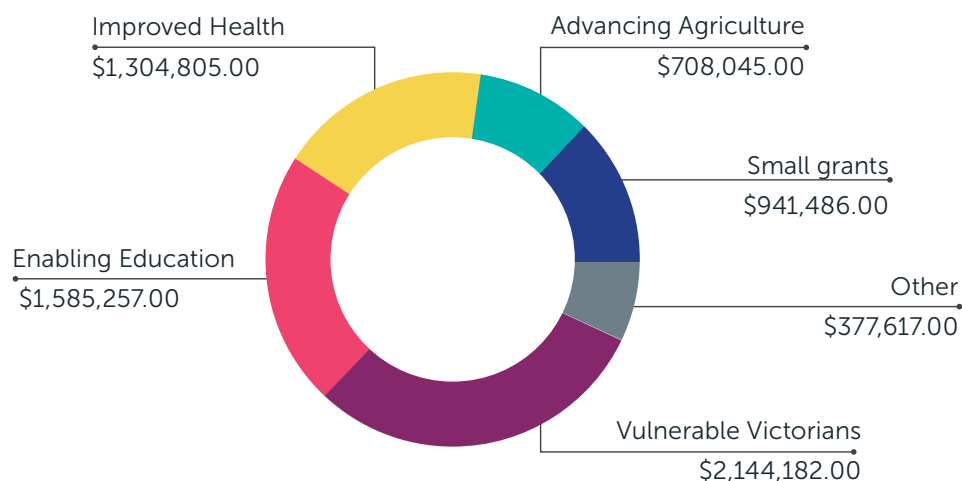
	2016 \$	2015 \$
Revenue		
Interest	112,963	117,252
Estate distributions	34,809	69,556
Dividends	1,920,683	2,542,212
Managed investment distributions	2,924,165	4,429,541
Imputation credits	1,752,714	2,495,162
Management fee rebate	166,438	159,257
Total Revenue	6,911,722	9,812,980
Expenses		
Equity Trustees Limited fees	542,881	546,358
Co Trustees' fees	4,000	4,000
Investment management and custodian fees	240,154	271,027
Audit fees	7,535	7,210
Other expenses	14,904	22,395
Total Expenses	809,474	850,990
Net Income for the Year Before Grants Paid	6,102,298	8,961,990
Less Transfer Capital Components	(130,269)	(1,864,789)
Net Income available for granting	5,972,029	7,097,201
Grants Paid	7,061,392	5,862,738
Net Income for the Year	(1,089,363)	1,234,463
Retained Earnings at 1 July	8,662,767	7,428,304
Retained Earnings at 30 June	7,573,404	8,662,767

Statement of Financial Position

As at 30 June 2016

	2016 \$	2015 \$
Current Assets		
Cash and cash equivalents	5,079,122	5,305,803
Receivables	2,748,602	4,155,765
Due from brokers – receivable for securities sold	114,243	-
Total Current Assets	<u>7,941,967</u>	<u>9,461,568</u>
Non-current Assets		
Financial Assets	109,604,732	117,275,031
Total Non-Current Assets	<u>109,604,732</u>	<u>117,275,031</u>
Total Assets	<u>117,546,699</u>	<u>126,736,599</u>
Current Liabilities		
Payables	221,421	229,189
Due to brokers – receivable for securities purchased	101,774	-
Total Current Liabilities	<u>323,195</u>	<u>229,189</u>
Total Liabilities	<u>323,195</u>	<u>229,189</u>
Net Assets	<u>117,223,504</u>	<u>126,507,410</u>
Represented by:		
Retained earnings	7,573,404	8,662,767
Capital funds	109,650,100	117,844,643
Total Trust Funds	<u>117,223,504</u>	<u>126,507,410</u>

Grants paid July 2015 – June 2016



GRANTS PAID

\$

Andrew Dean Fildes Foundation : Sustainability & succession planning for The Andrew Dean Fildes Foundation	\$30,000
Arts Centre Melbourne : Lord of the Flies – Youth Outreach & Community Participation Program	\$75,000
Australian Rural Leadership Foundation : Australian Rural Leadership Program Scholarships for Victorians	\$53,045
Autism Behavioural Intervention Association : ABA On-Line	\$26,565
Brotherhood of St Laurence : Brotherhood of St Laurence Goodstart Family Centre - Community Impact Leader	\$50,000
Carringbush Adult Education : Community Liaison Officer for women's empowerment	\$9,600
Carrington Health : Paediatric Assessment and Treatment at Carrington Health – the PATCH	\$150,000
Castlemaine District Community Health : Learning To Live - A Project of Wellbeing Mount Alexander	\$148,344
Centre for Multicultural Youth : Pathway to Opportunity	\$75,000
Cerebral Palsy Support Network : Camp SHARP	\$34,170
Children's Protection Society : Extending the reach of The Early Years Education Program (EYEP) for vulnerable children	\$50,000

GRANTS PAID	\$
Combined Churches Caring Melton Inc : COACH (Creating Opportunities and Casting Hope) community mentoring	\$40,000
Cottage By The Sea Queenscliff : A 4 Day Take A Break Camp for 20 disadvantaged children from Victoria	\$8,794
Cultivating Community Inc : Dandenong Urban Farm and Education Centre	\$50,000
Doveton College : Doveton Live	\$160,000
Dugdale Trust for Women & Girls : Club Respect	\$134,500
Earthwatch Institute : Leading conservation through citizen science in Victoria	\$60,000
Eating Disorders Foundation of Victoria : Back To Ed Basics - GP & Health Practitioner eating disorders education program	\$94,500
Peer mentoring program for eating disorders patients leaving hospital	\$100,000
Entertainment Assist : Intermission - Mental Health Support and Prevention Training	\$29,903
Fitted For Work Limited : Connecting mature age women with work	\$96,917
Fitzroy Adventure Playground Inc : Cubbies Masterplan	\$30,000
Foundation For Rural & Regional Renewal : Back to School Project	\$30,000
Fast Tracking Innovation Project	\$244,000
Small Grants For Small Rural Communities Program (Vic)	\$150,000
Geelong Ethnic Communities Council trading as Diversitat : Rights to Work	\$99,682
Good Beginnings Australia : Pairs (Parent & Infant Relationship Support) -infant mental health pilot program	\$113,625
Good Cycles Ltd : Bike Therapy	\$75,000
Good Shepherd Youth & Family Service : Firmer Foundations	\$94,000
Griefline Family and Community Services Inc : Building the capacity and sustainability of Griefline Family Community Services	\$71,700
Haileybury Foundation : William Buckland Foundation and Haileybury Scholarship Fund - Scholarships for Indigenous students	\$25,000

GRANTS PAID	\$
Hands On Learning Australia : Increasing accessibility to Hands on Learning across Victoria	\$197,500
Homeless of Melbourne (by Conscious Creative Inc) : HoMie - The Street Store that Gives	\$22,000
Homes for Homes Ltd : Homes for Homes (H4H)	\$350,000
Igniting Change Foundation : Changing Lives Small Grants Partnership	\$150,000
Insight Education Centre : Design & delivery of pilot Insightout Mobile Education Programs - Western Suburbs	\$75,000
Kids Plus Foundation : Kids Plus Foundation Organisational Capacity Building	\$93,000
Kids Thrive Inc : Kids Leading Local Change	\$70,000
Kids Under Cover : Kids Under Cover – studio to prevent youth homelessness	\$10,000
Loddon Mallee Housing Services : The Sidney Myer Haven Program	\$250,000
Make a Difference Dingley Village Inc : Strength in knowledge and information	\$20,000
Mawarra Centre Inc : Grant for rural enterprises	\$20,000
McAuley Community Services for Women : Coordination and Expansion of McAuley Children’s Services	\$200,000
Melbourne Indigenous Transition School : Victorian Indigenous Students at the Melbourne Indigenous Transition School	\$40,000
Melbourne Prize Trust : Development Award 2016 as part of the Melbourne Prize for Music 2016	\$10,000
Melbourne Recital Centre : Share More Music - a music education & accessibility program	\$120,000
Mental Health Legal Centre : Capacity-building	\$120,000
Muscular Dystrophy Australia : CampMDA 2016	\$9,250
Nuffield Australia : Nuffield Australia Farming Scholarship for a Victorian farmer - 2016 to 2018	\$51,000
Operation Stitches : Stitches Buddies Program	\$15,072
Orchestra Victoria : Orchestra Victoria Regional Education	\$100,000

GRANTS PAID	\$
Penington Institute : Campaign to promote an ice support website for young people and their friends and families	\$100,000
Permanent Care and Adoptive Families : Keeping Families Together - Supporting children and their families joined through permanent care and adoption in regional Victoria	\$120,000
Public Interest Law Clearing House : Pilchconnect - Reaching the hard to reach	\$85,000
River Nile Learning Centre : Expansion of RNLC Childcare	\$16,000
Royal Melbourne Hospital : Lynly Aitken Travelling Scholarship	\$10,000
Social Ventures Australia Ltd : Mapping the Social Enterprise Sector	\$5,000
Social Traders Ltd : Social Enterprise Bridge Initiative	\$150,000
Solve Disability Solutions : Development of Working Partnerships with Mens Shed	\$30,000
Southern Cross Kids' Camps : Kids for Boundless Futures	\$24,000
Spina Bifida Foundation of Victoria : Spina Bifida Annual Family Camp	\$28,732
St John Ambulance Australia (Victoria) : Volunteer recruitment and training project	\$12,085
St Vincent's Hospital Melbourne : Social Firms Australia - Employ Your Mind	\$120,000
St Kilda Gatehouse : Young Women's Project Dandenong	\$120,000
The Advisory Council for Children with Impaired Hearing (Vic) Taralye : Developing three micro-centres and several regional hubs to provide seamless integration of services for children 0-12 years of age	\$100,000
The Mirabel Foundation : Looking Forward – Exploring Structures and Models for the Future	\$100,000
The Norman Wettenhall Foundation : Landscape Restoration Partnership Program	\$110,000
The Salvation Army Australia (Southern Territory) : The Yarrinup Project	\$100,000
The Social Studio : Social Change Through Design	\$40,000
The Trustee for the Queen's Fund : Education, Training and Equipment for at least 107 Single Women or Their Children in Victoria	\$30,000

GRANTS PAID	\$
The University of Melbourne : Faculty of Veterinary and Agricultural Sciences - The William Buckland Residential Scholarship Program	\$60,000
The University of Melbourne : The Australian Mathematical Sciences Institute - The Improving Mathematics Education in Schools project	\$132,757
Tomorrow Today Foundation : Education Benalla Program	\$200,000
United Dairy Farmers of Victoria : Supporting the wellbeing of Victorian Dairy Farmers	\$250,000
Urban Seed (Collins Street Baptist Benevolent Society Inc) : Norlane Community Development Spin Off project	\$30,000
Vicseg New Futures : Refugee student engagement and support project	\$100,000
Victorian Medical Research & Technology Program	\$22,085
Victorian Women's Housing Association trading as Women's Property Initiatives : Women's Property Initiatives Social Enterprise - Property Initiatives Real Estate	\$200,000
West Welcome Wagon : Welcome to the West	\$10,000
Westside Circus : Altitude	\$30,000
Worktrainers Ltd : Geared 4 Careers	\$75,000
Yooralla : On the Move – State-wide early functional mobility service	\$166,166
Youth Leadership Victoria : Healthy Eating Healthy Kids	\$12,400
Zoe Support Australia : Great Expectations - assisting young mothers to complete education	\$140,000
Total grants paid in the 2015-16 financial year:	\$7,061,392

THE
**WILLIAM
BUCKLAND**
FOUNDATION

— WBF —

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