



# ANNUAL REPORT 2023

Ballarat Foundation United Way Inc  
Ballarat Foundation Charitable Fund Ltd  
Ballarat Foundation Trust





The Ballarat Foundation acknowledges the Wadawurrung people, the traditional owners of the lands and waterways in our region. We recognise their diversity, resilience, and the ongoing place that Aboriginal and Torres Strait Islander people hold in our communities. We pay our respects to the Elders, both past and present, and commit to working together in the spirit of mutual understanding, respect and reconciliation.



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Ballarat Foundation United Way Inc is a DGR1 status, not-for-profit public benevolent institution which has been supporting the Ballarat community for more than 40 years.

## VISION

Enabling giving to build thriving communities free from disadvantage in the Ballarat region.

## MISSION

The Ballarat Foundation inspires positive community change by supporting programs and enabling philanthropic solutions which reduce disadvantage and encourage connection, cohesion and prosperity.

## KEY VALUES

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### RESPONSIBLE

We are accountable to our donors, partners and the communities we serve. We are good stewards of the funds we raise and will ensure our distributions and reporting are transparent.



### ENABLING

We amplify our impact by working in partnership with others to build a strong community.



### LEADERSHIP

We are a leader and innovator in philanthropy.



### INCLUSIVE

We embrace and promote inclusivity and equity. We are committed to actively supporting and promoting diversity across leadership, staff, volunteers, participants and grant recipients.

# LEADERSHIP REPORT

*2023 was a year of growth and progression for The Ballarat Foundation.*

Following the release of the Ballarat Vital Signs, a new in-depth print and online publication exploring more than 100 indicators of our community's social wellbeing, the Foundation took carriage of new initiatives and re-imagined existing programs to focus on positive impact delivery, in 2023.

Central to the long-term vision of the Foundation is the creation of the Ballarat Community Hub, a project which will both establish a sustainable revenue stream but also enable smaller not-for-profit organisations to collaborate in an affordable and modern manner. Demolition work on the facility began in late 2023, with the expectation operations will begin in early 2025.

Continuing the legacy of the Ballarat Winter and Christmas Appeals passed from radio station 3BA 102.3FM to the Ballarat Foundation in 2022. More than \$140,000 was distributed across the appeals in 2023 in financial support, with tens of thousands of dollars in food and household items distributed to Ballarat families.

Distributions from the Foundation's sub funds in 2023 totalled almost \$250,000, with program distributions in excess

of \$55,000 bringing total financial distributions to more than \$303,000.

The great generosity of the Ballarat community saw \$540,000 gifted through fundraising and sub fund donation activities. Without our donors, we cannot sustain our long-term positive impact.

In March 2023, the Ballarat Women's Fund was launched. The fund is a giving circle model, providing members with the opportunity to influence local responses to issues including gendered violence and inequality. Through memberships, donations and matched funding, more than \$100,000 has been raised in the first year of operation – a reflection both of the importance of these issues and the willingness of the community to unite in response.

The new Women's Fund is indicative of the Foundation's forward thinking.

In October, the Foundation hosted the Ballarat Celebration of Giving Lunch, featuring Olympic Gold Medallist Cathy Freeman, speaking about her athletic career and how she gives back to community. The lunch provided a platform to launch the Ballarat Foundation's five year strategy – an ambitious plan to deliver \$1 million in annual financial distributions to the Ballarat community by the end of 2028.

On the ground, the hundreds of program participants across the Foundation's own TAC L2P Learner Driver Program, Volunteering Ballarat, Dolly Parton's Imagination Library, and more than 20 community projects funded by the Foundation ensures that our work in

responding to community needs seeps deep into the fabric of our community.

Our major events, Dancing with our Stars and Run for a Cause, triumphed in 2023, with a new course for Run For A Cause – and improved weather – leading to an uptick in event participation.

Like so many in our community and indeed the world, the Foundation faces the ongoing challenge of supporting the community and our operations as we face ongoing economic instability.

Our amazing operational team and board directors whose commitment, passion and skill serves to further our vision, mission and values are working each day to enable a Better Ballarat. Our heartfelt thanks to each of you.

Last but most importantly, thank you to each individual and organisation who donates or is a supporter of the Ballarat Foundation and the work we do – these relationships are even more vital during challenging times.

We look forward to continuing all of these great relationships into the future as we connect people, promote philanthropy in fresh and innovative ways and most importantly help build a community that is just, equitable and free of poverty.



**Wayne Weaire**

*Board Chair*



**Andrew Eales**

*Chief Executive Officer*

## SUB FUND DISTRIBUTIONS

**\$247,795**

## TOTAL FINANCIAL DISTRIBUTIONS

**\$303,755**

## COMMUNITY GIFTED

**\$540,622**

## BALLARAT WOMEN'S FUND

**\$100,000+**

# TREASURER'S REPORT

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*Thanks to our generous community, partners, volunteers and the team at the Ballarat Foundation, 2023 has been a successful year allowing us to meet and exceed our vision and impact on Ballarat.*

For the 2023 financial year, the Ballarat Foundation continued to make a positive and lasting difference to the people in the Ballarat region. As we strive to continue and increase the impact, it is vital that we focus on maintaining and growing the corpus – through donations, bequests and well managed investments.

The corpus is at the heart of the Ballarat Foundation and facilitates generous distributions each year. The majority of corpus funds are held for perpetuity and therefore the growth in corpus provides for long-term, meaningful impact for the Ballarat region.

The corpus continued to strengthen in 2023 with income totalling \$512,424. Program income for the year totalled \$1,493,467. The surplus for the Ballarat Foundation in 2023 is \$311,284 exceeding budget expectations due to the continued growth of the Ballarat Foundation and critical management of expenses.

There was a decrease in grant distributions in comparison to 2022. A total of \$303,755 was provided to recipients in 2023, including the distribution of books and back to school vouchers totalling just over \$55,000.

At 2023 year-end \$4,150,000 of assets is held in the Ballarat Foundation corpus (including property, cash and receivables). After a volatile period for investments, the year ended on a positive note with investment values on the increase once again, thanks to the stringent management of corpus funds by JB Were and the management team.

The programs of the Foundation including TAC L2P program and Volunteering Ballarat, along with events including Dancing with our Stars and Run for a Cause have continued to contribute to the success of the Ballarat Foundation in 2023.



**Nigel Jarvis**

*Treasurer*



## 2023 AT A GLANCE

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**\$102,995**

GRANTS DISTRIBUTED



**\$144,800**

APPEALS DISTRIBUTIONS



**70**

L2P LICENCES OBTAINED



**3,828**

BOOKS DELIVERED



**\$235,405**

EVENT FUNDRAISING



**\$27,250**

DISTRIBUTED IN BACK TO SCHOOL  
VOUCHERS

# COMMUNITY IMPACT

## FUNDED GRANT PROGRAMS 2023

The Ballarat Foundation community grants program involves applications from not-for-profit and community organisations which are assessed against program criteria by an assessment panel.

Grants are funded from the Ballarat Foundation corpus which is supported by sub funds including: Ballarat Foundation Fund, The Courier Charity Fund, Wendouree-Delacombe Fund, James Petrie Fund, Adroit Risk and Insurance, Janine Owen Fund, Advanced Cabinetry Fund, Integra Group Fund, Feed Ballarat Fund, Young Ambition Fund, Canny Family Fund.

All grant distributions are assessed by a panel of community members, experts and the Ballarat Foundation board of directors prior to approval.

### Courier Charity Fund Grant

Grade 5 & 6 Skills & Aspirations Program – Ardoch: \$14,700

Reid's Cooking and Meals for Changes - Uniting VicTas Ltd: \$8,823.50

1:1 Mentoring - Big Brothers Big Sisters Ballarat \$7,120.00

### Community Impact Grants

Meals for Change Café Meals Program – Uniting Vic Tas \$7,500.00

Social Innovators Program - Brophy Family and Youth Services Inc. delivered in partnership with Crazy Ideas College \$7,500.00

BreezeWay Meals Program – Uniting Vic Tas \$7,500.00

Gardener Access – Ballarat Community Garden Inc \$4,908.00

Garden Bed Replacement – Lucas Community Garden \$3,000.00

The Little Things Project – Ballarat Regional Multicultural Council \$5,638.00

Get Forked Garden to Kitchen Program – Sebastopol Mens Shed Inc \$3,670.00

Reid's Edible Food Garden – Ballarat Community Health \$4,248.00

Breakfast Clubs Phoenix & Sebastopol – Hilltop Church Ballarat \$6,036.00

### Wendouree/Delacombe Fund Program

Open Parachute Program – Hand in Hand Ballarat \$5,000.00

Source, Grow, Cook, Work - Y Ballarat Youth Services \$6,850.00

### Peter Amor Sports Participation Fund

ClubMud - ClubMud Ballarat \$5,000.00

Club Inclusion Program - Ballarat Gold Swimming Club Inc. \$4,924.80



# GRANT STORIES

## The Little Things Project

The Ballarat Foundation supported youth from Ballarat and surrounds for a weekend in September of inclusive, intercultural youth activities as part of The Little Things Project.

The project was designed to support wellbeing, social connection, and understanding of post-school pathways for youth aged 12- 25. Held in Ballarat as part of the Ballarat International Foto Biennale's open program, the weekend centered on the launch of an interactive photography exhibition on 'wellbeing', created by multicultural youth in the region.

At the launch, young people had the chance to connect with guest advocates and learn about local health services, including headspace. After the formalities, an intercultural evening, including team-building games and dinner, gave young people from the region the chance to connect in a safe and inclusive space.



*Creating connections was central to the 2023 Little Things Project.*



*The Sebastopol Men's Shed supports daily activities to connect and engage community members.*

## Get Forked Garden to Kitchen Program – Sebastopol Men's Shed

Sebastopol Men's Shed received funding to upgrade and expand the vegetable garden patch that is used to supply vegetables to the kitchen cooking program.

The upgrade enabled men with mobility issues to access all areas of the garden. The improvement included raised garden beds and wider, levelled paths that can be accessed by wheelchairs or walkers in all weather. Additional garden beds also allows an increased supply of vegetables to the kitchen program.

The Shed has more than 60 members, with anywhere between 15 and 30 men attending daily. Many of those who attend will also enjoy lunch from the kitchen.

The program sees the full cycle from propagation to growing vegetables to food preparation and finally cooking and sharing a meal.



## Big Brothers Big Sisters – Des and Casey

Des and Casey have forged a new friendship through Big Brothers Big Sisters Ballarat. They were matched midway through 2023 and have been great mates ever since.

Des is new to Ballarat and has enjoyed exploring the area with Casey by his side. Together they have been on adventures to the beach, bowling and picked up some bargains at a garage sale. They spend time together each Saturday and it is fast becoming the highlight of both their weeks.

Casey looks forward to spending time with Des every Saturday. Casey's mother says he lights up when he sees Des arrive to pick him up. He thinks of Des like a big brother and they have a relationship that is fun and trusting. Casey can confide in Des and speak up about his concerns.

The impact of Big Brothers Big Sisters on a young person's life can be profound. Through the meaningful relationships fostered between mentors and mentees, young individuals can gain a sense of belonging and certainty. The mentor can help the mentee navigate through challenging situations, make informed decisions, and build essential life skills.

# BALLARAT WOMEN'S FUND

In response to the findings of the Vital Signs report, the Ballarat Foundation created the Ballarat Women's Fund to provide a vehicle for local responses to issues of gender inequality and violence against women.

Launched as a giving circle model on International Women's Day in March, members of the fund joined with the opportunity to influence the projects supported by the fund while also contributing to long term fund growth, designed to create a sustainable response to gender inequality.

The fund raised more than \$100,000 in its first year of operation and the very first Pick Our Project evening was held in early 2024, with \$25,000 distributed to projects proposed by local not for profits Raven Collective, Child and Family Services Ballarat (cafs) and WRISC.



*Elia MacKay (cafs), Natalie Illingworth (Raven Collective) and Karryne Hearn (WRISC).*





*Construction work is underway at the Ballarat Foundation Giving Hub in Lydiard St.*

## A CENTRE OF CONNECTION

The Ballarat Community Hub is a visionary long-term project designed to drive positive community impact.

In April 2022, the state government announced it would provide more than \$1 million in funding to support the redevelopment of the Ballarat Foundation premises in the heart of Lydiard St to enable the vision to become a reality.

Through the support of the government, philanthropic funders and community supporters, work began on redeveloping 7 Lydiard Street South in late 2023. Ballarat construction firm Plan Group has been appointed lead contractor for the redevelopment.

The Ballarat Community Hub will provide small not-for-profit organisations the opportunity to collaborate in modern and cost-effective environments in the heart of Ballarat while providing a sustainable revenue model for growth of the Ballarat Foundation's community grants program and program delivery.

The hub is expected to open in early 2025.

## VITAL SIGNS

Data collected in 2023 from SEER Data and Analytics and our local project partners indicated that Ballarat is facing greater disparity between state and national statistics across areas such as long-term health of young people, family violence and cost of living. This data is central to the Ballarat Foundation's Vital Signs community portal.

Having these insights enables us to identify key actions to make positive community change. By understanding our community, we can develop actions through collaboration and connection to enable that vision.

Actions in 2023 included the creation of our Women's Fund. This fund has been established to address issues that women face such as domestic or family violence, safe and affordable rental housing for low-income earners and equal opportunities in the workforce.

In 2023, the Foundation conducted a cost of living survey. This survey was conducted across September and October and was designed to provide an insight into the impact of economic pressures on individuals and families in the Ballarat region. The Foundation is utilising information from this survey to understand areas of needs, and to help inform our decision making.

The Vital Signs community partners include: Community Bank Buninyong, Cafs (Child and Family Services Ballarat), Uniting Vic-Tas, CatholiCare and Are-able. To find out more visit: <https://www.ballaratfoundation.org.au/news/16/vital-signs>

# TAC L2P PROGRAM

The TAC L2P program creates opportunities for young people to progress from their L plates to P plates, supported by volunteer mentors who help them achieve 120 hours of driving practice. Seventy young people in the Ballarat region successfully obtained their licence in 2023 through program participation.

## L2P Case Study – Rod and Aditi

Aditi was studying Year 12 in Ballarat and living with her family who are from Nepal and have limited access to driving support.

Aditi's father is the only person in the family who has a full driver's licence and due to him working out of town, it was difficult to help Aditi on a regular basis.

When Aditi started in the L2P program, she was introduced to volunteer Rod.

After his retirement, Rod wanted to give back to community and lead a purposeful life which helps his recovery from cancer treatments.

Rod said it was tremendous to see the transformation of a young person from feeling quite nervous behind the wheel to become a comfortable and confident driver in few months' time.

Rod says safety is the key principle behind every driving session. "I don't encourage

young people to rush and get into busy roads until both of us feel comfortable about it".

He added that it was very rewarding to see a young person coming out of the drive test with sparkle in their eyes and Ps in their hand.

Aditi gained her probationary manual driving licence just before Christmas and reflected her time with L2P and mentor Rod.

She said this is the best partnership she could ever ask for.

"Having Rod who is a local expert helped me learn a lot, not just manual driving but we talked about lot of things, he always encourages and stay calm when I make any mistake. The highlight is now I have a better understanding of Aussie accent and checked quite a few op shops around different towns while taking a break for driving every two hours of a long drive day."



*Mentor Rod helped guide Aditi to achieve her licence.*





*Josephine gained confidence through mentorship with Jordan.*

## L2P Case Study - Jordan and Josephine

Jordan is working as a business analyst in Ballarat and recently moved to Newlyn.

She joined the L2P program as a volunteer mentor after she received support from her aunt with 120 hours of driving practice. Jordan wants to give back to someone in a similar need. Josephine, a year 12 student, was waiting for a volunteer mentor who could help her gain the required driving practice as she had limited access to a car.

The partnership worked well as they both had school or work commitments during the day but had spare time in the evenings to go driving. Having a L2P car located at Daylesford meant they could drive on a regular basis.

Slowly, Josephine started building her log hours, learning driving skills and gaining experience on

different road conditions. These are vital skills for youth living in rural areas.

Josephine described the program as “incredible”.

“Without Jordan and the program I wouldn’t have gained my probationary licence this quickly. It is a fantastic feeling completing Year 12 with good ATAR and gaining my licence in the same year.”

Jordan said: “I was nervous when Josephine went for her driving test, but I didn’t show it to Josephine because I knew she would nail it.”

Josephine would like to get into wildlife Conservation or Marine Biology and would like to become an L2P mentor in the future.



*Ange successfully achieved her licence in August.*

# 2023 – “THE CHANGE MAKERS”

The Volunteer Coordinators Network, chaired by Ballarat Foundation, has continued to grow, and now has more than 50 members. These members reflect diverse backgrounds such as health, disability, emergency services, aged care, education, and council. The purpose of this group is to actively promote volunteering across the region through events, training, sharing information and industry updates.

The Ballarat Foundation also chairs three focus groups to look at breaking down barriers to inclusion in volunteering.

Newly arrived migrants – in collaboration with CFA, SES and BRMC we delivered a “tech ready” session for community leaders to increase awareness of apps available to use for various emergency prevention/ planning/preparedness purposes as well for use during emergencies.

First nations - The Ballarat Foundation hosted a First Nations Cultural Awareness and Yarning Session, providing an opportunity for participants to learn, listen and engage in open dialogue. The workshop was held at BADAC with Wadawurrung Education Officer, Ash Skinner, providing insight into Indigenous perspectives.



*Barkly Square was the venue for the 2023 Ballarat Volunteer Expo, hosted by the Foundation.*

To assist the Volunteer Involving Organisations (VIOs) and to acknowledge National Volunteer Week, the Ballarat Foundation held a Volunteer Expo at Barkly Square in May.

More than 50 local organisations were represented with more than 500 visitors throughout the day including two buses from local schools. Feedback from organisations was positive with many reporting that they had volunteers sign up on the day.

Continuing with our National Volunteer Week celebrations, the Foundation hosted a morning tea at Sovereign Hill for volunteers to recognise the vital work that they do. This was attended by local MPs, councillors and volunteers and representatives from local VIOs.

# BALLARAT READS

The Ballarat Reads program promotes literacy skills through its delivery of Dolly Parton's Imagination Library books to children in the Ballarat area. By providing books to children from birth to 5 years of age, the program ensures that they have access to a variety of reading materials at an early age, which is crucial for their literacy development.

The program's approach aligns with research that emphasizes the importance of reading to children in fostering literacy skills. By building a home library for these children, the program not only encourages regular reading but also creates a positive environment that supports their language and cognitive development.

In 2023, the Ballarat Foundation supported almost 400 children through the program.



# BACK TO SCHOOL PROGRAM

The FRRR Back to School program, facilitated in partnership with the Ballarat Foundation, is a valuable initiative addressing the needs of students

## CHILDREN RECEIVED BOOKS

# 396

## BACK TO SCHOOL VOUCHERS

# 545

from economically disadvantaged backgrounds. By providing \$50 gift vouchers to schools, the program aims to alleviate financial burdens and ensure that children have access to essential items necessary for their education, such as school uniforms, clothing, shoes, bags, and stationery.

The collaboration between FRRR and the Ballarat Foundation since 2005 underscores the program's sustainability and commitment to the local community. The distribution of 500 vouchers to families across 43 primary schools in the Ballarat region in 2023, along with 45 vouchers provided to Cafs (Child and Family Services Ballarat) through matched funding, highlights the program's significant reach and impact.





# FUNDRAISING EVENTS & APPEALS

## DANCING WITH OUR STARS

After ten weeks of intense dance training and fundraising, our ten daring stars took to the dance floor in July for Dancing with our Stars 2023.

### Our Stars 2023

Lee Merrifield, Crystal Patel, Chris Radford, Danielle Walker, Tim Goode, Rebecca Patton, Sam Borner, Melissa DeCarli, Grant Newell, Stacey Berlund

The night, which is fast becoming one of the best events on the social calendar in Ballarat, was hosted by Julia Zass and Tim Bone. Judging came from the expertise of Abbey Ross, Peter Head and former Dancing with our Stars alumni, George Fong. Former Dancing with our Stars participant and judge, Mark Nunn, ran the auction.

While each of the Stars aim to impress the audience and judges with their dancing skills, more hard work is done in the lead up to raise funds for the Ballarat Foundation's charitable initiatives.

### Awards

**Dancing with our Stars Champion:**

Lee Merrifield

**People's Choice:**

Tim Goode and Helen Bloom

**Judges Choice:**

Grant Newell and Jess Rodda

In total, Dancing with our Stars 2023 raised more than \$186,000! We are incredibly proud of this achievement and so thankful to the Ballarat community, the sponsors, Shelley Ross and the team from The Dance Studio, and of course to the incredible people who volunteered to be a part of this amazing experience.



*The 2023 Stars raised more than \$186,000.*







# RUN FOR A CAUSE

Run for a Cause 2023 was a fantastic day with more than 800 runners and walkers hitting the streets of Ballarat to raise funds for the Ballarat Christmas Appeal.

Funds generated by Run are distributed to emergency relief charities in Ballarat, delivering a tangible impact on the lives of those in immediate need.

Events on offer included the 12km run, Kids' Dash, and 6km walk or run. The brand new courses included the picturesque Skipton Rail Trail, greenspaces around Lucas, and the opportunity to run down the centre of Sturt Street and through the Arch of Victory.

The event village was a buzz of activity as families sampled food, coffee, and activities by Lucas Community Garden, the Furals, face painting, the Y Games and, of course, Santa!

Thank you to our event sponsor Integra for hosting us in Lucas. Thank you to our other sponsors: The Y, Pilates Fit Plus, Showbiz Cinemas, The Athlete's Foot, Hoka, 3BA, and The Courier. And thank you to the Ballarat community for continuing to support this event.

## RUN PARTICIPANTS

802

## EVENT VOLUNTEERS

80

## EVENT ATTENDEES

1500

## PRIZES VALUE

\$15,000



*More than 800 people lined up for Run for a Cause*





## 12km Race

### Womens

Lesley West (42:26)  
 Claire Johnson (46:32)  
 Claire Broadway (47:23)

### Mens

Ben Stevens (39:45)  
 Tom Inverarity (42:05)  
 Thomas Lipkovich  
 (42:37)

## 6km Race

### Womens

Bonnie Burt (22:59)  
 Rosie Hunt (23:09)  
 Ange Cowan (23:29)

### Mens

Ben Mornane (18:12)  
 Adrian Beer (18:26)  
 Mitchell Korosec  
 (21:00)

## The Y Kids' Dash

### Girls

Claire Hutchinson  
 Isabel Hutchinson  
 Ruby Baker

### Boys

Jacob Volpe  
 Jordan Mansion  
 Jack Robinson

## Fundraising & Teams

**Highest Fundraising Team:** Lake Imaging Ballarat

**Highest Fundraising Individual:** Emma Hall

**Largest Team:** Loreto College



*Steve Moneghetti and Cathy Freeman*

## CELEBRATION OF GIVING

The Ballarat Foundation's Celebration of Giving lunch event brought together community leaders, philanthropists, and supporters, featuring an engaging conversation between Australian Olympic Champion Cathy Freeman and local legend Steve Moneghetti.

The event also featured a panel moderated by Bruce Roberts where Cathy, John McLeod, and Sarah Hardy discussed the significance of philanthropy and community engagement.

The event marked the launch of Ballarat Foundation's strategic plan, underscoring our commitment to driving positive change and fostering a stronger, more interconnected community.

The charity event partner for this event was Cafs (Child and Family Services Ballarat).

## CHRISTMAS JOY

In mid-2022, the Ballarat Foundation and radio station 3BA 102.3FM announced the stewardship of the Ballarat Christmas Appeal and Ballarat Winter Appeal would transfer to the Foundation.

The transition of the appeals will ensure the legacy built by 3BA over more than 40 years will live sustainably utilising the Foundation's DGR1 tax status and fundraising capabilities.

The appeals directly support the Ballarat agencies of the Salvation Army, Anglicare, Uniting and St Vincent de Paul with vouchers, food, toys and goods which are provided directly to community members most in need.

The community response was incredible. More than \$144,000 was raised through corporate, individual and in kind donations, with tens of thousands in toys, food, clothing and other necessities also contributed by community members.

For those contributions, we say a heartfelt thank you.

# SUPPORTERS

## DONOR STORY

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Tim Owen learned the spirit of giving from a range of sources, including the generosity of his grandpa, the workplace giving program at his first job at Australian Timken, and from leadership programs undertaken in the community.

He learned the positive impact one person can have on the community just by giving.

Following the tragic passing of his wife Janine in 2012, Tim established a sub-fund with the Ballarat Foundation in memory of Janine. For Tim it was about creating something genuinely positive in Janine's memory.

Tim's actions will have a profound effect on the community going forward.

Janine's fund has distributed more than \$133,000 to support educational programs for youth from disadvantaged areas. Janine's fund continues to bring life-changing opportunities to many.



*Janine Owen's legacy lives on through the Ballarat Foundation.*



# THANK YOU TO OUR SUPPORTERS

*For your trust in the Ballarat Foundation, enabling us to make a significant change through the impact we deliver together.*

## Major sponsors and supporters

3BA/Power FM

Adroit Insurance  
Group

Advanced Cabinetry  
Sub Fund

ARBORLEC (ARBTrack)

ArbTrack

Are-able

Australian  
Communities  
Foundation

Ballarat Clarendon  
College

Ballarat Community  
Health BCHC

Ballarat Golf Club

Ballarat  
Neighbourhood Centre

SES Ballarat

BADAC

Mercy Conect

Ballarat Lifestyle  
Village

Ballarat Safety

Barker & Jennings

Bedggoods

Begonia City Probus

Berry Street

BestaCare

BGT Ballarat Group  
Training

Black Iron Technology  
Group

Brandricks Architects

Brown Hill District  
Lions Club

Buninyong and  
District Community  
Bank

Buxton Ballarat

Cake Decorators  
Association Victoria  
Inc

Car Torque

Catholic Care

Catholic Diocese of  
Ballarat Foundation

Central Highlands  
Group Training Inc

Cheesecake Shop

Child & Family  
Services Ballarat Inc  
CAFS

Choices Flooring  
Ballarat

City of Ballarat

Clinica Lase

Collier's Real Estate

Commerce Ballarat

Committee of Ballarat

Cooke and Foley

Cotter Reid Architects

CountPro

Country Club Living

Creswick Health  
Services

Cunnington Homes

CVGT Employment

CWA of Victoria Inc  
Webbcona Branch

Daylesford Foundation

Daylesford Secondary  
College

Eason's Car Centre

Enhance 2 Empower

Eureka Concrete

Eureka Topic Club

EXUDE I.T

Field Air

Firkin Myall

G-Force

Global Health Limited

Greater Western  
Technologies

Grow

Guthrie Family Trust

Hot Temple

Hugh D.T. Williamson  
Foundation

Ignite Accountants

Ignite Accountants

Integra Operations  
Pty Ltd

Invertech Pty Ltd

J&B Jackson  
Foundation

James Kirkpatrick  
Foundaiton

Jean Goh Trust

Joyca Pty Ltd

Keystone Radiology

Kings cars

Laminex Industries

Land on Heart

Lions Club of  
Buninyong

Lucas Fire Station 68

MARS Wrigley

MasterCare

Mercure Ballarat

Midlands Terrace  
Social Club

Moss Family

Mr Brakes Bosch  
Serive center

Munro and Associates  
Conveyancing

Munro Engineers

Myke Automotive

Noel Ronan

O'Neil Transport

Peak Performance

Percy Baxter  
Foundation

Peter Stevens Motors

Phoneix Secondary  
College

Pilates Fit Plus

Plan Group	Yuille Park P-8	Pinarc Disability Support	(inc Jamie Gear Fund)
Polished Brands	Community College	Damascus College	Janine Owen Fund
Preston Rowe Paterson	<b>Ballarat Women's</b>	Laminex	Peter Amor Sports
Central Victoria P/L	<b>Fund business</b>	Ballarat High School	Participation Fund
Ray White	<b>supporters</b>	Ambulance Victoria	James Petrie Fund
Real Estate Home Loans/ Loans for Cars	Hydrant Cafe	McCallum Disability	Canny Family Fund
Red Lion Hotel	Ballarat Business Women	Services / Ballarat	Val Sarah Fund
Regent Cinemas	Ballarat Community	Regional Industries	Van den Broek Fund
Rosebank Social Activity Group	Health	Central Highlands Water	Matthew George Young
Ross Trust	Preston Rowe Paterson	G Gay Hardware	Stockman Award Fund
Sebastopol Lions Club	Central Victoria P/L	Australian Catholic	The Courier Charity Fund
Sharp Accounting	Ballarat Trades Hall	University	Wendouree Delacombe
SLF Lawyers	UFS	CatholicCare Victoria	Fund
Sportsmen's Association of Australia Inc - Ballarat	Inspire HQ	MOR Accountants	Feed Ballarat Fund
Associates	Ballarat Hospice Care	St John of God Hospital	Housing Support Fund
State Government of Victoria	Tobin Brothers Funerals	Colliers International	Rotary Young Ambition
TAC	City of Ballarat	Ballarat Foundation	Fund
The American Creswick	<b>Workplace Giving</b>	Uniting (Victoria &	Ballarat Women's Fund
The Athletes Foot Ballarat	Ballarat Community	Tasmania) Ltd	Ballarat Botanical
The Courier	Health	McCallum Disability	Gardens Fund
The Dance Studio	McCain Foods Pty Ltd	Services	<b>Corporate Funds</b>
The Inner Wheel Club of Wendouree	Barker & Jennings	Byrne Jones Torney	Advanced Cabinetry Fund
The Ryan Group	City of Ballarat	Ballarat & District Trotting	Integra Group Fund
The Y Ballarat	UFS Ballarat	Club Inc.	Adroit Insurance and Risk
Tim Beck Trust	Powercor Australia Ltd	Sovereign Hill	Fund
Timbeck Charitable Trust	CE Bartlett Pty Ltd	BGS Educational Services	
Travellers Aid	MARS Wrigley	Lake Imaging	
Troon	BRT Queens	Melba Support Services	
Tyrepower	Haymes Paint	Incorporated	
Udelivered Holdings	Ballarat Group Training	Child & Family Services	
UFS Ballarat	Gekko Systems	Ballarat Inc CAFS	
Utilise IT	UGL Ballarat	Good2Give	
Wendouree Ladies Probuss Club	TRG Accountants	Campbell, Ewen	
	FMP Group	Department of Transport and Planning	
	Loreto College	CDC / Davis Bus Lines	
	Ballarat Clarendon College	St.Patrick's College	
	OzPress Pty Ltd	<b>Named Funds</b>	
		Ballarat Foundtion Fund	



*Ambassadors: Randhir Sewgolam, Tim Bone, Fiona Murphy, Rob Croucher, Jules Zass, Lynne McLennan, Melissa Farrington, Sue Yung, Jen Pollard. Val Sarah and Pam Sutcliffe not pictured.*

## AMBASSADORS

The Ballarat Foundation Ambassadors are an influential group of leaders in our community who will advocate and inform on our behalf.

Ambassadors support the work of the Ballarat Foundation by communicating

the impact of our work, sharing the success stories and explaining why the work we do is significant to the Ballarat area.

Our ambassadors are: Randhir Sewgolam, Tim Bone, Fiona Murphy, Rob Croucher, Jules Zass, Lynne McLennan, Melissa Farrington, Sue Yung, Jen Pollard, Val Sarah and Pam Sutcliffe.



# 2024 - 2028 STRATEGY



## Key Objective #2

Improve key social indicators identified in Ballarat Vital Signs



## Key Objective #3

Establish Ballarat Community Hub for volunteering NFP collaborations



## Key Objective #4

Deliver grants and operate programs to amplify our impact and achieve our goals



## Key Objective #1

Grow philanthropic activities which return \$1 million in financial distributions

# \$1 MILLION ANNUAL IMPACT



## Key Objective #5

Enhance the people-focused organisation which applies exemplary governance

## OUR VISION

Enabling giving to build thriving communities free from disadvantage in Ballarat region

## OUR MISSION

The Ballarat Foundations inspires positive community change by supporting programs and enabling philanthropic solutions which reduce disadvantage and encourage connection cohesion and prosperity.

## FOCUS AREA

Our areas of focus are determined on creating A Better Ballarat. The Vital Signs research provides a factual base to target to areas of most local need.



Homelessness



Youth Support



Food Insecurity



Environmental sustainability



Mental Health



Family Violence



Early Childhood Support



Community equality and leadership

# BOARD OF DIRECTORS

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**Wayne Weaire**  
GAICD - Chair

Appointed to the Board in 2016, Wayne brings over twenty-three years of experience in public and private hospital, health and community care sector executive management, as well as extensive experience with public and private philanthropy and is a founding Director of Australian Community Philanthropy. Wayne is a practicing clinical family therapist and holds Board positions including Director United Way Australia, Deputy Chair of the Corrangamite Catchment Authority and he is the former chair of the Bunanyung Landscape Alliance.

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**Ian Corcoran**  
GAICD - Deputy Chair

Appointed to the Board in 2016, Ian is the immediate past Chair of the AICD Ballarat

Regional Committee. He is current Chair of the greater Bendigo Bank network of Community Banks, Deputy Chair of the Ballarat Foundation and works in an advisory role to the greater Bendigo Bank holding positions on a number of marketing committees as well as working in a mentor role for the Community Bank network. Ian brings a deep knowledge of the consumer and retail sector as well as private sector Board experience in banking, hospitality & gaming, NFP charities and golf sports industry. He is an active community member having held leading roles in Rotary, Ronald McDonald Children's Charities, Red Shield Appeal and other community organisations.

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**Nigel Jarvis**  
CPA GIACD - Treasurer

Appointed to the Board in April 2018, Nigel is Executive Director Finance & Corporate Services and Company Secretary at Western Victoria Primary Health Network. He has previously worked as Director of Commercial Operations Services St John of God Hospital Regional Victoria, Director of Business & Finance at Ballan District Health & Care and as Senior Financial Accountant for Ballarat Health Services. He is also a Deputy Chair & Treasurer of Beaufort & Skipton Health Services.

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**Scott Sherritt**  
Company Secretary

Appointed to the Board in 2022, Scott is a long-term Ballarat local with a strong commitment to the community. He has diverse qualifications in areas including corporate governance, accounting, risk management, financial planning and insurance. He is also a registered Victorian Bail Justice. With a recognition of the benefits of strengths-based development of people he has supported community improvement through work in the health sector and local government as well as through a number of not-for-profit Board and Committee positions. The Ballarat region and its people continue to prosper through not leaving people behind and giving everyone a chance and Scott is dedicated to contributing towards this continuing.



**Lee Miezis**

Appointed the Board May 2019 Lee is currently the Chief Executive Officer of the Environment Protection Authority Victoria and brings over 25 years' experience in the public sector in NSW and Victoria, working in executive roles across policy, operations, service delivery and

regulation. Accomplished at both strategy development and execution Lee brings strong commercial and financial acumen with a focus on good governance and managing risk.



**Christine Shaw**

Appointed to the Board in January 2021 Christine is a lifelong educator who has worked as a teacher and senior leader at various schools in Melbourne, Brisbane and Ballarat including Ballarat Grammar, Ballarat Clarendon College and now holds the position of Deputy Principal at Loreto College. Her professional focus has been on organisational development through leading curriculum and pastoral care, strategic planning and presenting on various education topics both nationally and internationally. Believing strongly in the importance of positive organisational culture, wellbeing and its importance in the lives of young people, Chris has a passion for creating cultures and environments that allow young people to thrive. Service empowers the shaping of character and values and as an educator, Chris enjoys being a part building positive communities.





**Emily Sweet**

Appointed to the Board in 2016, Emily is a digital news leader with 18 years of expertise in regional media and is currently the acting Managing Editor of The Courier. At a volunteer level, Emily is a member of Deakin University's Ballarat Medical School Community Advisory Board and co-chair of the Ballarat Childcare Co-operative. In 2022 Emily took to the dance floor as a participant in Dancing with our Stars.



**Jacki Whitwell**

Appointed to the Board in January 2021, Jacki is an executive leader with more than 15 years experience in the not-for-profit sector in a variety of strategic policy, research and advocacy roles working with some of Australia's largest and most respected not-for-profit organisations. She is passionate about youth empowerment and ensuring all children

and young people can reach their full potential. Jacki owns and manages her own consulting company and is completing her MBA (Social Impact). Jacki moved with her family to Ballarat in 2019 and is keen to use her skills and experience to support the local community.



**Angus Pryor**

Appointed to the Board in 2022, Angus is the Founder and CEO of Dental Marketing Solutions and Healthcare Marketing Solutions. He brings a background in small business and marketing. In 2014, he founded a multi-award-winning marketing agency using the venture to support various charities. Before his time in business, Angus held managerial positions in the pharmaceutical industry and served as a diplomat with postings in Washington and Suva. His family has a long history of serving in the Ballarat community.



**Rochelle Kirkham**

Appointed to the Board in 2022, Rochelle is a journalist with ABC Ballarat and she brings a deep understanding of social issues and a passion for helping the community to the Ballarat Foundation Board. Rochelle has been a community member of Commerce for Ballarat and completed the Future Shapers leadership program in 2021, working with stakeholders to host a forum on homelessness. She also participated in Dancing with Our Stars in 2021 and 2022.



**Catherine Ross**

Appointed to the Board in 2022, Catherine has a passion for making an impact in the community through fundraising and philanthropy. Catherine has a broad experience in the sector having had worked at Oxfam Australia, NAB Foundation, i=Change and The Reach Foundation. Catherine is committed to making a difference to the lives of others by creating change in communities.

## STAFF

**Andrew Eales**

Chief Executive Officer

**Melissa McShane-Murphy**

Finance Manager

**Wendy Kendall**

Administration Manager

**Ricci Shepherd**

Communications & Community Engagement Coordinator

**Sandi Murphy**

Donor Engagement Coordinator

**Marisa Burton**

Events & Fundraising Coordinator

**Stacey Oliver**

Community Impact Manager\*



**Padma Giri**

L2P Coordinator

**Lisa Hall**

Volunteering Ballarat Coordinator and Vital Signs Project Officer

**Rae Godfrey**

Administration Officer

\*Stacey departed January 2024.

# FINANCIAL REPORTS

## BALLARAT FOUNDATION UNITED WAY INC. STATEMENT OF COMPREHENSIVE INCOME

For the Year Ended 31 December 2023

	2023	2022
	\$	\$
<b>Revenue - Operations</b>		
Corporate Donations	9,918	12,455
Donations	189,072	253,917
Sales and Sponsorship	269,362	290,689
Government Grants	758,653	455,484
Grants - Other	234,350	129,505
Interest Received		1,617
Other Income	8,234	1,851
Profit on Sale of Fixed Assets	23,878	7,484
Rental Income		200
<b>Total Revenue from Operations</b>	<b>1,493,467</b>	<b>1,153,202</b>
<b>Expenses - Operations</b>		
Advertising Expense	(38,233)	(35,746)
Audit Expense	(11,150)	(18,500)
Back to School Vouchers	(34,750)	(47,000)
Bad & Doubtful Debt Expense	(500)	500
Book Distributions	(28,710)	(27,360)
Depreciation Expense	(28,794)	(22,705)
Distribution to Beneficiaries	(10,000)	(87,391)
Event Costs	(174,251)	(99,990)
Interest Expense	(380)	(842)
IT Expenses	(11,462)	(6,710)
Other Operating Expenses	(232,111)	(163,760)
Superannuation Expense	(64,395)	(53,593)
Training Expenses	(35,536)	(32,139)



Wage Expense	(650,974)	(552,559)
Workers Compensation	(13,447)	(10,552)
<b>Total Expenses from Operations</b>	<b>1,334,693</b>	<b>1,158,347</b>
<b>Surplus from Operations</b>	<b>158,774</b>	<b>(5,145)</b>
<b>Revenue - Sub-Funds</b>		
Corpus Donations	341,632	392,021
Investment Income	164,951	172,827
Rent	5,841	
<b>Total Revenue from Sub-Funds</b>	<b>512,424</b>	<b>564,848</b>
<b>Expenses - Sub-Funds</b>		
Depreciation Expense	(7,726)	(7,707)
Distributions to Beneficiaries	(248,795)	(249,204)
Event Costs		(1,418)
Financial Investment Fees	(25,140)	(23,132)
IT Expenses	(7,462)	(3,333)
Operating Expenses	(5,453)	(294)
Wage Expense	(65,338)	(44,139)
<b>Total Expenses from Sub-Funds</b>	<b>(359,914)</b>	<b>(329,227)</b>
<b>Surplus from Sub-Funds</b>	<b>152,510</b>	<b>235,621</b>
<b>Surplus for the Year</b>	<b>311,284</b>	<b>230,476</b>
<b>Other Comprehensive Income</b>		
Net Gain/(Loss) on Revaluation of Shares	219,179	(300,471)
<b>Other Comprehensive Income for the Year</b>	<b>219,179</b>	<b>(300,471)</b>
<b>Total Comprehensive Income for the Year</b>	<b>530,463</b>	<b>(69,995)</b>

## BALLARAT FOUNDATION UNITED WAY INC.

### STATEMENT OF FINANCIAL POSITION

For the Year Ended 31 December 2023

	2023	2022
	\$	\$
<b>Assets</b>		
<b><i>Current Assets</i></b>		
Cash and Cash Equivalents	1,536,201	908,828
Trade and Other Receivables	68,299	76,499
Investments	2,900,717	2,580,105
Other Assets	37,709	31,879
<b><i>Total Current Assets</i></b>	<b>4,542,926</b>	<b>3,597,311</b>
<b><i>Non-Current Assets</i></b>		
Property, Plant and Equipment	1,350,813	949,879
<b><i>Total Non-Current Assets</i></b>	<b>1,350,813</b>	<b>949,879</b>
<b>Total Assets</b>	<b>5,893,739</b>	<b>4,547,190</b>
<b>Liabilities</b>		
<b><i>Current Liabilities</i></b>		
Trade and Other Payables	344,176	59,406
Other Liabilities	652,135	135,394
Lease Liabilities	1,889	7,259
Employee Benefits	71,272	55,557
<b><i>Total Current Liabilities</i></b>	<b>1,069,472</b>	<b>257,616</b>
<b><i>Non-Current Liabilities</i></b>		
Lease Liabilities		1,889
Employee Benefits	20,167	14,048
<b><i>Total Non-Current Liabilities</i></b>	<b>20,167</b>	<b>15,937</b>
<b>Total Liabilities</b>	<b>1,089,639</b>	<b>273,553</b>
<b>Net Assets</b>	<b>4,804,100</b>	<b>4,273,637</b>
<b>Members' Funds</b>		
Retained Surplus	540,123	347,458
Specific Purpose Reserve	100,000	9,470
Asset Revaluation Reserve	122,779	122,779
Sub Fund Reserve	4,041,198	3,793,930
<b>Total Members' Equity</b>	<b>4,804,100</b>	<b>4,273,637</b>

**Please Note:** The Summary Statements have been derived from and are consistent with the full independently audited Financial Statements which are available on request from the Chief Executive Officer or can be viewed on the Australian Charities and Not-for-profits Commission website [www.acnc.gov.au](http://www.acnc.gov.au).

# 2023 BY THE NUMBERS



## FUNDS DISTRIBUTED

Grants: \$102,995  
 Winter Appeal: \$39,800  
 Christmas Appeal: \$105,000  
 Appeals Total: \$144,800  
 Dolly Parton Imagination Library books: \$28,710  
 Back to School vouchers: \$27,250  
 Total Funds distributed: \$303,755



## BENEFICIARIES

Primary schools from BTS: 43 + cafs  
 DPIL recipients: 396  
 Appeals: 1300  
 Celebration of Giving: 16 organisations



## DONATIONS RECEIVED

Workplace Giving contributions: \$57,568  
 Total donations received: \$540,622



## BOOKS & VOUCHERS DELIVERED

Total books mailed: 3,828  
 Total child served: 396  
 BTS Primary school vouchers: 500  
 BTS Cafs vouchers: 45



## VIOS ENGAGED

72 Volunteer Involving Organisations engaged with  
 Volunteer Coordinators Network



## L2P PROGRAM

Licences gained: 70  
 Mentors hours: 3400 hours  
 Kilometers all 9 cars covered: 172,865 kms  
 Mentors: 90 volunteer mentors through the year



## EVENT PARTICIPATION

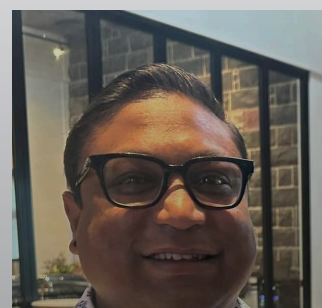
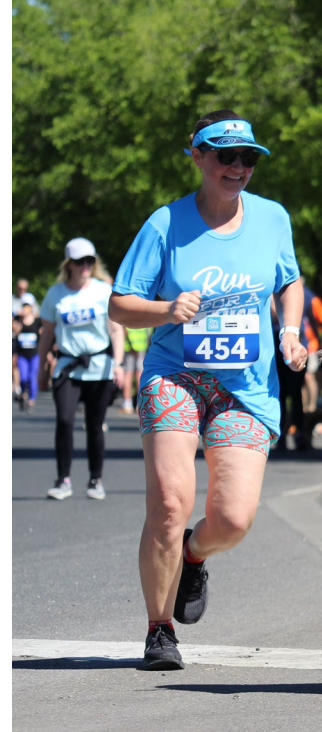
Events Fundraising Total: \$235,405  
 Dancing with our Stars participants: 10  
 DWOS Volunteers: 11  
 DWOS Gala attendees: 350  
 DWOS Volunteer hours: 900+  
 DWOS Sponsors: 33  
 Run 4 A Cause participants: 802  
 R4AC Volunteers: 80  
 R4AC Event attendees: 1,500  
 R4AC Prize total: \$15,000  
 Celebration of Giving Attendees: 148



## SOCIAL MEDIA HIGHLIGHTS

Facebook Reach: 123,630  
 Facebook New Followers: 283  
 Facebook Page Visits: 17,924  
 Instagram Reach: 22,591  
 Instagram New followers: 308  
 Instagram Page Visits: 3994  
 LinkedIn Impressions: 15, 717  
 LinkedIn Reactions: 757  
 LinkedIn Reposts: 72  
 EDMS sent: 70,990  
 EDM individual campaigns: 20





## Ballarat Foundation

7 Lydiard St Sth, Ballarat 3350

P. (03) 5331 5555

E. [info@ballaratfoundation.org.au](mailto:info@ballaratfoundation.org.au)

[www.ballaratfoundation.org.au](http://www.ballaratfoundation.org.au)



**COMMUNITY  
FOUNDATIONS  
AUSTRALIA**