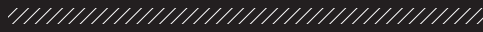


SYDNEY  
COMMUNITY  
FOUNDATION



2008



2008-09 ANNUAL REPORT

A look back over the first five years





# Sydney Community Foundation Annual report – donors July 2008 to June 2009

## **Lyndal Hutton Diabetes Awareness subfund**

Jean and Katharine  
Assarapin  
Bronwyn Bradley  
Mark Casemore  
Grace Chalmers  
Marie Cregan  
Jane Daly  
Laura-Jane Danzey  
Michelle Edwards  
Kerry Frair  
Lyn Gray  
Caroline Heathcote  
Greg Hill  
Matthew Holmes  
Steve Hudson  
Wayne Johns  
Mark Large  
Rhonda McMillan  
Peter Notaras  
Katy O'Dell  
Geoff Parsons  
Stephanie Powell  
Marie Stack  
Rosemary Timpano  
Lorraine Wardell

## **SCF Tax deductible fund**

Bruce Christie  
Dennis Doyle  
Marie Hotchkiss  
Peter Hunt  
Craig Layton  
David Lacey and  
Marian Shapiro  
Wendy McCarthy AO  
Carole-Anne Priest  
Claire Wang  
Helen Wiseman

## **Sydney Harbour Foreshore Authority subfund**

Sydney Harbour  
Foreshore Authority

## **Sydney Womens' fund**

Diane Clementson  
HCA Leadership  
Programs  
Renata Kaldor  
Keith and Judy Kay  
Macquarie Group  
Foundation  
Sophie McCarthy  
Wendy McCarthy AO  
Roche Group Pty Ltd  
Ann Sherry AO and  
Michael Hogan  
Sally Treeby

## **Ward Family Fund subfund**

Margaret Ward

## **Safe Haven fundraiser**

William Baggitt  
Christine Crimmins  
Susan Dobinson  
Mary Foley  
Jan Hatch  
Catherine Hoadley  
Jane Kenny  
Heather Kent  
Paulette Maroun  
Wendy Mason  
Kathy Merrick  
Carole-Anne Priest  
Jennie Pry  
Fiona Rankin  
Andrew Richards  
Jacquie Seemann  
Sofia Stavropoulos  
Kerry Stubbs  
Thomson Playford  
Cutlers  
Vardanega Roberts  
Solicitors  
Michelle Wilson  
Con Xiros  
Gianni Zappala

## **Learning Links fundraiser**

Adriana Feyder  
David Hardie  
Heather Kent  
Peter Nicholson  
Penny O'Meara

## **Jack Dunlop subfund**

David Hardie

## **Neil Cocks and Kellan Kent subfund**

Nina Nielsen

## **K&J Kay subfund**

Keith and Judy Kay

## Outgoing Chair's report

When we created the Sydney Community Foundation five years ago we were optimistic that the Sydney community would support us. We had examples of other international and Australian cities where community foundations were flourishing and the idea of a foundation was compelling. The first research indicated a level of community support and it is that which we have sought. It has been challenging but as I write this annual report for the 2008–09 year we can finally reflect that we have become an established part of the Sydney donor community.

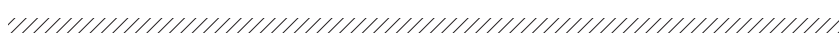
Sydney is a great city. Many of us who live here flourish but the statistics tell us that is not the case for others and we still have a significant level of poverty in our community. As a public philanthropic foundation the Sydney Community Foundation is well placed to assist donors who want to invest in the Sydney community by giving now and for the long term. It offers an opportunity to support a range of causes in their community that they care about so that Sydney can be a great, socially inclusive city.

Through the hard work of a lot of people the SCF has engaged a number of donors, built the endowment fund and delivered \$270,000 to the community of Sydney. Support has been provided to grandparents, school children, families who want to save energy, young Indigenous radio stars, basketball players, people with a disability, young people living in inner Sydney who are at risk and women and babies escaping domestic violence. The establishment of the Sydney Women's Fund recognises the importance of investing in women and their families.

I wish to record my thanks to my fellow directors, both past and present, who are very much a working board, for giving countless hours of their time, expertise, networks and donations. Each one has made an important and much needed contribution to the Foundation and I thank them for their collegiality, generosity, inspiration and good humour.

I would also like to thank the staff, contractors and volunteers who carry out the day to day work of the SCF. For the pro bono and in kind support provided by a range of specialists I am very appreciative. Finally, the SCF's funders must be acknowledged for seeing the possibilities and helping us to realise the dream.

**Wendy McCarthy AO**  
SCF Chair 2006–2009





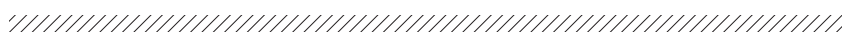
## Incoming Chair's report

I was honoured to be elected Chair of the Sydney Community Foundation (SCF) in June 2009. May I first acknowledge the outstanding leadership and enormous range of work undertaken by Wendy McCarthy, as Chair of the SCF for the last three years, and as a Director and Deputy Chair from the Foundation's inception.

The SCF is a growing organisation which serves both donors and not for profit groups who are delivering services to people across our Greater Sydney community. Together with my fellow directors I look forward to building on the achievements of the first five years as we work to build the endowment fund, provide services to an increasing number of donors who wish to create a permanent legacy for Sydney, and support small, local organisations with funding, advice and access to services.

The 2009/10 year has heralded a number of positive changes for the SCF. Thanks to the generosity of Cambooya Services the SCF has moved into new premises. 2Birds Design Group has created a new look for SCF which is well demonstrated by this annual report. We have also adopted the tagline "Community giving for Greater Sydney" — thank you for being part of our community. We look forward to working with you.

**Rosalind Strong**  
Chair



## Executive Officer report

It seems extraordinary that the SCF celebrated its fifth birthday this year. For more than a year a small steering group of four developed the vision for a community foundation for Sydney, put in place the legal and regulatory building blocks, persuaded members of the community to become board members and donors to give.

Five years on the Sydney Community Foundation has ten subfunds, over \$1,000,000 in funds under management, an expanding team of staff and volunteers and a capable and committed board of directors who have articulated the vision further for the period 2009–2011.

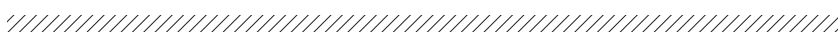
As a community foundation, we occupy a unique place. We work with both donors and not for profit organisations, providing a hub that connects across the community to build a strong and inclusive place for everyone.

Within this report you will read stories about our donors, about our community partners and about the difference that is made in people's lives when the resources of money, time, talent and ideas are applied. Many of the projects funded by the SCF are delivered by organisations about whom you may have never heard, as they don't have big marketing budgets or a large staff. They are, however, delivering much needed services to people in our community of Sydney, ensuring that the people they serve are included, engaged and valued.

The SCF would not exist were it not for the extraordinary generosity of its donors, funders, pro bono partners and volunteers. All of these contributors are acknowledged within this annual report, however, I wish to place on record my deep and admiring thanks for their contributions. As an organisation that aims to be the hub of community giving in Sydney, the SCF is itself an excellent model of what can be achieved when the talents, donations and time of a bunch of "ordinary people" (who are all exceptional) combine to apply their unique gifts.

I hope you enjoy reading this report and that it inspires you to join the SCF in continuing to strengthen our community of Sydney.

**Jane Kenny**  
Executive Officer



# Sydney Community Foundation Purpose Statement

**The purpose** of the Sydney Community Foundation (SCF) is to connect people who care with causes that matter to Sydney.

**Our vision** is a sustainable and inclusive Sydney community.

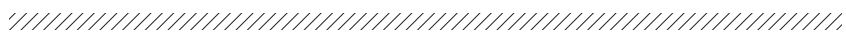
**Our mission** is to strengthen our community by connecting the people of Sydney.

## **We aim to achieve our mission by:**

- Identifying critical community issues and opportunities.
- Advocating for awareness and change on these community causes.
- Supporting and connecting people who can act on these community causes.
- Creating ways for potential donors to support these causes.

## **We operate by working to the following values:**

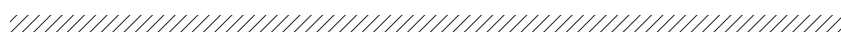
- Unifying: connecting people across sectors to achieve greater impact.
- Knowledgeable: developing a deep understanding of local issues and solutions.
- Integrity and respect: acting honestly and valuing the contribution and dignity of every person with whom we deal.
- Sustainable: making a long-term difference for our community by remaining cost effective and sustainable.
- Creative: in finding new solutions.
- Bold: aiming high to make a difference.



## What is a community foundation?

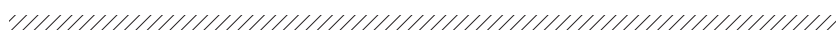
A community foundation is an independent public structure comprising a collection of donations and endowed funds established by individuals, families, companies, government agencies, local councils and charitable organisations to make a lasting difference to the life of the people in their community.

The foundation acts as the trustee for donations, and is managed by a Board of Directors made up of community leaders representing a cross section of the community. Funds donated are pooled and carefully invested under the supervision of this Board. The income generated each year from this permanent and growing investment is distributed in the form of grants. By providing leadership on issues of broad community concern and developing a body of local knowledge, a community foundation is in a position to help donors fulfil their charitable goals both during and after their lifetime.



## **The board of the Sydney Community Foundation has endorsed the following strategic priorities for the Foundation for the period 2009–2011:**

- Build the SCF's capacity to execute, sustain and grow its impact;
- Achieve a shared awareness and understanding of Sydney's needs within its community;
- Harness and leverage resources through strategic relationships with private, business, government and community partners;
- Grow the level of sustainable giving within and towards the community of Sydney and
- Support communities to solve their own needs through locally based initiatives.



# The Sydney Community Foundation is grateful for the pro bono services and government grants that have supported it in the early years. Thanks go to:

Our lawyers, Freehills

Manchester Unity/HCF, who provided space to the SCF office

Redfern Waterloo Authority, who provided space to the SCF office

2Birds Design Group, who created the SCF's new brand and design

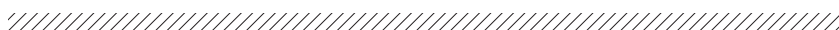
BlueChip Communication Group, who provided communications and media advice

## Funding:

City of Sydney

NSW Department of Premier and Cabinet

Westpac Foundation



**Options for giving.** The Sydney Community Foundation connects the community by linking donors with community organisations. By making a one off donation, establishing a subfund or leaving a bequest, you can support the community you love. You may also like to set up a regular donation from your account, paid on a fortnightly or a monthly basis.

### Types of Funds

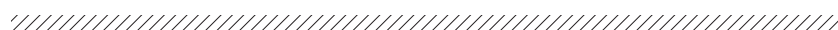
Donors have the choice of a number of funds:

- The Sydney Community Foundation Tax Deductible Fund which provides full tax deductibility for all money contributed. The interest earned from this fund is directed by the Board of the Foundation to authorised charitable institutions with deductible gift recipient status.
- The Sydney Community Foundation General Fund is a non-tax deductible fund. Gifts from this fund can be distributed for more general charitable purposes or according to specified wishes by their donors.
- The Sydney Womens Fund which provides full tax deductibility for all money contributed. As this subfund grows with donations, the interest that it earns will be directed by the Board of the Foundation to authorised charitable institutions with deductible gift recipient status who are providing services that support women and girls.

The Sydney Community Foundation Board acts as trustee for all funds. For investment purposes all funds are pooled, but accounted for separately. Investment of the SCF's funds is done in accordance with strict policy guidelines set by the Board and overseen by the investment committee of the SCF Board.

### Establishing a subfund

For further information on how a subfund can be established, please contact the SCF office.



## Bequests

After providing for family and friends in their Will, an increasing number of people are considering leaving a proportion of their estate to help others in their local community.

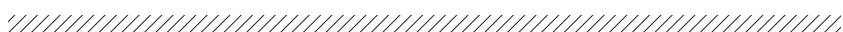
The Sydney Community Foundation offers an ideal way to leave a bequest in your Will that will take account of your funding wishes and be carefully managed to benefit local people in your community forever. It will also associate your name with the community you lived in and loved.

There are a number of different ways in which you can leave a bequest to your Community Foundation. For example:

- A pecuniary bequest is a fixed amount specified in your Will.
- Gifts of shares or property are exempt from capital gains tax.
- A residuary bequest is the remaining value of your estate when all other bequests to family and friends have been made and your liabilities have been paid.
- A reversionary bequest allows a surviving partner to benefit from your estate during his or her lifetime and then for the balance of the estate to be paid to the Community Foundation on their death.

If you wish to make a bequest to the Sydney Community Foundation, we advise you to speak to your solicitor, who with us, will assist you to draft the terms of your gift.

For more information about making a bequest to the Sydney Community Foundation, please contact the SCF office.



# Sydney Women's Fund of the Sydney Community Foundation

## “Sydney women helping other Sydney Women — providing the road to opportunity”

The Sydney Women's Fund (SWF) of the Sydney Community Foundation was launched by the Governor of NSW, Marie Bashir AC CVO, in November 2008, at Government House. The SWF was established by the SCF in response to continuing evidence that shows that women in Sydney are prevented from reaching their full potential through lack of opportunity.

### The SWF believes that:

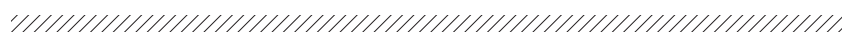
- Investing in women means investing in families. Investing in families means investing in communities.
- Smart and wise women want to help other women.
- Small initiatives can have big results.
- Change starts at the grassroots.

The Sydney Womens Fund will provide financial support to projects led by women that seek to overcome barriers faced by women and girls. Through fundraising and raising public awareness, the SWF aims to touch the lives of women whose needs are not met by the government or the marketplace. It will do this by supporting organisations which do not attract mainstream support with a focus on education, personal safety and preventative health.

### The SWF aims to grow the endowment fund by focusing on three main areas of fundraising activity:

- Donations from young professional women, corporate sponsors who see value in supporting Sydney's women, and girls schools.
- Partnerships with corporates and other foundations.
- Endowments and bequests.

More information or donation forms can be obtained from the SCF office or [www.sydneycommunityfoundation.org.au](http://www.sydneycommunityfoundation.org.au).



Over the next few pages, we bring you stories from some of the donors to SCF subfunds. Learn why they have chosen to donate to the SCF and the impact their donation has on the people and organisations they are helping.

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# STORIES FROM SYDNEY COMMUNITY FOUNDATION (SCF) SUBFUND DONORS



## Story from a subfund donor: **David Hardie,** **Jack Dunlop subfund of the SCF**

"I established a subfund of the Sydney Community Foundation (SCF) in 2005, when I first heard about it and its model for giving.

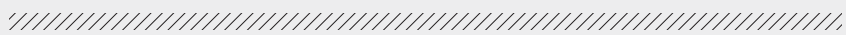
I received an inheritance from my grandparents (who raised me) and I wanted to do something important that would respect their legacy. I wanted to ensure my investment would be managed properly and I knew SCF would be the right place.

The first grant made from the subfund that I established was to COTA NSW for the Grandparents Raising Grandchildren initiative. It is a project that I am very pleased with and since 2005 I have recommended the grant be renewed several times. This program supports grandparents in Sydney who have acquired the full time care and responsibility of their grandchildren.

I am also interested in supporting the work of organisations supporting refugees. In 2008 a grant from the subfund I established was made to ICE (Information and Cultural Exchange), which engages and supports the diverse communities and artists of western Sydney to express, create and collaborate on media and art projects. The grant made is for a project called Digital Refuge, in which young refugees create digital art to tell their stories.

Over time, I would like to make a difference in the lives of marginalised people through the inheritance I received."

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



## Story from a subfund donor: **Catherine Christie,** **Youanmi subfund of the SCF**

"I established a subfund with the Sydney Community Foundation (SCF) twelve months ago.

I fortunately inherited some money and thought it would be a great opportunity to do something positive.

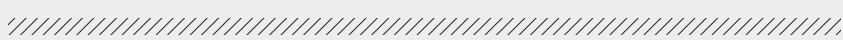
Eating disorders is a field of interest that I wanted to support. This illness can consume the whole family life and unfortunately there is little available with treatment. There are few specialists in this field with too many clients. As a result of this, waiting lists are very long.

There is also a lack of government funding for eating disorders. It would be great to see a change that over time more people would invest and donate so that more treatment facilities and programs can be established. This would enable people with this illness to receive the proper treatment they require.

My long term vision would be to first raise awareness of eating disorders; that it is in fact a mental illness and it is not something that can easily be healed. As a result of generating more awareness and the need for assistance and continual research, it may trigger people to become more involved with investing, donating, volunteering and being able to establish more facilities for this illness.

I have been involved with The Butterfly Foundation as a volunteer, which supports Australians with eating disorders. With funding from the SCF, Butterfly has been able to employ a part time administrative assistant. This has really aided the capacity of Butterfly, allowing the staff to create more realistic goals and implement improvements to eating disorder awareness and treatment programs."

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



## Story from a subfund donor: **Heather Kent, Neil Cocks and Kellan Kent subfund of the SCF**

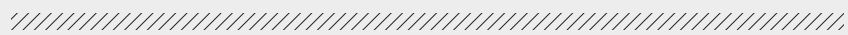
"I have been a donor to the Sydney Community Foundation for about three years.

The "Neil Cocks & Kellan Kent Subfund" was set up in memory of my son and husband, who were killed in a gliding accident. My son had a learning disability and therefore the focus of the subfund is to support projects for children with learning disabilities.

Whilst I and my husband were in a good financial situation to support our son with his learning disability and we also had the time to work with him, there are many families out there that cannot. I can't help my son anymore, but I can help other children with learning disabilities by supporting projects that aid disadvantaged families in this area. This education is important for both the child and the parents.

I believe it is really important to work with children and their parents as soon as possible in their life, as the earlier the disability is detected, the better chance the child has to overcome or at least learn to work with their challenge. Over time, I would like more effort put into the public health system to help detect any potential learning issues for very young children. In particular, more occupational therapy should be available to all families that request it.

As time goes on, I would like to work with other philanthropists that are interested in projects which support disadvantaged children with learning disabilities. As the SCF is a public foundation, open to all donors, I would encourage others who have a passion in this area of focus, to contribute to this fund. Something that is very important to me is to have my twin girls become engaged with community giving and be involved with this subfund, as they grow up. I would like to think that they will want to expand from this subfund into other areas that interest them and they would like to support."



## Story from a subfund donor: **Bruce Christie, L'Envolee Vitale subfund of the SCF**

"I established a subfund with the SCF about three years ago, because I felt that this was a strategic way to give. The SCF focuses on providing support to organisations working in the area of eating disorders, a subject that is not well understood in our community and for which support organisations struggle to find donors.

There is very little research and support services for people with eating disorders, and their families. It is an extremely challenging area to work with and it is difficult for trying to understand the issues, particularly for those not directly affected by the illness. There can be a view that the person with an eating disorder is being difficult and that it is the fault of the parents. This is not true — it is a genuine illness. Eating disorders affect all sorts of people: males and females of all different age groups and across socio-economic and cultural backgrounds. Eating disorders are the most common chronic health problem affecting young women in Australia, after obesity and asthma.

A grant has been made to The Butterfly Foundation, which provides support for Australians who suffer from eating disorders and negative body image issues and their carers through a range of very well used services. This grant helped Butterfly to employ an administrative assistant which frees up the CEO to spend more time on the bigger issues."

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



Over the next pages there are stories from some of the SCF's successful grant recipients. They are all inspirational examples of how the SCF is making a profound difference to the lives of people in Sydney.

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# STORIES FROM SYDNEY COMMUNITY FOUNDATION (SCF) GRANT RECIPIENTS

# Grant recipient: **Council on the Ageing New South Wales (COTA NSW)**

“COTA was formed in 1951 and is the leading organisation for seniors in Australia. COTA protects and promotes the well being of all seniors. Through COTA NSW, GRG and Grandfriends programs were initiated.

GRG NSW represents an alliance of grandparents who have fulltime care and responsibility of their grandchildren across NSW. This program recognises the struggles that grandparents may go through such as energy drain, financial and legal difficulties. This program is also designed to provide support for grandparents with information, resources and a place to share stories.

Grandfriends is the creation of Iris Wallis in 1997, who arranged a group of seniors in her local area to visit local primary schools, to help teachers in their classrooms. This program aims to develop relationships between the youth of the community with the older generation. This program enables youths and seniors to learn, understand and respect each other; ultimately bridging the gap.

Approaching SCF enabled COTA to reach its specific focus with GRG. The donations from SCF were initiated by a grandson in remembrance of his grandparents who raised him.

Since SCF and COTA NSW have had successful results in the past (GRG), COTA NSW members presented the Grandfriends program to the SCF Board and funding was agreed to and granted in 2007.

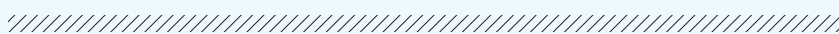
The GRG website and information package was created with the funding from SCF. The website is a resourceful tool for its participants and the community. The information package is very useful to grandparents seeking knowledge and support. The information package contains a variety of key resources such as help-lines for new grandparents raising grandchildren.

In addition, with the SCF funding COTA was able to hire an individual to maintain and develop the growth of the program.

SCF’s funding for Grandfriends went towards the extension of the Grandfriends Project in the Campbelltown area. Specifically, the funding was used for the coordination and development of the program which included promotion advertisements and presentations to local groups.



**Project:**  
**Grandparents  
Raising  
Grandchildren (GRG)  
Grandfriends**





**Some of the outcomes from the two projects have been:**

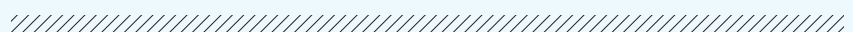
- The website led to the awareness and growth of GRG.
- Funding has raised the profiles of GRG and Grandfriends.
- The project has continually grown with more schools participating in the Grandfriends program.
- Due to the amount of funding and participation in the Campbelltown area public awareness of the project has increased substantially.

The networks of GRG have grown demonstrating great progress with continually moving forward and building on new and existing relationships.

COTA (NSW) is currently in the process of developing a new GRG website that will improve the existing information and support. Furthermore, the new website will be able to enhance the connection of pre-existing grandparent support groups across New South Wales through the use of blogs. The new website will be live by the end of this year."

[www.cotansw.com.au](http://www.cotansw.com.au)

[www.raisinggrandchildren.com.au](http://www.raisinggrandchildren.com.au)



## Grant recipients: **Merry Makers Australia**

“Merry Makers Australia runs dance classes for the intellectually and physically disabled to develop and express themselves through the power of music. Its purpose is to promote the self esteem of children and adults with intellectual and physical disabilities through motivational movement therapy using music, song and dance.

Merry Makers also provides a sense of belonging to those children and adults and promotes an exciting alternative to everyday work and the difficulties they encounter in maintaining a satisfactory lifestyle.

At the recommendation of a donor to the SCF, we were approached to submit an expression of interest for funding. It is unusual to be invited to apply for funding and the request came at just the right time as we were fielding a multitude of requests for assistance to set up community dance programs just like ours all over the place.

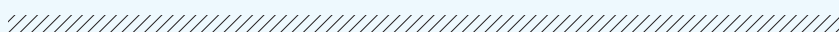
With a grant from the Neil Cocks and Kellan Kent subfund of the SCF of \$9,650 we supported three communities to get up and going with a dance program for people with disabilities. While we wanted to inspire people to take our example and were happy for them to use our model, we thought it was important that they be able to create their own form of Merry Makers within their community. The structure and format varied depending on the needs of those involved.

DanceAbility, Dance Chance and Dance Oolites are now running classes in their local areas for people with disabilities, in a safe, fun and caring environment.”

[www.merrymakers.com.au](http://www.merrymakers.com.au)



**Project:**  
**Community dance  
programs for the  
disabled**





Project:  
**Midnight Basketball**

## Grant recipient: **Midnight Basketball Australia**

“Midnight Basketball was established in Australia in 2006 as a community-based organisation that influences and engages youth aged between 12 and 18 years of age. The program is free and runs twice a year, eight weeks each time, every Saturday from 7:30 pm to midnight (the highest risk period of the week).

Upon arrival the participants receive a nutritious meal and are required to attend the scheduled workshop for that week prior to starting basketball. “No Workshop, No Jump Shot” is the motto. These workshops are important as they build on life essential skills. The workshop topics vary each week and can include; Nutrition & Health, Making Positive Choices, Self Esteem & Confidence Building etc.

Once the evening has come to an end the Midnight Bus takes the players safely to home to their front door, happy and exhausted.

In our very early days of setting up the program in Australia, the Sydney Community Foundation (SCF) was approached for funding because being a community foundation, we knew that they were more likely to bravely fund new and unrecognised programs.

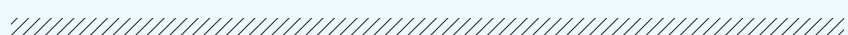
With SCF’s funding Midnight Basketball was able to hold their first two tournaments (held in Redfern). The funding also went towards the “Circa Survey”, an independent assessment by Cultural and Indigenous Research Centre Australia. This survey was given to all participants at the end of the eight-week program. This survey was created to get opinions and input about Midnight Basketball.

The first two tournaments were a success, which gave Midnight Basketball the confidence and ability to approach other potential sponsors. The Circa Survey has been a useful tool for tweaking the tournaments by feedback from the respondents. Midnight Basketball has since used the Circa Survey for every tournament.

With the success of the first two tournaments Midnight Basketball was able to approach other potential sponsors. The Commonwealth Bank is now a major sponsor. The grants and sponsorship have aided to sustaining this program.

Midnight Basketball has gained attention in the media (Channel 7 News Report, ABC Stateline Story, Night Time Out Documentary, Playing in the Shadows film) and as result public awareness of the organisation has greatly risen.

Midnight Basketball has grown substantially since 2006. By the end of 2009 there will be 53 tournaments held across Australia.



## Grant recipient: **Monkey Baa**



**Project:**  
**I Am Jack**

"Monkey Baa is a Theatre for Young People that was established in 1997 by three actors (Tim McGarry, Sandra Eldridge and Eva Di Cesare). Based in Sydney, this organisation produces high quality theatre productions from well-profiled authors in Australian literature.

Monkey Baa has a distinctive relationship with its audience by sharing skills from the creative team through comprehensive and inventive workshop programs.

"I Am Jack", one of Monkey Baa's performances and funded by the Sydney Community Foundation (SCF) is a one-hour theatre production that tackles the issue of bullying; how it develops, its impact on those bullied and ways the problem can be dealt with.

Monkey Baa wanted to develop a unique production "I Am Jack" that would be geared towards children between the ages of 8-12. The play is based on the book of the same name by Susanne Gervay, an Australian author who wrote about her son's experience of schoolyard bullying, and how his family and friends helped him to solve the problem peacefully.

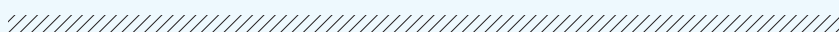
With the funding from SCF the I Am Jack production was developed (logistics, script, rehearsals and touring). Monkey Baa was able to develop a powerful performance that can educate young people and stimulate peer discussions about bullying. Performances were given at the Seymour Centre in Chippendale and attended at no cost by children from local schools, many of whom had never experienced live theatre before.

This production then went on to tour Australia at numerous schools free of charge.

By the end of the funding in September 2008, I Am Jack was performed 37 times at 13 different locations within NSW. There were also requests to bring the performance back to several locations the following year.

In addition, Monkey Baa has received great feedback from that production through their website and audience feedback at the end of each performance.

SCF was the "seed funding" to this production as the organisation assisted to get the project off the ground. Since the funded has ended the I Am Jack production has continually grown within Australia and will perform nationally for the first time in 35 different locations by 2011.



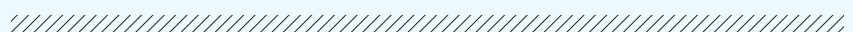


I Am Jack has grown larger (number of performances, areas of touring) than any other production at Monkey Baa. Unfortunately, bullying by both children and adults continues, so being able to tackle this issue creatively and offer children some options for handling it is important."

[www.monkeybaa.com.au](http://www.monkeybaa.com.au)

*The stage production of I am Jack was absolutely fabulous. I really still can't believe that I was able to bring 60 students and teachers to a "free" performance to be able to be transformed into the world of Jack, to meet the author and to come away with lots of discussion going on in our heads to link the book with the live performance. Thank you so much, thank you to your beneficiaries who obviously realise that presenting live theatre to students who otherwise would not be able to access it is so important. I did a shared reading novel study unit with Yr 5 and 6, we summarised each chapter, came to the end and wrote a dialogue between two characters where the exposure of bullying was the topic and then looked at alternative endings to the book. As a teacher I found your programming sheets very valuable. Thank you for bringing literature to life!*

**Maree Ancich** — Our Lady of Mount Carmel Waterloo



# Sydney Community Foundation (SCF) Board of Directors



## Patron:

Her Excellency Professor Marie R. Bashir AC, Governor of NSW

## Chair:

**Rosalind Strong** was elected Chair of the SCF in June 2009. She also chairs Museums and Galleries NSW, the key development agency for the museum and gallery sector in NSW. She has served on a number of government and not for profit Boards, including the Australia Korea Foundation, the Board of Adult and Community Education, the University of Sydney Union Foundation, the Council of Sydney Teachers' College. She was the President of the Asthma Foundation of NSW from 2001–2008 and President of the Australian National Committee for UNIFEM (UN Development Fund for Women) from 2006–2008.



Ros worked for 35 years in the NSW Public Sector, retiring as Director of the NSW Heritage Office in 2002. Prior to this she worked in education, particularly in migrant and multicultural education at secondary level, and ultimately as Assistant Director General with responsibilities for apprenticeships, employment programs, adult and community education and adult migrant education.

## Deputy Chair:

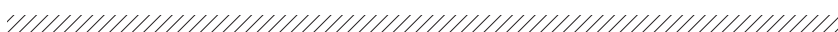
**Sally Treeby** spent almost 20 years with leading financial services organisations in Australia and the United Kingdom holding senior positions in the areas of strategy, marketing and line management. Sally's most recent corporate role was Head of Consumer Marketing at Westpac Banking Corporation. Since early 2003, Sally has been actively involved in the not for profit sector including volunteer roles as a Board member of Food-Share Australia and on the Corporate Event Committee for The Humour Foundation (Clown Doctors).



In 2005 Sally identified a new generation of philanthropists seeking assistance to establish a strategic approach to their personal giving. This resulted in the establishment of new philanthropy, a consulting service to help individuals and families connect their passions with their capacity to achieve sustainable social change.

## Directors

**Phillip Black** is Deputy Mayor of the City of Sydney and the Lord Mayor's nominee on the SCF Board. Phillip is a Surry Hills businessman in the tourism industry. In 1993 he helped to establish the South Sydney Heritage Society. He is currently a Governor of the Centennial Parklands Foundation and formerly a Trustee on the Centennial Park and Moore Park Trust. Phillip is a long-time advocate for protecting built heritage and open space.





**Lucinda Brogden** is a former Associate Director at Macquarie Bank. During her tenure at Macquarie, Lucy worked in Human Resources, Corporate Communications and Corporate Strategy. Before joining Macquarie Bank, Lucy worked for Ernst & Young and Ministers in the Greiner and Fahey Governments.

Lucy holds a Bachelor of Commerce Degree from UNSW and a Graduate Diploma in Psychology from Macquarie University. She is a patrolling member of Bilgola Surf Lifesaving Club.



**Bruce Christie** is a Certified Financial Planner with Centric Wealth Advisory and has 21 years experience assisting individuals and families. During this time Bruce has provided financial advice to a major Australian charity. Bruce is a member of Rotary.

Bruce holds a Bachelor of Engineering and Master of Business Administration from Macquarie University. He also has a Diploma of Financial Planning.



**Dennis Doyle** has extensive experience in leadership of significant organisations in the not for profit sector and technology sectors. He founded an IT professional services and software organisation, which grew to be one of Australia's most successful and profitable businesses in its field. Most recently he was Executive Director of Young Achievement Australia, an organisation that teaches young people business enterprise skills. Dennis has acted as an adviser to the Premier of NSW as a member of Youthforce NSW.



**Michael Hogan** is the Managing Director of Hogan Advisory, a recently formed public relations consultancy. Michael is a highly experienced public relations practitioner with broad client experience in Australia and New Zealand.

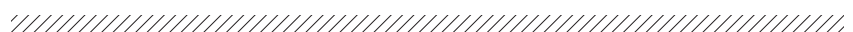
Michael has worked in his own consultancy and within corporate public relations companies for the past 15 years. Prior to this he held executive public affairs and communications roles in the Australian Telecommunications industry and Australian cricket.

His working experience, both as client and service provider, traverses the environment movement, SME sector, Government policy advisory and liaison — state and federal, political advisory, the aboriginal sector, financial services and investor relations, legal services, the tertiary education sector, venture capital and property portfolios.



**Lisa Hudson** is the Chief Executive and Publisher of Fairfax Magazines and is one of the most senior women in Australian publishing today. In her role she is responsible for six titles across Sydney and Melbourne with a combined readership of nearly 5 million people.

Lisa has worked on Fairfax magazines since creating and launching the(sydney)magazine as Editor in 2003. Since joining The Sydney Morning Herald 12 years ago, she has edited the Travel and Good Living sections, and co-edited The Good Food Guide for three years. She is a member of Fairfax's Editorial Board, created to shape the strategy for the development of Fairfax newspapers.



**Heather Kent** is a founding member of Sydney Community Foundation. Her career spans twenty years in the corporate arena, mostly running IBM Australia's national security business, as well as work for community organisations serving children, family welfare, advocacy and philanthropy.



**Carole-Anne Priest** is a lawyer with extensive experience as a solicitor and advocate, particularly within the insurance industry, both in Australia and internationally. She was the NSW Telstra business woman of the year in 2007 and the 2007 NSW Hudson Private and Corporate sector award winner. Carole-Anne also has a long history of volunteer work, most recently with Vincentian Village in East Sydney, where she established a free legal service for homeless people, and has also done some work in the counselling of refugees. Carole-Anne is a Director of and honorary legal adviser to the Kokoda Track Memorial Walkway.



**Andrew Richards** was born and educated in Wales. He joined BP in London as a commercial trainee before migrating to Australia in 1969 and joined Jetset Tours which became the largest travel company in Australia. His positions included MD of Jetset in New Zealand (1985–88) and later the UK (1988–1992). In 1995 Andrew was appointed Regional Director for Europe, South Africa and the Middle East for Tourism Australia and was responsible for the marketing of Australia as a holiday destination. He returned to Australia in 2002 and joined Mission Australia to help set up and develop a team to capitalise on the changing attitudes towards Corporate Social Responsibility. By March 2007 the organisation had established over 40 corporate partnerships. Andrew is now semi-retired and a member of the Advisory Council for the Sydney Youth Orchestra.

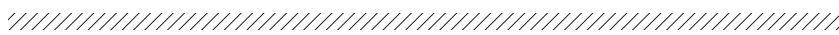


**Justine Waters** is the Head of Health Leadership for Bupa Australia Group (comprising MBF Australia and Bupa Australia) where she is responsible for the planning, development and delivery of Group's strategic directions in health leadership in the health care sector and public health arena. Her portfolio also includes the MBF Foundation. Justine joined MBF in 2006 as the Head of the Office of the Chief Health Medical Officer where she was supporting the Chief Medical Officer and Business to achieve its vision of being the national thought leader in health and wellness.



Justine has over 15 years diverse health experience as an academic, researcher, strategic planner, policy-maker and senior manager. She has held senior positions in public, private and not for profit organisations.

Prior to joining MBF, Justine was on the senior executive team of the then Northern Rivers Area Health Service (NSW Health) as Director, Population Health, Planning and Research. During her over twelve years in NSW Health she also held senior management positions in the areas of population and public health, corporate communications, health policy and reform as well as research and development.



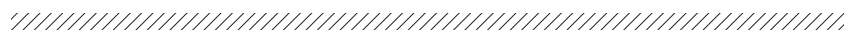


**Helen Wiseman** is a Chartered Accountant and has spent 21 years both in the UK and Australia advising large multinational corporations. Helen spent 14 years at KPMG including at partner level where she specialised in corporate tax in the energy and resources sectors.

Helen is deeply committed to serving the Australian community. Helen is the Chair of SHINE for Kids, a community-based organisation that supports children of prisoners. Helen is also a Director of the Melanoma Institute of Australia. Helen is a former volunteer telephone counsellor and is currently completing a Bachelor of Science in psychology, complementing her financial skills and business experience.

**Past directors:**

- Elsa Atkin
- Graham Bradley
- Christopher Breach
- Bill Downing
- Marcelle Hoff
- Michael Gill
- Wendy McCarthy AO
- David O'Connor
- Neville Roach
- Alex Smith AM
- Bob Sutton
- Lynette Thorstensen



## SCF staff and volunteer profiles



A small team of talented and hard working people keeps the SCF office and its operations ticking!

### The SCF former staff and volunteers are:

**Heather Kent** was one of the founders of the SCF and served as its founding CEO. Heather is now a donor to the SCF, having established a subfund in memory of her husband and son. She is also a director of the Foundation.

**Ingrid Aitken** was CEO of the SCF from 2005 to 2007. In that time Ingrid moved the SCF into its first official premises, which were hosted by the Redfern Waterloo Authority. Ingrid implemented a number of initiatives at the SCF, in particular overseeing the successful funding of a number of community projects and initiating the professional advisers network.

**Claire Wang** started with the SCF as a volunteer, entering data, and later worked for the SCF as an administrative assistant.

### Current staff, contractors and volunteers

**Jane Kenny** is the SCF's current Executive Officer. Previously Jane managed the Sydney office of Philanthropy Australia, growing Philanthropy Australia's membership in NSW and managing membership services. In her current position, Jane manages all aspects of the Sydney Community Foundation's operations, in particular working with donors to establish subfunds, distributing funding to community organisations and growing the Foundation's endowment.



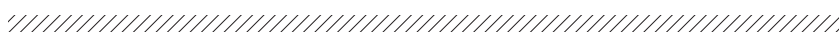
Jane is a director of the Documentary Australia Foundation, a philanthropic foundation which brings together philanthropic grantmakers, charities and film makers to create a community that can make a difference through documentary.

In her spare time she loves to read and cook, and writes a recipe blog for her friends.

**Coty Cortese** is the SCF's Grants Manager. Coty's varied and interesting career includes working for organisations such as the Department of Defence, the Australian Trade Commission and Telstra, in roles that have covered finance, research, exporting, marketing and contract management, including a short term assignment overseas.



Whilst working at Telstra, Coty was seconded from her senior marketing role in 2000 to assist in preparing the business case for the establishment of the Telstra Foundation. In early 2003, she was involved in assisting Dymocks Booksellers to establish their Childrens' Literacy Foundation as Operations Manager.



From 2004 to 2008, Coty was the Executive Officer at the Mary Potter Trust Foundation, which provided grants to community groups across Australia that actively work towards addressing the human rights and social justice needs of the disadvantaged. Coty has been on the Management Committee of Changemakers Australia since 2005. Coty has always been passionate about giving back to the community. She has been involved in the not for profit sector for many years in a volunteer capacity.



**Daphne Royds** is the SCF's Bookkeeper. Daphne has a formal education in accounting and commenced her working life as a bookkeeper. She then entered the IT industry as a Project Manager and subsequently General Manager of a branch of an international software house where she spent 15 years implementing and upgrading financial software packages for medium to large clients. Daphne has since registered her own business, Laroy Business Services, offering clients IT consulting, bookkeeping and financial accounting services.

Daphne spends her leisure time gardening and walking.

**Sara Alemi** volunteers one day a week for the SCF, managing all aspects of event co-ordination.

Before arriving in Australia from Iran, Sara worked for the German chamber of Commerce and Industry as an event co-ordinator. Sara has an academic background in the arts, and has recently established her own photography and graphics business, PIXSARA.

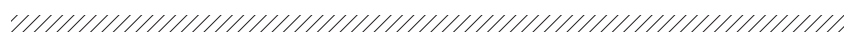
Sara loves learning foreign languages, playing tennis and cooking.



**Catherine Brown** volunteers one day a week for the SCF, administering its grants program. Catherine's employment background is in arts management and fundraising within the cultural, education and environmental sectors. Her academic experience includes a Masters from Monash University in Material Culture and Museum Studies. Currently Catherine sits on the Board of the award-winning Flying Fruit Fly Circus which is the national youth circus arts training company. In her free time she is a keen traveller and frustrated but aspirational rower.

The SCF is also fortunate to receive skilled assistance and advice from a number of people across the community for individual projects. They are willing to share their expertise and experience with the Foundation.

To all these people, the SCF says a sincere thank you.



# Sydney Community Foundation Grants Program

## **In order to achieve its purpose, the SCF invests in projects that:**

- Create social change in the greater Sydney area.
- Pioneer responses to community need.
- Focus on prevention or early intervention.
- Are sustainable and replicable.
- Develop the community's and service providers' skills, knowledge and engagement.

## **The SCF considers proposals in these areas:**

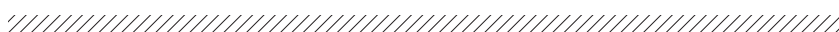
- Young people at risk.
- Young families.
- Indigenous and culturally diverse communities.
- Women.
- Supporting older people.
- Initiatives promoting environmental sustainability.

As the SCF was created to benefit the community of Sydney, it will only provide funding for initiatives and projects that are delivered within the Sydney region (generally speaking, this region is bordered by the Hawkesbury to the north, the Blue Mountains to the west, Camden to the south west and the Sutherland shire to the south). The SCF prefers to fund smaller, grass roots organisations that work towards improving the wellbeing and social inclusion of people who live in Sydney, even in small ways. It is happy to be one of a number of supporters of a project and will undertake co-funding in conjunction with other organisations to ensure the success of a project.

## **Grant Exclusions:**

### **Grants will not be made for:**

- Religious or political causes.
- Projects for building traditional infrastructure which is the responsibility of government.
- Fundraising costs and annual appeals.
- Sporting projects where sport is the principal purpose.
- Emergency relief, except where a major crisis affects the Sydney community.
- Eligibility.



The SCF welcomes applications from a diverse range of non profit community organisations, for projects meeting some or all of the above criteria. Applicants need to have Tax Concession Charity (TCC) endorsement from the Australian Tax Office (ATO), and Deductible Gift Recipient (DGR) endorsement from the ATO, if applicable.

### How to apply

Firstly, applicants should call the SCF to check that the proposed project is something that would be considered for funding. It is strongly recommended that phone contact is made before preparing an application.

Secondly, an expression of interest (EOI) should be emailed to the Foundation with a copy of the organisation's DGR and TCC endorsement notices from the Australian Taxation Office.

### Grant amounts

Funding levels are flexible and guided by the specific needs of projects and funding availability, however grants generally do not exceed \$20,000.



Deputy Chair of the SCF, Sally Treeby, presenting a cheque to Monkey Baa Theatre for Young People.

# Investment policy

## Overview

The Sydney Community Foundation (SCF) is Trustee of all funds established to receive money and assets donated from the public. The Board of the SCF is ultimately responsible for the prudent management of all SCF funds. The Board has appointed an Investment Committee of three directors to assist it to fulfil its fiduciary obligations under the SCF umbrella.

The SCF aims to manage all funds prudently, in accordance with sound investment principles, so as to optimise the return generated on funds invested, while maintaining a prudent investment risk profile.

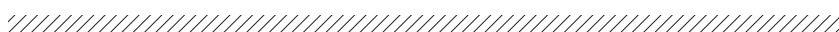
### In addition to meeting the fiduciary responsibilities, this investment policy:

- Demonstrates to individual and corporate donors and benefactors that the SCF is a competent steward of money it receives.
- Defines the criteria against which the committee can evaluate investment performance relative to accepted market indices.
- Provides a roadmap for new Board members and/or committee members to ensure continuity of effective management within the SCF.

### The money and assets donated by the public are used in three distinct ways:

- **Flow through:** donations are allocated to selected charities within a short time frame, i.e. less than 12 months.
- **Administration:** grants and fees are employed to ensure the continuing, efficient operation of SCF. Again such funds are used within 12 months.
- **Endowment:** donations are invested to preserve capital for the future and income earned from the investment of this capital is allocated to selected charities.

Accordingly the investment policy will address two distinctly different investment time frames; short term for “flow through” and “administration” funds and long term for “endowment” funds.



## Objectives

An appropriate investment policy will assist with the achievement of several key objectives, which include:

- Return.
- Risk.
- Liquidity, or access to capital.
- Ethical investments.

## Procedures

### Flow through and administration funds

#### a) Satisfactory return

Given the short term investment time horizon of capital allocated for “flow through” and “administration”, the investment objective should be to achieve a satisfactory return commensurate with the 90 day Bank Bill Index.

#### b) Acceptable risk profile

To limit investment risk, investments should only be invested in investments with an AA credit rating or better.

### Endowment funds

#### a) Return

With a long term investment time horizon, the objective for “endowment” funds should be to achieve a return above inflation so that the capital will grow in “real” terms.

It is proposed that the target “long term” return should be inflation plus 4%.

#### b) Risk

It is noted, that to increase potential return, an investment portfolio must assume a higher level of volatility (fluctuations in capital) in the short term.

It is also noted that, the “risk” associated with lower volatility gives rise to a reduced probability of capital loss in the short term, but, equally, a greater probability of capital loss in the long term.

Hence, it is acceptable for the portfolio to achieve a negative return for one in five years.

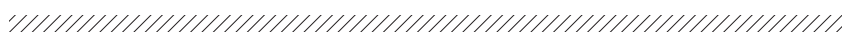
#### c) Liquidity

As funds are to be invested for the long term, there is no need for a high level of liquidity.

#### d) Asset allocation

Research confirms the inability of forecasts to predict how investment markets will perform in the future.

Furthermore, the major determinant of long term performance for an investment portfolio is not the selection of investments, nor the timing of acquisition of investments, but rather the mix of asset classes, known as asset allocation. This contributes to over 90% of performance.



The table below details the target, long term asset allocation for endowment funds:

Asset Sector	Target Allocation %	Variance %
Cash	5	+/- 10
Fixed interest	25	+/- 15
Australian shares	35	+/- 15
International shares	15	+ 10
Property	15	+ 10
Other	5	+ 5

### Investment strategy guidelines

#### Constraints

In concert with the target asset allocation, the following guidelines are recommended to reduce risk once the portfolio value exceeds \$1M:

- Maximum of 20% in any one investment.
- Maximum of 30% in any one investment manager.
- Strong focus on ethical investment.
- Not less than two active investments per major asset sector.
- Maximum of 15% of the portfolio in illiquid investments.
- No speculative, or high risk, investments.
- No borrowing to amplify capital growth.

### Implementation

To reduce the risks associated with portfolio establishment, it may be prudent to implement the target asset allocation over an extended time period through tranching, or dollar cost averaging.

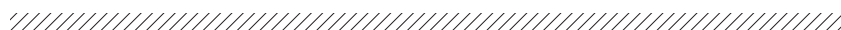
#### Investment types

Flow through and administration funds

Capital allocated for “flow through” and “administration” can be invested in bank deposits, cash management trusts and short term fixed interest securities with AA risk rating.

Endowment funds

Capital allocated for “endowment” can be invested in any publicly available managed investment.



### Investment management

The investment committee can elect to appoint an external investment manager to assist with asset allocation, investment selection and ongoing reporting.

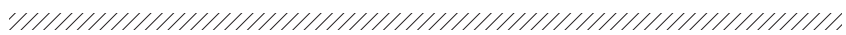
Priority should be given to seeking external advice on a fee for service basis as well as maintaining a diversification of investment managers, particularly once capital exceeds \$1M.

### Review of investment performance

The performance of capital allocated to “endowment” shall be reviewed at least annually, and then on six monthly intervals once capital exceeds \$1M.

The performance of endowment capital will be measured against the average performance of wholesale managers for a “balanced” asset allocation according to the Morningstar published ratings.

Once an external manager is appointed, their written report will be submitted to the investment committee on a six monthly basis.



# Sydney Community Foundation (SCF) Directors, staff and volunteers

## **Board of directors:**

Ros Strong (Chair)  
Sally Treeby (Deputy Chair)  
Phillip Black  
Lucy Brogden  
Bruce Christie  
Dennis Doyle  
Michael Hogan  
Lisa Hudson  
Heather Kent  
Carole-Anne Priest  
Andrew Richards  
Justine Waters  
Helen Wiseman

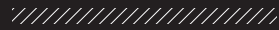
## **Staff:**

Jane Kenny, Executive Officer  
Coty Cortese, Grants Manager  
Daphne Royds, Book keeper (Contractor)

## **Volunteers:**

Sara Alemi, Event Co-ordinator  
Carla Bergen, Newsletter production  
Catherine Brown, Grants Administrator  
Carissa Andrew-Smith, Jennifer Kwiatkowski  
and Kate O'Connell have all assisted the SCF  
with various projects and pieces of work.





**Credits:** Interviews: Jennifer Kwiatkowski **Design:** 2Birds Design Group [www.2birds.com.au](http://www.2birds.com.au) **Editing:** Kate O'Connell

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