



THE  
**WILLIAM BUCKLAND**  
FOUNDATION

— **WBF** —



**ANNUAL REPORT**  
2018

THE  
**WILLIAM BUCKLAND**  
FOUNDATION

————— **WBF** —————



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# WBF

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

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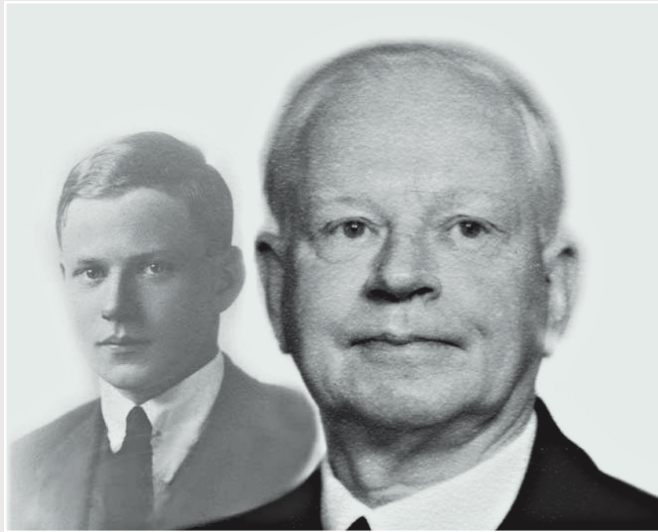


# Grants Paid in 2017/2018: **\$6,905,759**

Since its establishment in 1964,  
the Foundation has distributed more  
than of \$112 million for Victorians.



# 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.

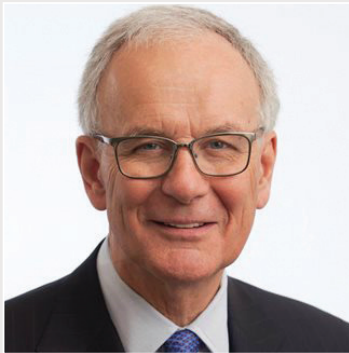
On his death in 1964, after bequests to his family and some favourite causes, William Buckland left the bulk of his large estate, £4 million, to establish a Foundation, the income of which was to be used in his words “to benefit a wonderful country and a wonderful people, Australia and Australians”. 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 \$112 million. As at 30 June 2018, the Foundation’s corpus was valued at over \$128 million.

# Chairman's Overview



Our four funding areas, Vulnerable Victorians, Improved Health, Enabling Education and Advancing Agriculture give the Trustees enormous scope to implement our granting strategy. But as I have contended many times, in practice it is often easier to make money than to give it away in a considered, responsible, and effective way, honouring the Will of our founder William Buckland.

There is also the need to differentiate between the quick fix, where there is immediate need, and other projects, requiring longer gestation, often where the funding is spread over many years. For example in education we are continuing to support Our Place, an initiative of Julius Colman, which works with local schools in our most disadvantaged communities to expand the opportunities offered to children and families. These long term projects may be contrasted with a grant we made recently to the Corryong Neighbourhood Centre for the Walwa Mechanics Project, to support a specific enterprise in a remote town of rural Victoria. This builds on a successful strategy of increasing sustainable social enterprises, such as the establishment of a bakery, in nearby Corryong.

Changes are also afoot among the Buckland Trustees. In July, Graeme Sinclair, who joined our Board in 2009, decided to retire. Graeme's contribution has been immense, given his analytical and accounting skills and his desire to make a difference, as seen by his championing of organisations such as Habitat for Humanity.

We are fortunate that Ross Barker, a Non-Executive Director of three Listed Investment Companies and Chairman of the Melbourne Business School, has joined the Board in Graeme's place.

At the end of this year, I will retire, after some eighteen years on the Board. Again, I am very pleased that David Williamson, Deputy Chairman of Flagstaff Partners, Chairman of SecondBite, a Trustee of the Scobie & Claire Mackinnon Trust, and recently retired Chairman of the Corporate & Philanthropic Committee of the Salvation Army, has agreed to join us.

Jane Gilmour will succeed me as Chairman and I know she will be given the same, extraordinary, level of support I have experienced.

My fellow Trustees, Jane Gilmour, Jenny McGregor, Graeme Sinclair and Jodi Kennedy, representing Equity Trustees, have shown unfailing commitment and good humour over the past year. We have been ably supported by the Equity Trustees team, Ferdi Hepworth, Nicole Engelman, Stuart McPhee, Stephen Cleugh and Chloe Gill.

To have led the Foundation for "too long" has been a humbling, but rewarding experience, made possible by a dedicated group of people proud to honour the memory, and interpret the Will, of William Buckland. Undoubtedly they have "the milk of human kindness by the quart in every vein".

Sandy Clark  
Chairman

# Trustees

The Trustees of The William Buckland Foundation are:

- Mr C.G. (Sandy) Clark (Chairman)
- Dr Jane Gilmour OAM
- Mr Graeme Sinclair (retired July 2018)
- Ms Jennifer McGregor AM
- Mr Ross Barker (from July 2018)
- Equity Trustees (represented by Mr Ian Westley until December 2017 and Ms Jodi Kennedy from February 2018)



*Back row (left to right): Jodi Kennedy, Jeff Sitters, Nicole Engelman, Ferdi Hepworth, Ross Barker  
Front row (left to right): Jenny McGregor, Sandy Clark, Jane Gilmour, Graeme Sinclair*

# Management

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

- Ms Ferdi Hepworth, Grant Program Manager
- Mr Jeff Sitters, Relationship Manager
- Ms Nicole Engelman, Grant Program Manager
- Mr Stuart McPhee, Relationship Manager
- Mr Stephen Cleugh, Portfolio Manager
- Ms Chloe Gill, Philanthropy Assistant





# Granting Strategy

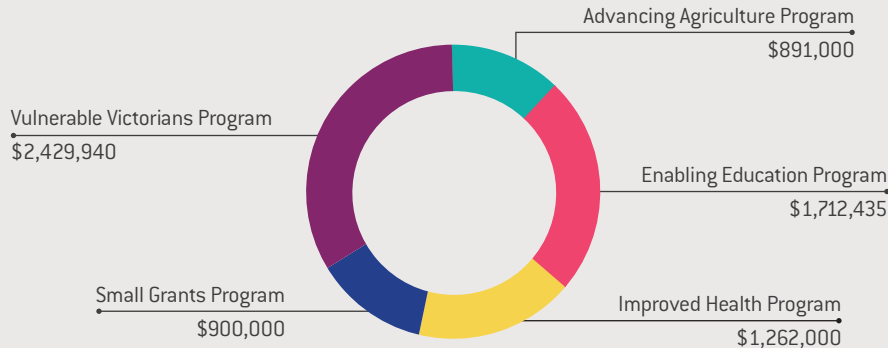
The wishes of William Buckland underpin our strategy as the Foundation continues to adapt our practices, thinking and approach. The Foundation is now two years into our five-year strategy, which targets our efforts across four areas;

- Connecting and strengthening regional and rural communities
- Improving educational outcomes for disadvantaged and vulnerable children
- Supporting vulnerable Victorians into appropriate employment and safe and secure housing
- Improving health outcomes for young people in rural and regional communities.

We work to deepen our understanding, engage with our grantees and collaborate with other philanthropic funders to overcome the causes of social and economic disadvantage. We continue to focus our grant making on innovative solutions to complex problems and to amplify the reach of these projects where appropriate.

Our support continues to be balanced between meeting the immediate and basic needs of the most disadvantaged and vulnerable in our community, and more strategic, long-term investments.

# Grants Approved 2017/2018



**TOTAL: \$7,195,375**

## How we work

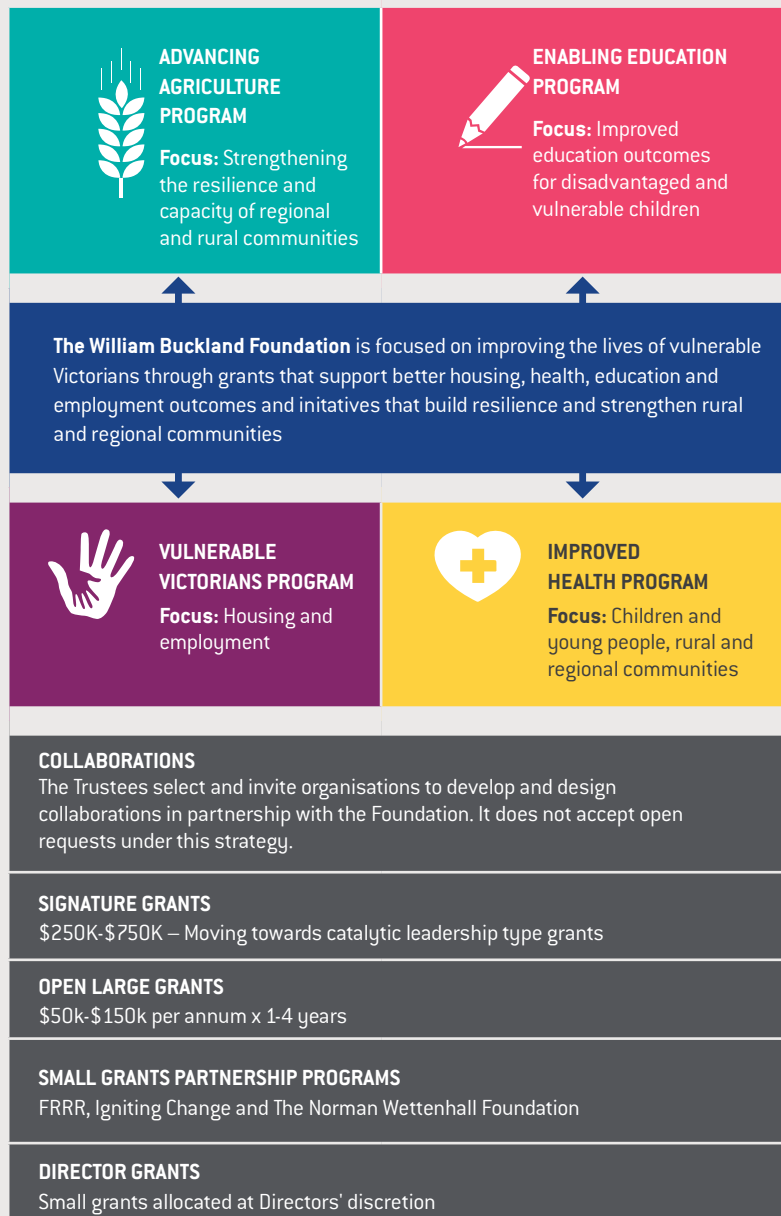
- ▶ Networked
- ▶ Informed
- ▶ Engaged

## Value beyond grants

- ▶ Collaborate with other funders
- ▶ Drive participation

## Stay longer

## Assist communities to become stronger





# Advancing Agriculture Program

## **PROGRAM GOAL**

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

### **Total grants paid in 2017/2018**

\$267,500

### **Total new grants approved in 2017/2018**

\$891,000

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

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## Farmers for Climate Action

### Victorian Climate-Smart Agriculture Fellowship

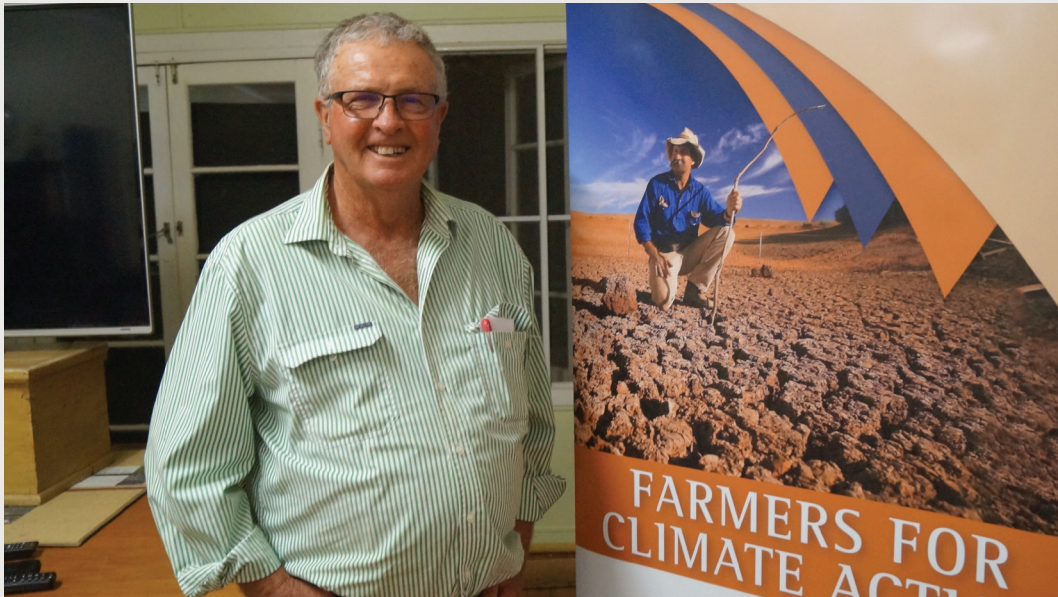
This year's drought has served to highlight Australia's vulnerability to the warming effects of climate change. Against this background, Farmers for Climate Action – an independent, non-partisan, non-profit association of farmers and agriculture leaders – has committed to helping our country tackle this globally pressing challenge. Among its goals are increasing the resilience of farmers and farming communities; further reducing greenhouse emissions; securing Government support for climate adaptation for primary production; exploring potential synergies between the farming and renewable energy industries; and advocating for more funding for research, development and extension for climate-smart agriculture.

The Victorian Climate-Smart Agriculture Fellowship will help Victorian farmers address the challenges

arising from our rapidly changing climate, such as increased rainfall variability and the spread of introduced pest flora and fauna. By training and supporting 30–50 farmers and agricultural sector leaders over the next two years, the fellowship will foster a better understanding of climate risks and solutions related to energy and land use, and how to incorporate climate mitigation and climate adaptation when planning for the future. It will also help the sector create and seize opportunities arising from climate change solutions, such as increased productivity and profitability from land and soil carbon initiatives and reduced input costs resulting from on-farm renewable energy systems.

**Date of grant:** August 2017

**Amount:** \$176,000 over three years



Beef farmer and award-winning climate communicator Sid Plant shares his expertise with fellow farmers at an on-farm Farmers for Climate Action Climate-Smart Agriculture event.

*“Our organisation can address these challenges because we are the only organisation in Australia focused solely on the intersection of agriculture and climate change. We have experience in working at both a grassroots level with primary producers and effectively engaging with key industry stakeholders. We appreciate the support of the William Buckland Foundation in assisting us to drive increased resilience across rural and regional Victoria.”*

Ms Verity Morgan-Schmidt, CEO Farmers for Climate Action



## Birchip Cropping Group

### BCG Community Network: Solving the Big Issues in Agriculture

The Birchip Cropping Group (BCG) was formed by a group of farmers 25 years ago to rectify a lack of research relevant to local communities. Today, BCG has over 400 farm business members and is nationally renowned for conducting high-

The newly-formed BCG Community Network will be comprised of multi-disciplinary representatives of the 57,000 people in the Wimmera and Mallee regions. Over the next three years, this team will address the complex challenges and opportunities

*“With the William Buckland Foundation’s generous support, we’ll be working closely with our local rural communities and growers to identify the key agricultural issues they face, unpack the complexities and develop innovative solutions that increase their capability to respond and adapt. Although we’ll be focussing on local needs and opportunities, the idea is also to produce a model that could be replicated across Australia.”*

**Mr Chris Sounness, CEO Birchip Cropping Group**

quality research that is successfully adapted and implemented by farmers to improve their farming practices. The BCG’s Board, staff, advisory committees and collaborators are all committed to achieving a single mission: “to improve the prosperity of Australia’s broadacre farmers through applied, science-based research and extension”.

faced by the regions approximately 400 farm businesses and rural communities.

**Date of grant:** August 2017

**Amount:** \$348,000 over three years

#### ADVANCING AGRICULTURE PROGRAM GRANTS APPROVED 2017/2018

- **Birchip Cropping Group:**  
BCG Community Network - Solving the big issues in Agriculture  
**\$348,000**
- **Farmers for Climate Action:**  
Victorian Climate-Smart Agricultural Fellowship  
**\$176,000**

- **Nuffield Australia Farming Scholars:**  
Nuffield Scholarships 2018 – 2021  
**\$367,000**

**TOTAL GRANTS APPROVED IN THE ADVANCING AGRICULTURE PROGRAM:**  
**\$891,000**





# Enabling Education Program

## PROGRAM GOAL

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

### **Total grants paid in 2017/2018**

\$2,942,105

### **Total new grants approved in 2017/2018**

\$1,712,435

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

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## North Central Local Learning and Employment Network Inc

### Strong Families, Strong Children, Loddon Shire

The North Central Local Learning and Employment Network (NCLLEN) is an independent incorporated body with a community-led Board. Since 2004 it has been supporting partnerships and planning programs and services for children and young people in the rural local government areas of Loddon, Buloke and Northern Grampians. The purpose of LLENs is to support children and young people who are at risk of disengaging (or have already disengaged) from education and training and who are not meaningfully employed.

NCLLEN uses their knowledge of the region to influence strategic planning and broker partnerships geared towards keeping children and young people participating in education or training. Through the Strong Families, Strong Children Program (SFSC) they support stronger families

and help break the cycle of disadvantage with early interventions for school readiness. This includes engaging with whole families to build capacity and confidence as well as facilitate wrap-around services. SFSC aims to change the system one child and family at a time.

Using co-design methodology and a systems-based approach, NCLLEN develop place-based, whole-of-community initiatives that connect children, families, teachers and community support services to improve educational outcomes and create strong partnerships and a better, more sustainable service system for every child. SFSC aims to create a model that can scale this work at a time of growing inequality across Australia.

**Date of grant:** April 2018

**Amount:** \$400,000 over 3 years



*'It takes a village to raise a child' – some of Loddon's committed community members.*

*"Children living in the rural communities of the Loddon Shire deserve the same level of access to education, school readiness resources and family support as those living within regional centres or metropolitan Melbourne. This project, enabled by the William Buckland Foundation, is about addressing the fact that year upon year, around 160 of our 0- to 8-year-olds children live in very disadvantaged families and face high-to-extreme levels of developmental vulnerability, which correlates directly to those children not starting school ready to learn. Our children are more than twice as likely to arrive at school, inappropriately dressed, late, tired or hungry."*

Tricia Currie, Chair NCLLEN

## Concern Australia

### Hand Brake Turn Local and Mobile



Hand Brake Turn students working on a car in Braybrook.

Concern Australia offers a diverse range of programs and services to support vulnerable young people and children living in Victoria. The organisation assists those considered at-risk or disadvantaged due to abuse, homelessness, substance addiction,

build self-esteem and life skills. Students also take part in excursions and hear from guest speakers that provide additional insight and inspiration as well as connect participants to the workforce and local community. Upon completing the training,

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*"Our programs focus on assisting children, teenagers and young adults (5–21 years) to overcome barriers that inhibit them from achieving their potential. Thanks to the support of the William Buckland Foundation, we're able to create opportunities that empower young people to achieve their hopes, dreams and aspirations by providing meaningful opportunities that effect positive change in their lives."*

**Ms Michelle Crawford, CEO**

crime, or a lack of education and/or employment opportunities. The Hand Brake Turn program empowers young people aged between 15 and 21 with practical, hands-on automotive skills such as mechanical repair work and trade preparation. More broadly, it gives them an opportunity to be mentored in a supportive environment, helping to

participants are presented with a Certificate at the end of their course, boosting their confidence and opening up opportunities for employment.

**Date of grant:** October 2017

**Amount:** \$590,839 over 4 years



## Glenallen School

### Glenallen STEM Learning Hub

Glenallen School is Victoria's largest government school catering for students who have a physical disability and/or complex medical needs. Its trans-disciplinary teams – which include teachers, physiotherapists, occupational therapists and speech pathologists – holistically plan, implement and evaluate individual student-focused learning

technology, engineering and mathematics] that students with physical disabilities experience by providing equipment that will enable them to participate as independently as possible. This includes eyegaze and switch-enabled technology; specially modified science equipment; and large-scale mathematics and robotics equipment

*"At Glenallen we strive to be a world's best practice specialist school providing innovation and excellence in teaching and learning. Individual educational and therapeutic programs are designed to promote student achievement as well as maximising independence in functional activities of daily living. We aspire to provide for the development of each student intellectually, socially, physically and emotionally, and this grant from the William Buckland Foundation will go a long way to help."*

Mrs Jennifer Healey, Assistant Principal

programs to maximise impact and outcomes. Further enhancing these programs is a network of specialists that includes a music therapist, nurses, a community well-being officer, program assistants and disability support workers. The Glenallen STEM Learning Hub will address the lack of access to STEM subjects (science,

designed for use by students who may have issues with movement and motor control. Thanks to this technology all students will be able to meaningfully participate in the STEM curriculum.

**Date of grant: October 2017**

**Amount: \$100,000**

#### ENABLING EDUCATION PROGRAM GRANTS APPROVED 2017/2018

- **The Arts Centre:** The curious case of the perennially unpopular maths  
**\$54,595**
- **Asylum Seeker Resource Centre:** Empowerment to Education for youth seeking asylum.  
**\$202,500**
- **BSTMI trading as Discovery Science & Technology Centre:** Educating Educators  
**\$75,000**
- **Concern Australia:** Hand Brake Turn Local and Mobile  
**\$590,840**
- **University of Melbourne:** Koorie Student Support Fund – VCA Wilin Centre  
**\$4,500**
- **North Central Local Learning and Employment Network Inc:** Strong Families Strong Children Loddon Shire (SFSCCL) – Family Education Program.  
**\$400,000**
- **Orchestra Victoria:** Orchestra Victoria Regional Education - Extension Grant.  
**\$70,000**
- **Philanthropy Australia:** Philanthropy Champions  
**\$75,000**
- **Zoe Support Australia:** Great Expectations – assisting young mothers to complete education – Extension grant.  
**\$240,000**

**TOTAL GRANTS APPROVED IN THE ENABLING EDUCATION PROGRAM: \$1,712,435**



# Improved Health Program

## **PROGRAM GOAL**

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

### **Total grants paid in 2017/2018**

\$1,309,283

### **Total new grants approved in 2017/2018**

\$1,262,000

The WBF Improved Health Program supports a range of initiatives that help produce better health outcomes for disadvantaged young Victorians. For the next three to five years the Program will focus 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.

## Kids Plus Foundation

### Capacity Building and Organisational Development



Opening January 2020, the Kids Plus Centre for Therapy, Research and Training, in Geelong.

Kids Plus Foundation's purpose is to support babies, children and young people with neurodevelopmental disabilities to reach their full potential and maximise their participation in daily life. The Foundation achieves this through physiotherapy, occupational therapy, speech pathology, music therapy as well as social work programs.

Previously entirely reliant on community and fundraising support, KPF now earns 60% of its

of its services, which include supporting 250+ families across Greater Geelong and South West Victoria by 2022; investing further in specialist research collaborations; and continuing to deliver professional development workshops – as well as attaining a goal of 85% revenue generation from fees for services. Central to these plans is the Kids Plus Centre for Therapy, Research and Training which will be operational in 2020.

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*"We work in partnership with families to understand their needs, values and abilities. In addition to our therapy program, we value sharing our knowledge with families, early learning centres and schools to create more inclusive communities. Our service aims to empower families and improve capability to maximise potential and enhance participation in everyday activities. We care about improving quality of life. Over a four-year period, support from the William Buckland Foundation has given Kids Plus the opportunity to thrive."*

**Shaun Cannon, CEO Kids Plus Foundation**

revenue from fees for services. This transition was made possible by support from the WBF, and an extension grant has now allowed the Foundation to embark on a two-year Capacity Building and Organisational Development project. This initiative will see the Foundation deploy new staff, systems and capabilities to support the expansion

This world-class centre will offer best-practice paediatric therapeutic services as well as facilitate community initiatives to promote the inclusion and participation of people with a disability.

**Date of grant:** April 2018

**Amount:** \$232,000 over two years

## Bendigo Community Health Services

### Flagship Grant – Paediatric Clinic Services

Bendigo Community Health Services is a not-for-profit organisation that works to provide health and well-being services to the Bendigo community across a wide platform of services. These are designed to keep people healthier for longer, better manage their own care, prevent avoidable disease and intervene as early in life as possible to help children achieve the healthiest possible lives. Services include mental health and counselling, sexual and reproductive health, general practice, alcohol and other drugs, chronic disease management, refugee settlement and support, health promotion and a range of children and family services including specialist community paediatricians and paediatric allied health.

There is an enormous demand for paediatric services in Bendigo and beyond. The Community Paediatrics in Bendigo Project will seek to make these services more accessible by analysing

current and projected demand and exploring alternative models to meet a growing gap between the number of children who need specialist services and the capacity to meet their needs. The project will enable development of a 'case for change' as well as a platform from which to advocate for that change. Healthcare must be accessible by all members of the community, particularly those who are vulnerable, and it is critical as part of efforts to reduce disadvantage.

BCHS's new Kidzspace facility, opened in 2016, shows what can be achieved through a build-and-service approach that brings together under one roof paediatrics, specialist allied health, and social and support services.

**Date of grant:** April 2018

**Amount:** \$1,000,000 over four years

*"By offering a range of paediatric services, BCHS creates opportunities to respond to health issues for children that may otherwise go undetected or untreated, some of which could have lifelong impact. It means we're providing services that meet family needs, are affordable and foster generational change. The phenomenal assistance from The William Buckland Foundation will help us build a sustainable model for these services in regional Victoria."*

Kim Sykes, CEO Bendigo Community Health Services

#### IMPROVED HEALTH PROGRAM GRANTS APPROVED 2017/2018

- **Bendigo Community Health Service Ltd:** Community Paediatrics in Bendigo  
**\$1,000,000**
- **Kids Plus Foundation:** Capacity Building and Organisational support  
**\$232,000**

- **Melbourne Health:** Lynly Aitkin Travelling Scholarship  
**\$30,000**

**TOTAL GRANTS APPROVED IN THE IMPROVED HEALTH PROGRAM:**  
**\$1,262,000**



# Vulnerable Victorians Program

## **PROGRAM GOAL**

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

### **Total grants paid in 2017/2018**

\$1,946,871

### **Total new grants approved in 2017/2018**

\$2,429,940

The WBF Vulnerable Victorians Program supports funding proposals that focus on alleviating disadvantage and poverty for Victorians. For the next three to five years the Program will focus on contributing to better housing and employment outcomes.

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## Conscious Creative Limited (trading as HoMie Street Store)

### The Pathway Project



*A label for the streets. 100% of HoMies profits support young people experiencing homelessness or hardship.*

Established in 2014, HoMie is a social enterprise streetwear clothing store in Fitzroy, Victoria (as well as online) that is tackling the issue of youth homelessness in Melbourne. The HoMie Pathway Project extends opportunities for housing, vocational training and meaningful employment to marginalised Victorians aged 18-25 whose access to these opportunities would be otherwise limited.

Pathway Alliance], a program to up-skill workplaces in how to successfully train and employ at-risk youth. HoMie will then replicate the Pathway Project through this network. By broadening the types of workplaces willing to take on at-risk youth as trainees, the initiative will give the trainees greater choice in the type of work they wish to pursue, based on their interests, skills and abilities. 'HoMie work-ready' will enable HoMie to provide training

*"Our vision is an Australian society free of homelessness. Our mission is to build confidence and job skills for young people and create unique pathways out of homelessness."*

**Mr Nick Pearce, CEO HoMie**

Apart from being provided with accommodation, Pathway participants are trained as retail workers at HoMie after which they receive a Certificate III in Retail Operations and are offered guaranteed employment at Cotton On upon graduation. To expand its impact, HoMie will develop and deliver 'HoMie work-ready' (now called The HoMie

and employment pathways to an additional 16 young people over the next three years, after which they will receive ongoing employment at a leading Australian retail chain.

**Date of grant:** December 2017

**Amount:** \$436,940 (over three years)

## Sacred Heart Mission J2SI Social Impact Investment



Catherine Harris, General Manager Business Development and Anna Paris, Operations Manager. Photography by Bubble Productions.

Since opening its doors in 1982, Sacred Heart Mission has been working to improve the lives of the most disadvantaged members of our community. Every day, the Mission works alongside those living in poverty or without a roof over their heads, providing shelter, food, health care and support often in partnership or collaboration with other organisations and agencies.

The majority of its 'on-the-ground' services are based in the City of Port Phillip (St Kilda and surrounding areas), along with women's accommodation located in Reservoir and Thomastown with outreach services across inner Melbourne. However, Sacred Heart's research, policy and advocacy work aims to address the

underlying causes of deep, persistent disadvantage throughout Australia.

The Journey to Social Inclusion Social Impact Investment builds on 10 years of successful program delivery that's seen excellent results proven by randomised control trials. The William Buckland Foundation granted \$750,000 over three years in 2009 to support the trial. The J2SI program is designed to get people into housing and to remain in housing, by helping them resolve the issues in their life and achieve greater independence and social connectedness through employment, training, education and volunteering.

**Date of grant:** July 2018

**Amount:** \$250,000 guarantee

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*"What William Buckland have done with this pledge is incredibly innovative in the world of Australian philanthropy. The J2SI Social Impact Investment is the first of its kind in Australia and William Buckland Foundation have been part of a group of innovative philanthropists willing to use the power of their granting to create social change."*

Catherine Harris, General Manager Business Development SHM

## TRY Australia

### TRY Build Project

Since 1883, social purpose organisation TRY has been providing mentoring, training and job opportunities to disadvantaged young people lacking formal education or employment. The TRY Build project will address the systemic social issues of youth unemployment and housing affordability affecting 16- to 25-year-olds living in the City of Greater Dandenong and catchment areas of South East Victoria. By producing affordable, sustainable housing, opening up training and employment pathways and providing wrap-around

mentoring and job placement support, the project will assist those from lower socio-economic backgrounds to re-engage with learning, complete hands-on vocational construction training and receive Certificate II Construction and Building accreditation with a view to achieving meaningful employment.

**Date of grant:** February 2018

**Amount:** \$500,000 over 4 years

*“TRY Build, supported by the William Buckland Foundation, will help create professional skills and employment pathways for young people facing disadvantage. Additionally, the sale of TRY Build products (corporate furniture, container conversions and social housing) will generate revenue and maintain a successful and impact-driven social enterprise to support the program’s continuation.”*

Grace Gallicchio, Director – Children, Youth & Families & Acting CEO

### VULNERABLE VICTORIANS PROGRAM GRANTS APPROVED 2017/2018

- **Domestic Violence Victoria:** Family Violence Philanthropy Collaboration Project brings together the philanthropic, government and family violence sectors in the implementation of the Royal Commission into Family Violence recommendations  
**\$30,000**
  - **Conscious Creative Limited (trading as HoMie Street Store):** The Pathway Project  
**\$436,940**
  - **Free To:** Now to Launch Food Startup Incubator  
**\$288,000**
  - **Habitat for Humanity Australia (Victoria) Inc:** Completing the Yea Heights Estate Development (Prospect Rise, Yea) and building organisational capability  
**\$500,000**
  - **Kids Under Cover:** Partner In Preventing Youth Homelessness.  
**\$150,000**
  - **Outer Urban Projects:** Linkages Employment Generator.  
**\$150,000**
  - **Sacred Heart Mission:** Journey To Social inclusion – Social Impact Bond Guarantee  
**\$250,000**
  - **SYC:** Sticking together project extension of a pilot project connecting young people in Melbourne’s inner west with jobs and keeping them employed for 60 weeks  
**\$125,000**
  - **TRY Australia:** TRY Build Project  
**\$500,000**
- TOTAL GRANTS APPROVED IN THE VULNERABLE VICTORIANS PROGRAM:**  
**\$2,429,940**





# Small Grants Partnership Program

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 in finding critical small-scale grass roots projects or supporting work in a specialised focus area for the Foundation.

Closely managed by the Foundation, these partnerships are designed and developed to achieve positive community impact and achieve greater reach to local communities and audiences.

The Foundation has supported over 100 small grants to small community projects in 2018 with our partner organisations.

**Total Grants Paid in 2017/2018: \$404,500**



## Wettenhall Environment Trust

### Connecting Country



*A volunteer at the Winton Wetlands sinking a temperature probe for a project on reintroducing the Growling Grass Frog.*

Wettenhall Environment Trust (formerly The Norman Wettenhall Foundation) provides support for people undertaking projects that will make a positive difference to the natural living environment. The main grant-making areas are flora and fauna conservation, threatened mammal conservation, and landscape restoration and education.

Wettenhall funds a number of projects in agricultural landscapes across Victoria, including a study of the genetics of *banksia marginata* in order

to reintroduce this native flora to landscapes; a farmer-led group that works with landholders to identify paddock corners suitable for revegetation; research into the effectiveness of windbreaks on farms for habitat; rewilding Growling Grass Frogs into the wetlands of Victoria's north-east; monitoring platypus in the Barwon River; and producing signs for a frogland and pollinator garden.

**Date of grant:** April 2017

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*"Grants like that from the William Buckland Foundation help us work with landholders, run education activities, produce helpful resources, and undertake research and monitoring that will paint a picture about our State's environmental health and what can be done to conserve our native species and their habitat."*

Beth Mellick, Executive Director WettenHall Environment Trust

## Foundation for Rural & Regional Renewal (FRRR)



*The Cavendish Red Gum Festival used an arts and cultural approach to inform the community about local environmental issues.*

The Foundation for Rural & Regional Renewal (FRRR) is a not-for-profit organisation that harnesses the power of collective investment between government, business and philanthropy to improve the lives of those living in rural, regional and remote Australia. FRRR's vision is for vibrant, sustainable and adaptive communities across rural, regional and remote Australia. The William Buckland Foundation helped support rural Victorians by donating \$435,500 to FRRR in the 2017/18 financial year.

Through FRRR's Back To School program, \$30,000 was distributed in the form of more than 600 \$50 vouchers. These vouchers were used to purchase school essentials – such as uniform items, shoes and stationary – through six community partners across Victoria, helping rural students doing it tough to start the school year feeling engaged and positive about learning.

The WBF funded 31 Victorian projects through the Small Grants for Rural Communities program in 2017.

This program provides grants up to \$5,000 to fund local projects that create vibrant places where people want to live and work. Recent examples include the Cavendish Red Gum Festival, upskilling locals in Towong through employment-related courses, purchasing equipment for the Nhill & District Kindergarten, and developing a Koorie Early Years Cultural Kit by the Gunditjmarra Aboriginal Co-Op.

In partnership with FRRR, the WBF also provided \$250,000 to the Upper Murray Innovation Foundation to assist them in developing their second social enterprise venture, Upper Murray Rural Services. This automotive, agricultural and marine repair-and-maintenance business in Walwa will provide vital employment opportunities in North East Victoria whilst ensuring that local services are retained for the community.

**Date of grant:** July 2017

**Amount:** \$435,500

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*“Small communities often don't have access to the same level of philanthropic support as our metropolitan counterparts. It is wonderful to work with the William Buckland Foundation to support Victorian rural, regional and remote communities to further their ideas to address local issues, with local solutions.”*

**Natalie Egleton, CEO FRRR**

## Igniting Change

Igniting Change is intentionally tiny, moving quietly and quickly to create awareness and support for social issues that are often hidden, entrenched and outside usual funding paradigms. Listening to the people closest to these issues provides an opportunity to discover underlying causes and unexpected insights. With this information and engagement, new ideas are explored and positive change is ignited.

It offers a range of support from identifying gaps in the system to investigating new ideas and approaches.

By introducing the courageous individuals and organisations we work with to others who are interested in learning and potentially contributing time, funds or expertise, new conversations start, relationships emerge and support is catalysed.

*“As a catalyst we feel very privileged to have the trust of the William Buckland trustees who empower us to build trust-based relationships deep within the community; from these we draw valuable insights that can be used to raise awareness and inspire change across many levels of the community.”*

Jane Tewson CBE, Director Igniting Change

Using funding from the William Buckland Foundation, Igniting Change has supported 32 projects (averaging \$4,609 each) addressing such issues as education, emergency relief, employment, community development, homelessness, refugees, addiction and mental health.

We follow up closely to find out how projects are going, always cultivating an honest exchange and being open to finding yet more insights into complex and challenging issues.

**Date of grant:** October 2017 & March 2018

**Amount:** \$147,500



Before and after shots of a bathroom in a youth services home for seven young people who would otherwise be homeless.

# Financial Report

## Investment Overview

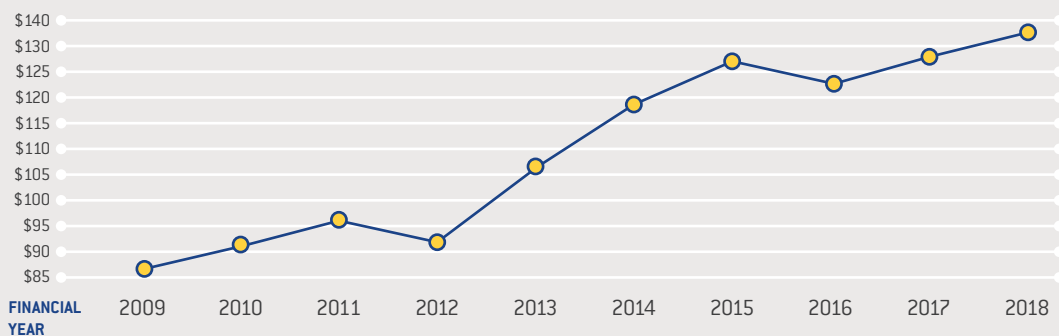
The Trustees consider that, as The Foundation is a perpetual trust, the amount available for distribution to charities will be maximised over time if a relatively high proportion of the corpus is invested in growth assets, particularly equities.

## Capital Value

The net assets of The Foundation as at 30 June 2018 were **\$131,465,309** (2017 \$128,678,700)

### The Foundation's Capital Value

million



## 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 2018 were:

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

## Impact Investment

The Trustees have agreed to commit up to 5 per cent of the Foundation's portfolio to impact investments. To date, three impact investments have been made totalling \$900,000.

## Net Income

The portfolio, which has an income bias, generated a net income available for distribution for the year of \$6.4 million (2017 \$6.2 million). Capital Items of \$0.633m (2017 \$1.6m) consisting of such things as the dividends and franking credits relating to off market share buy backs, and tax deferred and capital distributions from investee entities have been removed from income for the year before calculating the amount of Distributable Income.

## 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 1.02% (2017 1.04%)

# Concise Financial Report

## 2017-2018

### Statement of Income Available for Granting

For the year ended 30 June 2018

	2018 \$	2017 \$
<b>REVENUE</b>		
Interest	88,548	74,265
Estate distributions	42,544	47,435
Dividends	1,895,687	2,042,192
Managed investment distributions	3,631,689	3,988,191
Imputation credits	2,031,362	2,346,451
Management fee rebate	190,922	186,856
Accountancy fee rebate	4,279	-
Other income	-	32
<b>Total Revenue</b>	<b>7,885,031</b>	<b>8,685,422</b>
<b>EXPENSES</b>		
Equity Trustees Limited Fees	560,818	551,430
Co Trustees' fees	4,000	4,000
Investment management & custodian fees	267,120	254,957
Other expenses	37,095	26,634
<b>Total Expenses</b>	<b>869,033</b>	<b>837,021</b>
<b>Net Income for the Year before Grants Paid</b>	<b>7,015,998</b>	<b>7,848,401</b>
Less Transfer Capital Components	(633,688)	(1,607,844)
<b>Distributable Income</b>	<b>6,382,310</b>	<b>6,240,557</b>
Grants Paid*	6,905,759	5,249,000
<b>Net Income for the Year</b>	<b>523,449</b>	<b>991,557</b>
Retained Earnings at 1 July	8,612,038	7,620,481
<b>Retained Earnings at 30 June</b>	<b>8,088,589</b>	<b>8,612,038</b>

\*Note: The difference in the grants paid above and the total grants paid on page 32 is due to the return of unspent grants from previous financial years.

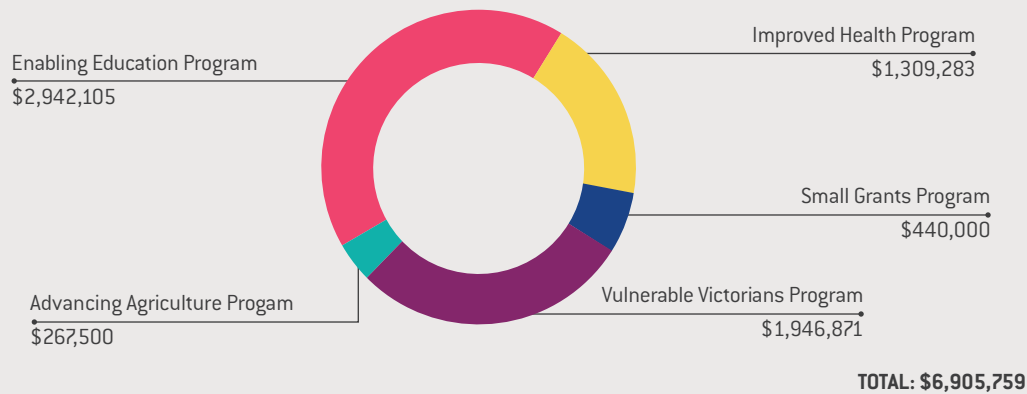
## Statement of Financial Position

As at 30 June 2018

	2018 \$	2017 \$
<b>CURRENT ASSETS</b>		
Cash and Cash Equivalents	6,409,804	5,801,230
Loan receivable	200,000	-
Receivables	3,024,781	3,899,141
<b>Total Current Assets</b>	<b>9,634,585</b>	<b>9,700,371</b>
<b>NON CURRENT ASSETS</b>		
Loan receivable	400,000	-
Financial Assets	121,665,115	119,205,896
<b>Total Non Current Assets</b>	<b>122,065,115</b>	<b>119,205,896</b>
<b>Total Assets</b>	<b>131,699,700</b>	<b>128,906,267</b>
<b>CURRENT LIABILITIES</b>		
Payables	234,391	227,567
<b>Total Current Liabilities</b>	<b>234,391</b>	<b>227,567</b>
<b>Total Liabilities</b>	<b>234,391</b>	<b>227,567</b>
<b>NET ASSETS</b>	<b>131,465,309</b>	<b>128,678,700</b>
Represented by:		
Retained Earnings	8,088,589	8,612,038
Capital Funds	123,376,720	120,066,662
<b>TOTAL TRUST FUNDS</b>	<b>131,465,309</b>	<b>128,678,700</b>

# Grants Paid

## July 2017 – June 2018



### Anglicare Victoria

*The Home Stretch Campaign*

**\$125,000**

### Anglicare Victoria

*TEACHaR – Transforming Educational Achievement for Children in Home-based and Residential Care*

**\$150,000** (2nd of 2 instalments)

### Asylum Seeker Resource Centre

*Empowerment to Education for youth seeking asylum*

**\$99,000** (1st of 2 instalments)

### Australian Centre for Rural Entrepreneurship

*Social Enterprise in Schools and Beyond – Job Seeker to Job Creator*

**\$150,000** (2nd of 3 instalments)

### Banksia Gardens Community Services

*Project REAL (Re-Engagement in Education and Learning)*

**\$100,000** (2nd of 2 instalments)

### Baptcare Home-Start

*Targeting vulnerable parents with school aged children*

**\$25,000** (2nd of 3 instalments)

### Bendigo Community Health Services

*Community Paediatrics in Bendigo*

**\$250,000** (1st of 4 instalments)

### Birchip Cropping Group

*BCG Community Network – solving the big issues in agriculture*

**\$105,000** (1st of 3 instalments)

### Concern Australia

*Hand Brake Turn Local and Mobile*

**\$148,710** (1st of 4 instalments)

### Country Education Project

*Rural Education – Accessible Learning (REAL Project)*

**\$100,000** (2nd of 4 instalments)

### Domestic Violence Victoria Inc

*Family Violence Philanthropy Collaboration Project*

**\$30,000**

### Doveton College

*The Music Futures Program: A central program of Our Place*

**\$125,000** (2nd of 3 instalments)

### Eating Disorders Foundation of Victoria

*Peer mentoring program for eating disorders patients leaving hospital*

**\$100,000** (2nd of 3 instalments)

**\$100,000** (3rd of 3 instalments)

### EdConnect Australia

*Intergenerational Impact*

**\$150,000** (2nd of 3 instalments)

### Farmers for Climate Action

*Victorian Climate-Smart Agricultural Fellowship*

**\$76,000** (1st of 2 instalments)

### Foundation for Rural & Regional Renewal

*Back to School Project*

**\$30,000** (3rd of 3 instalments)



## GRANTS PAID

### July 2017 – June 2018

#### Foundation for Rural & Regional Renewal

Upper Murray Rural Services – The Walwa Project

**\$250,000**

#### Foundation for Rural & Regional Renewal

Grant for regional Victorian Women to further their environmental leadership

**\$5,500**

#### Foundation for Rural & Regional Renewal

Small Grants For Small Rural Communities Program (Vic)

**\$150,000** (1st of 3 instalments)

#### Free To Ltd

Now to launch food startup incubator

**\$144,000** (1st of 2 instalments)

#### Geelong Ethnic Communities Council trading as Diversitat

Rights to work

**\$89,531** (2nd of 3 instalments)

#### Glenallen School

Glenallen STEM Learning Hub

**\$100,000**

#### Good Cycles Ltd

Bike Therapy

**\$50,000** (2nd of 3 instalments)

#### Habitat for Humanity Australia (Victoria)

Completing the Yea Heights estate development and building our capability

**\$100,000** (1st of 3 instalments)

#### Haileybury Foundation

William Buckland Foundation and Haileybury Scholarship Fund – Scholarships for Indigenous students

**\$25,000** (4th of 4 instalments)

#### HoMie

The Pathway Project

**\$143,340** (1st of 3 instalments)

#### Igniting Change Foundation

Changing Lives Small Grants Partnership

**\$150,000** (3rd of 3 instalments)

#### Discovery Science and Technology Centre

Educating Educators

**\$20,000** (1st of 4 instalments)

#### Kids Plus Foundation

Capacity building and organisational development

**\$114,000** (1st of 2 instalments)

#### Kids Thrive Inc

Kids Leading Local Change

**\$70,000** (3rd of 3 instalments)

Core organisational support

**\$50,000** (2nd of 4 instalments)

#### Kids Under Cover

Partner In Preventing Youth Homelessness

**\$75,000** (1st of 2 instalments)

#### Royal Melbourne Hospital

Lynly Aitken Travelling Scholarship

**\$10,000** (1st of 3 instalments)

#### Melbourne Indigenous Transition School

Victorian Indigenous Students at the Melbourne Indigenous Transition School

**\$120,000** (3rd of 5 instalments)

#### Melbourne Recital Centre

Share More Music – a music education & accessibility program

**\$112,300** (5th of 6 instalments)

#### Merri Health

Ready Set Prep Program

**\$180,000** (2nd of 4 instalments)

#### North Central Local Learning and Employment Network Inc

Strong Families Strong Children Loddon Shire (SFSC) – Family Education Program

**\$200,000** (1st of 3 instalments)

#### Nuffield Australia

Nuffield Australia Farming Scholarship for a Victorian farmer – 2016 to 2018

**\$51,000** (3rd of 3 instalments)

#### Orchestra Victoria

Orchestra Victoria Regional Education

**\$70,000** (3rd of 3 instalments)

#### Outer Urban Projects

Linkages Employment Generator

**\$50,000** (1st of 3 instalments)

## GRANTS PAID

July 2017 – June 2018

### Permanent Care and Adoptive Families

*Keeping Families Together – Supporting children and their families joined through permanent care and adoption in regional Victoria*

**\$120,000** (2nd of 3 instalments)

### Philanthropy Australia

*Philanthropy Champions*

**\$25,000** (1st of 3 instalments)

### Polyglot Theatre

*5678: an artistic intervention to early school leaving and social isolation in Collingwood*

**\$50,000** (2nd of 3 instalments)

### Royal Institute for Deaf and Blind Children (formerly Taralge)

*Developing three micro-centres and several regional hubs to provide seamless integration of services for children 0-12 years of age*

**\$50,000** (3rd of 3 instalments)

### Save The Children Australia (formerly Hands on Learning Australia)

*Increasing accessibility to Hands on Learning across Victoria*

**\$180,000** (3rd of 3 instalments)

### Skilling Australia Foundation

*APPeTitE (Accessible Pathways to Training and Education) for young people aged 17-25*

**\$88,000** (2nd of 4 instalments)

### Social Traders Ltd

*Social Enterprise Bridge Initiative*

**\$300,000** (2nd and 3rd of 3 instalments)

### Summer Foundation

*NDIS Hospital Liaison Role*

**\$150,000** (2nd of 3 instalments)

### SYC Ltd

*Sticking Together Project*

**\$125,000**

### TaskForce Community Agency

*The Hub*

**\$175,108** (1st and 2nd of 2 instalments)

### Teach For Australia

*Enabling Instruction Leadership Pilot (EILP)*

**\$105,000** (2nd of 4 instalments)

### Dugdale Trust for Women & Girls

*Club Respect*

**\$70,000** (3rd of 3 instalments)

### The Salvation Army Australia (Southern Territory)

*The Yarrinup Project*

**\$100,000** (3rd of 3 instalments)

### Tomorrow Today Foundation

*Education Benalla Program – Extension*

**\$200,000** (2nd of 3 instalments)

### TRY Australia

*TRY Build Project*

**\$150,000** (1st of 4 instalments)

### University of Melbourne

*Koorie Student Support Fund – VCA Wilin Centre*

**\$4,500**

### Very Special Kids

*The Road to Respite*

**\$66,176** (2nd of 2 instalments)

### Victorian Arts Centre Trust

*The Curious Case of Perennially Unpopular Maths*

**\$54,595**

### Western District Health Service

*From inside the farm gate: Rural Women's stories of thriving and surviving*

**\$30,000**

### Wettenhall Environment Trust

*Small Grants Partnership Program*

**\$110,000** (3rd of 3 instalments)

### Worktrainers Ltd

*Geared 4 Careers*

**\$75,000** (3rd of 3 instalments)

### Orygen

*A Systematic Approach to Youth Suicide Prevention*

**\$150,000** (2nd of 4 instalments)

### Yooralla

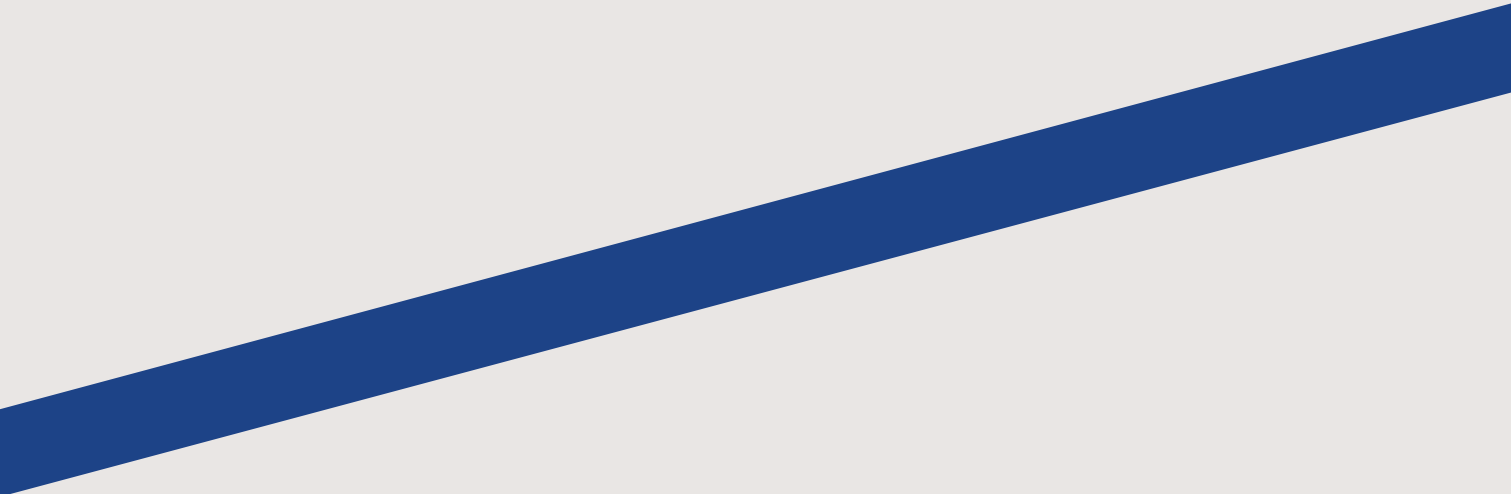
*On the Move – State-wide early functional mobility service*

**\$93,999** (3rd of 3 instalments)

### Zoe Support Australia

*Great Expectations – assisting young mothers to complete education*

**\$240,000** (3rd of 3 instalments)



THE  
**WILLIAM  
BUCKLAND**  
FOUNDATION



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