



**The decisions we make  
today build momentum  
for meaningful  
long-lasting change.**

Lord Mayor's Charitable Foundation acknowledge and respect Victorian Traditional Owners as the original custodians of Victoria's land and waters, their unique ability to care for Country and deep spiritual connection to it. We honour Elders past and present whose knowledge and wisdom has ensured the continuation of culture and traditional practices.

Image: A Foodprint Melbourne Report. *Roadmap for Resilient and Sustainable Melbourne Foodbowl*, March 2019

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## Our Impact

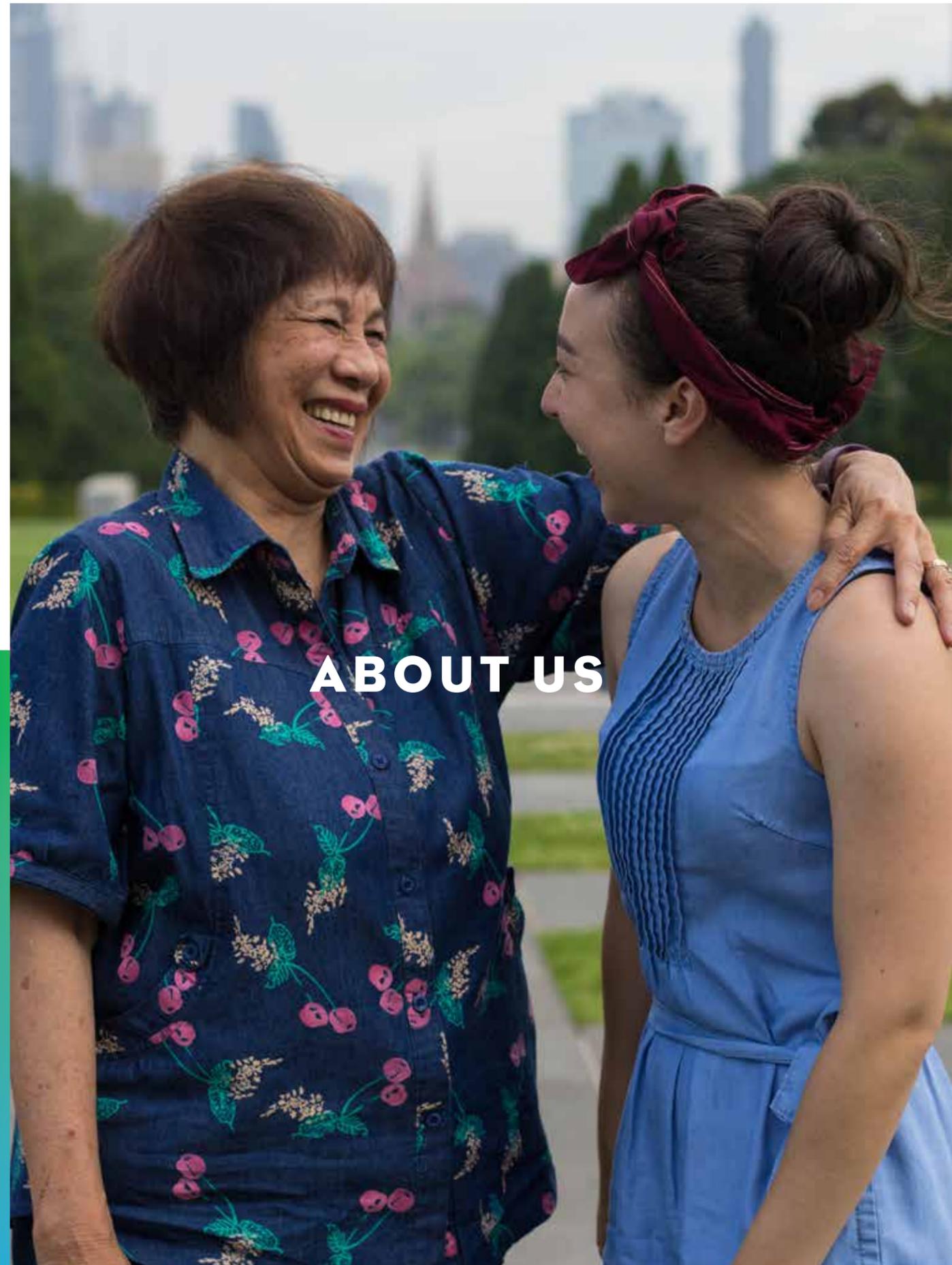
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**Inspiring  
Philanthropy**  
Since 1923



# MELBOURNE'S COMMUNITY FOUNDATION

Lord Mayor's Charitable Foundation is Greater Melbourne's community foundation, working to inspire philanthropy that influences and supports positive social change.

As a leader in the philanthropic sector since 1923, we are not afraid to be innovative and we encourage the exploration of new solutions to tough social and environmental problems.

The Foundation provides thought leadership on many of the issues facing the community. We have responded to the many complex community issues as needs have changed, and we have been flexible and progressive in our response.

Our current Impact Areas are Education & Employment; Environment & Sustainability; Healthy & Resilient Communities, and Homelessness & Affordable Housing. We have set priority outcomes that we want to achieve across the Impact Areas. We also support the philanthropic and social enterprise sector and the Inspiring Philanthropy Impact Area.

## We Exist for

A resilient and inclusive Melbourne.

Inspiring Philanthropy.

## Purpose

To identify and scale solutions that address Melbourne's big social and environmental challenges.

To inspire current and legacy giving through donor advised and collaborative philanthropy.

## Initiatives

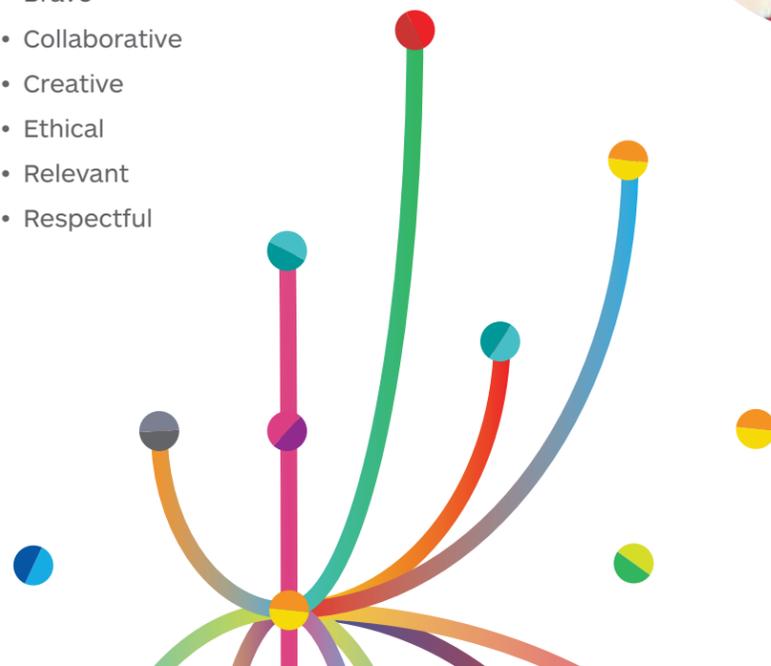
- Affordable Housing Challenge.
- Collaborative Philanthropy.
- Energy Efficiency & Climate Resilience in Vulnerable Households.
- Hot Spots.
- Impact Evaluation.
- Resilient & Inclusive Melbourne.

## Approach

- To support innovative and effective models.
- To build a strong for purpose sector.
- To convene and participate in impactful collaborations and networks.
- To work at a systems level on the biggest challenges.
- To partner with our donors to achieve their philanthropic goals.

## Values

- Accountable
- Brave
- Collaborative
- Creative
- Ethical
- Relevant
- Respectful



# LORD MAYOR'S PATRON MESSAGE



## Community Philanthropy

The power of community philanthropy is demonstrated every day by Lord Mayor's Charitable Foundation.



The Foundation distributed \$11.5 million last financial year to support some of Melbourne's most vulnerable people and address some of our most pressing challenges, through grants, research, partnerships and social investment.

Melbourne must remain a caring city that is focused on our people. The Foundation makes a real impact on people's lives, whether it is providing funding to reduce homelessness or providing education and training opportunities to help young Melburnians find a job.

The Foundation is effective in this and many other community issues and the *Greater Melbourne Vital Signs 2017* research report remains a crucial guide to addressing areas of most need.

Lord Mayor's Charitable Foundation plays an important leadership role as a cornerstone investor, driving innovation, broader attention and resources for many worthwhile projects.

As Lord Mayor of Melbourne, I am proud to be the honorary founding patron of the Foundation and I wish all involved continued success in embedding the philanthropic spirit in our city.

**The Right Honourable the Lord Mayor Sally Capp**  
Honorary Founding Patron of Lord Mayor's Charitable Foundation

# CHAIR'S REPORT

## Inspired by philanthropy

This year marks two very special milestones for me personally.

As we reflect on another successful year for Lord Mayor's Charitable Foundation, there are some areas of the Foundation that I'd particularly like to highlight.

One of those is the sound stewardship of our Investment Committee led by Committee Chair, Dr Raphael Arndt. Through these efforts in wisely investing our donors' funds, the Foundation was able to grant a record \$11.5 million to over 350 charities and grant partners. The impact that this will have over these charities and the four Impact Areas we focus on cannot be understated. Lives will be transformed, a sense of hope will be reignited, and bolder, braver plans will start to take shape to tackle the challenges our community will face in years to come. And of course, this can only be achieved via the commitment and support of our many donors, past and present.

However, as you will read in this year's Annual Report, a community foundation's role is so much more than just providing grants. By tracking the results of the impacts of these grants, as well as the insights we have gleaned through our *Greater Melbourne Vital Signs* report, we can better understand the complex and very specific needs of our community, and which issues to focus on in the future.

This year also marked my third and final year as Chair, and my last as a member of the Board of Lord Mayor's Charitable Foundation. I commenced my journey with the Foundation in 2011 and during that time I have been privileged to hold roles on the Governance Committee, been Chair of the Strategic Marketing Committee and the Co-Chair of the Education & Employment Grants Advisory Panel.

My time on the Board has seen much positive change, as the Foundation, led by Chief Executive Officer Dr Catherine Brown, has evolved to become one of the leading and most inspiring philanthropic organisations in the country. In 2013 this evolution was supported by the Foundation's new logo and marketing campaign, showcasing just how relevant, contemporary and forward-thinking the organisation was becoming. In more recent times, this was followed up with the 'Changing Melbourne for Good' campaign, and the introduction of our Inspiring Philanthropy series of high-profile orators including the Governor of Victoria Linda Dessau AC and Emeritus Professor Gillian Triggs, who at the time was President of the Australian Human Rights Commission.

Dr Catherine Brown (CEO), Carmel Guerra OAM (CEO of Centre for Multicultural Youth and Guest speaker) and Andrew Baxter (Chair) at Inspiring Philanthropy Celebration • 2018



From left to right: Craig Bell (Board), Harriet McCallum (Senior Program Manager, Healthy & Resilient Communities), Andrew Baxter (Chair) and Dr Sandra Hacker AO at Inspiring Philanthropy Celebration at Zinc, November 2017

Most recently, I had the pleasure of exploring and convening the activation of a Melbourne Entrepreneurs Fund which has the potential to grow and positively impact the Greater Melbourne community for many years to come.

I am sure Lord Mayor's Charitable Foundation will continue to play a leading role addressing the greatest challenges our community is facing for many years to come.

I would like to take this opportunity to acknowledge the support of our Board throughout the year, in particular Dr Sandra Hacker AO our Deputy Chair, for her strong commitment and counsel.

I would also like to recognise that Daniel Leighton, a former Chair, retired from the Board in October 2018 after ten years of outstanding service. In addition to serving as Chair of the Foundation from 2014 to 2016, Daniel was a member of various Board committees, a Chair or member of several Grants Advisory Panels, and a mentor for students in our Youth in Philanthropy program.

I would also like to recognise and thank Jane Peck who served on our Board for three years as Chair of our Strategic Marketing Committee and Co-Chair of our Education & Employment Grants Advisory Panel.

We also welcomed two new Board members in Angus Graham OAM and Paul Bird, who are already contributing greatly via their strong experience in the not-for-profit sector and their input into the investment and social investment areas.

I would also like to thank the members of our Grants Advisory Panels who continue to provide expert advice and support to our grants program managers.

Finally and most importantly, I would like to take this opportunity to congratulate the Foundation's Chief Executive Officer, Dr Catherine Brown, and her team on such a terrific year, in leading and managing the operations of the Foundation.

As I farewell my official responsibilities as the Chair and a Board member of this wonderful organisation, I look forward to continuing to support the future success of the Lord Mayor's Charitable Foundation, as many other Melburnians and Australians do, to ensure the health and wellbeing of our community.

**Andrew Baxter**  
Chair  
Lord Mayor's Charitable Foundation



# CEO'S REPORT

## Impact driven philanthropy

An impact driven approach to philanthropy requires a commitment to understanding a problem in depth, to work with others to find solutions, including across sectors, and to keep learning.

Philanthropy has some special roles to play in tackling the tough social and environmental challenges that we face as a community. Philanthropy can support innovation. We can convene new collaborations. We can provide and help leverage other support.

Lord Mayor's Charitable Foundation is a public community foundation. We are independent and maintain knowledge about the needs of our community. We are trusted by donors to hold funds for charitable purposes.

As Melbourne's community foundation, we are in a unique position to use all the philanthropy tools to support cross-sector collaboration and partnerships, bringing people and organisations together that may not usually connect to achieve greater impact.

Dr Catherine Brown (CEO) at Inspiring Philanthropy Oration • 2018



It is imperative that we find solutions to problems such as homelessness and climate change as well as addressing racial discrimination and the high levels of youth unemployment in some parts of Melbourne.

Some older women are facing major challenges in housing, economic security and social isolation. This was highlighted in the *Giving Older Women in Greater Melbourne a Voice* report, which we commissioned and launched this year.

While many know of our work in homelessness and affordable housing over the last ten years, we are also applying a multi-pronged approach to other major challenges such as sustainable food systems, the health impacts of climate change and energy efficiency and vulnerable communities. We call this using all the tools in our Philanthropy Toolbox.



Across all our work, we continue to focus on overcoming disadvantage and on supporting innovative solutions to the tough social and environmental problems. We try to be well informed so that we can be brave funders. We want to support leaders in the not-for-profit sector to test new ideas and then make them happen.

We want a sustainable and inclusive community, and in the face of climate change, we are aware of ensuring that socially and financially disadvantaged people are not excluded further as we transition to a low-carbon economy.

At the *Philanthropy Australia Awards* this year, the winning projects exhibited some shared characteristics of outstanding philanthropy: learning, collaboration, having a clear strategy (a specific problem to solve and a theory of change to test), deep knowledge of the issue and courage. These characteristics underpin our own work in philanthropy – and in fact two of our projects were shortlisted for awards.

Several years ago, we restructured our grants team to reflect this approach based on deeper knowledge of our Impact Areas. Our program managers are now living this approach as they demonstrate deep knowledge of the problems we are trying

to solve and as they catalyse, convene and collaborate. We also added a Data Analyst and digital communications capability to our team.

We work across the Philanthropy Toolbox, from building collaborations around grants, to leading initiatives, using communications tools to share stories and provide information, commissioning and undertaking research, and supporting and working with networks around policy.

The other aspect highlighted by the *Philanthropy Australia Awards* was courage and the ability to stay with an issue over a longer time to build impact.

The redevelopment of Ozanam House exemplifies both these characteristics. Our knowledge of the causes of homelessness and approaches to affordable housing have given us the confidence to support some big, ground-breaking projects.



Left: Launch of the redevelopment of Ozanam House • 2019  
From left to right: Robert McGauran (Board), Dr Catherine Brown (CEO), and Lord Mayor Sally Capp at the launch of the redevelopment of Ozanam House • 2019



The new Ozanam House was first presented to us as an initial concept plan.

While the plans evolved further to capture the opportunities for sustainability (reducing carbon emissions and long-term operational costs), the concept of increasing the availability of housing to include older women as well as older men; including crisis housing, medium and longer-term housing; and designing wrap around health and other support services into the building was inspiring. We could see the project's potential.

We were the first foundation to support the redevelopment project and it has been uplifting to see the project grow into a fully-fledged service that was launched by the Minister for Housing in June. I heard someone saying at the launch: "So, this is what affordable housing can be." Yes! Demonstrating courageous solutions means others can replicate them.

We would not have been as courageous in our early support of this project and others, including our partnership with the City of Darebin around affordable housing, without the knowledge and expertise of the team at Transforming Housing Partnership led by Prof Carolyn Whitzman. Transforming Housing Partnership was an initiative of the School of Design, Faculty of Architecture at University of Melbourne.

The researchers within the Partnership worked with cross sector partners to develop affordable housing site selection criteria, definitions of affordable housing and other policy advice which was applicable to practice. Transforming Housing Partnership has been recognised as a Hallmark Initiative by the university and has now merged with the IBA Melbourne project to become the Affordable Housing Hallmark Research Initiative, now led by Prof. Alan Pert and a team from across the university.

In the policy space, our support of the FoodPrint project has been something of which we are especially proud. The thoughtful work undertaken by Dr Rachel Carey and her collaborators as they have mapped Melbourne's foodbowl, identified the threats and recommended solutions to a sustainable and climate resilient food system, is being emulated and recognised by other cities and researchers. You might like to visit: [research.unimelb.edu.au/foodprint-melbourne/home](http://research.unimelb.edu.au/foodprint-melbourne/home).

The number of downloads of these reports has been enormous. This work was also recognised by the University of Melbourne through a recent Excellence in Engagement Award.

Communications has been another important tool that has been applied this year. Community Housing Industry Association considered how best to improve the affordable housing landscape to enable more and better housing to be built.

Associate Professor Susan Feldman (Guest Speaker) with Dr Catherine Brown (CEO) at Swanson Society Lunch • 2019



Roadmap for Resilient and Sustainable Melbourne Foodbowl report • 2019



From left to right: K. Jane Peck (Board), Robert McGauran (Board), John Blewonski (Former CEO of VincentCare), and Dr Catherine Brown (CEO) at the Topping off Event of Ozanam House • 2018

Monash Climate Change Communication Research Hub (MCCCRH) produced some high-quality data which was used by Seven TV News and ABC News. MCCCRH also partnered with Leader Community News, an old friend of the Foundation to provide more information about local climate impacts.

An outstanding piece of research was conducted by a collaboration between Victoria University, Deakin University and the University of Tasmania with Parkville College and to improve educational connections for young people in custody. It was an honour to take part in the launch.

We made grants to many on-the-ground projects where leading organisations are demonstrating solutions to affordable housing, employment, responding to heatwaves, reducing carbon emissions and costs by low-income residents, and other challenges.



From left to right: Michael Lim (Guest Speaker, YLab), Erin Dolan (Program Manager, Homelessness & Affordable Housing), Daniel Padiaditis (Senior Program Manager, Environment & Sustainability), Stephen Torsi (Program Manager, Education & Employment), Dr Catherine Brown (CEO), Harriet McCallum (Senior Program Manager, Healthy & Resilient Communities), Sherry-Rose Bih Watts (Host, YLab), and Yung Le (Grants Administrator) at YIP Forum • 2019

Our support of social enterprises across all the Impact Areas continues. We have been pleased to support Swinburne's Centre for Social Impact to work with five social enterprises' on the Social Enterprise Impact Lab. We continue to hold three impact investments and are actively considering others that align with the social and environmental outcomes within our Impact Areas.

Youth in Philanthropy has continued to develop through an increasingly student-led approach. It is very heartening to see our young philanthropists gaining the skills they need to make a difference, whatever their path in life. At the recent Insights event, we asked them what philanthropy meant. I could not have put it better than this response:

"To me, philanthropy means not only putting money towards causes to alleviate a problem, but rather putting time and effort into learning about the issue, listening to real stories and connecting to the cause beyond a monetary stand point.

Philanthropy incorporates real social and cultural change into grant giving and problem solving."

In closing, I would like to thank my team who are embracing our increasing focus on impact and our commitment to using the whole Philanthropy Toolbox in our work. I would like to thank Andrew Baxter for his leadership as Chair over the last three years and all the other Board members for their contribution to strategy and the Board Committees.

Finally, to the leaders in not-for-profit organisations who we support and the donors who entrust us with their journeys in philanthropy, thank you for your shared commitment to a resilient and inclusive future.

In the coming year we will be deepening our work in affordable housing; community resilience; reducing education and employment inequality; and in environment and sustainability.

We are adding a multi-impact Resilient & Inclusive Melbourne Initiative.

As a final call to action, another quote from a Youth in Philanthropy participant: "You don't have to be Tony Stark or Bill Gates to make a difference. Just do something!"

**Dr Catherine Brown**  
Chief Executive Officer  
Lord Mayor's Charitable Foundation



Vital Conversations: Giving Older Women in Greater Melbourne a Voice report • 2019



# PHILANTHROPY TOOLBOX

## Maximising Impact

Philanthropic foundations are about more than money. Lord Mayor's Charitable Foundation has developed deep knowledge of the Impact Areas in which we grant, which has allowed us to work collaboratively on Initiatives within each Impact Area. The Initiatives are reported in the relevant Impact Area section.

We describe our multi-pronged approach to impact as using all of the tools in the Philanthropy Toolbox. Throughout this report, you will see examples of projects which use a range of tools.

Through research, which we undertake or which we commission, we are better able to share knowledge through communications and to make grants that support demonstration projects, inform policy, develop social enterprise and support innovative solutions to tough social and environmental challenges. Examples of research are our *Vital Signs* reports and recent *Vital Conversations: Giving Older Women in Greater Melbourne A Voice* report. Some of the collaborations we participate in include research institutes and universities, other funders and our own donors. We bring people together to develop projects and share knowledge across the Impact Areas.

Understanding the social or environmental impact we want to achieve has enabled us to make three impact investments, which combine a financial return with a measurable social or environmental impact. This is an area we expect to grow over time.

Importantly, we are also building our capability in impact reporting. Our Data Analyst is working with our Grants team to meld progress and acquittal report data with granting statistics. This work is framed around the outcomes that we want to achieve in the priorities within each Impact Area. We look forward to continuing to develop this work.

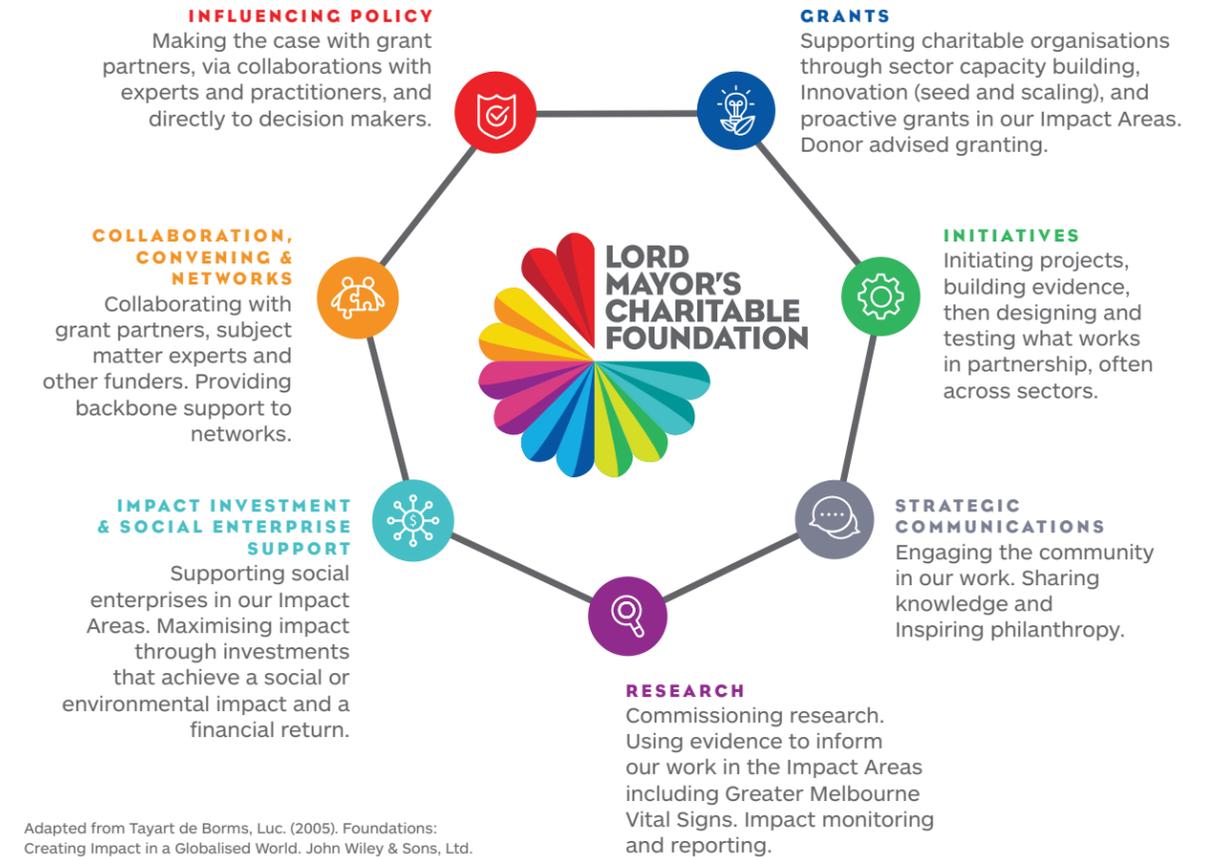
While each Impact Area is reported separately in this report, we know that many of the issues are inter-related. We know that a stable home can have a positive effect on mental health, and on education and employment opportunities. We will be exploring further multi-impact opportunities in the coming year.

We are beginning to link our work with the United Nations' Sustainable Development Goals (SDGs) so that we can better connect with other foundations and organisations working on shared challenges. We continue to contribute to the Foundations Maps project with the US Foundation Centre, now led locally by Philanthropy Australia.

Through strategic communications we are committed to learning and sharing knowledge as we support thought and practice leaders who are working towards positive social and environmental change.



## Philanthropy Toolbox



Adapted from Tayart de Borms, Luc. (2005). Foundations: Creating Impact in a Globalised World. John Wiley & Sons, Ltd. Updated, Dr Catherine Brown, 2019

## The Toolbox in action

**INFLUENCING POLICY**  
**Parkville Project**  
Better education opportunities for young people in remand and custody.

**COLLABORATION & NETWORKS**  
**Hot Spots Initiative**  
Building community resilience in vulnerable communities at risk of heatwaves. (Page 38)

**IMPACT INVESTMENT & SOCIAL ENTERPRISE SUPPORT**  
**Hireup**  
Digital platform enabling people with disabilities to organise their own carers to build their social, employment or educational opportunities.

**RESEARCH**  
**FoodPrint**  
Policies to protect and enhance Melbourne's foodbowl. (Page 12)

**STRATEGIC COMMUNICATIONS**  
Monash Climate Change Communications Research Hub. (Page 31)

**INITIATIVES**  
Energy Efficiency & Low-income Households: Renew, Community Housing Industry Association & other partners. (Page 33)

**GRANTS**  
Cities Power Partnership, Climate Council, Housing Choices Australia: Affordable housing at the Nightingale Village. (Page 45)



# OUR IMPACT



## Granting Principles

The Foundation's approach to grantmaking is reflected in the following funding principles:

- Equality and equity
- Evidence-based
- Promote social inclusion and cohesion
- Community engagement
- Engage beyond grants
- Knowledge creation and dissemination
- Sustainability
- Long-term change
- Balanced giving
- Scalability and replicability
- Partnerships and collaboration

## Grant Categories

- Thrive
- Innovation – Seed
- Innovation – Scaling-Up
- Proactive
- Initiative
- Signature
- Eldon and Anne Foote Trust Donor Advised Program

## Sustainable Development Goals

As a community foundation, we are committed to further connecting our work with the United Nations' Sustainable Development Goals, a set of 17 shared goals set by the United Nations in 2015 to be achieved by 2020.

## Impact Areas

Through responsive and proactive granting, Lord Mayor's Charitable Foundation enables charitable organisations working within our key Impact Areas to grow their capacity, as well as explore and develop new initiatives and innovative solutions.

### Our Impact Areas:

-  **Education & Employment**
-  **Environment & Sustainability**
-  **Healthy & Resilient Communities**
-  **Homelessness & Affordable Housing**
-  **Inspiring Philanthropy**



Open Spaces Event at Abbotsford Convent • 2019

## FOOTE PHILANTHROPY

The Foundation is honoured to have been chosen by Mr Eldon Foote QC as the trustee of his charitable bequest.

The Foote Bequest is the largest bequest ever received by the Foundation. We honour Eldon Foote's leadership in leaving such a generous legacy. Mrs Anne and Mr Eldon Foote initially established a Charitable Fund Account with the Foundation in 2000 with two gifts of \$5 million.

In 2004, Mr Foote passed away suddenly leaving a large estate, which he had built up through his legal career and business ventures. Mr Foote gave his residuary estate equally to the Edmonton Community Foundation and Lord Mayor's Charitable Foundation. The Foote funds are to be used to support projects for charitable purposes within the arts, education, heritage, health, medical research, athletics, recreation, environment or social causes. You will find projects in these areas across the grants program, including in the Foote Trust Donor Advised Grants program, which is advised by Mrs Anne Foote.



Dialogue in the Dark, Guide Dogs Australia

### GRANTS MADE FROM THE FOOTE GIFT BY AREAS OF INTEREST

2018/19	
Arts <sup>1</sup>	\$317,389
Athletics	\$100,000
Education	\$1,398,745
Environment	\$2,143,796
Health	\$726,500
Heritage	\$278,000
Recreation	\$85,789
Social Causes	\$1,544,364
<b>TOTAL</b>	<b>\$6,594,583</b>

Notes:  
1. Arts Project in progress: Collingwood Arts Precinct (CAP) \$1 million (2015/16 & 2017/18)

## Foote Trust Donor Advised Grants Program

Mrs Anne Foote Advised on the following grants:

ARTS		ENVIRONMENTAL		SOCIAL CAUSES	
<b>Bangarra Dance Theatre</b>	\$22,000	<b>Climate Action Network Australia</b>	\$44,000	<b>Lort Smith</b>	\$63,000
Australia Limited Fund Rekindling		Assistance to advocate for Climate Action		Animal Connection and Care for Young People At-Risk	
<b>Big Hart</b>	\$100,000	<b>Invasive Species Council</b>	\$30,000	<b>Pegasus Riding for The Disabled</b>	\$24,827
Digital Futures – Young Women Driving Change		Feral Cat Project (Norfolk Island)		Pegasus Farm Wish List – Computers and IT infrastructure upgrade	
<b>Victorian Arts Centre Trust</b>	\$30,000	HEALTH		<b>TOTAL</b>	<b>\$749,863</b>
Metro Connect: Investing in backstage crews in Melbourne's outer suburbs and Geelong		<b>Anam Cara House Geelong</b>	\$40,000		
<b>EDUCATION</b>		The New Anam Cara Geelong – Palliative Care Community Hub			
<b>Ardoch</b>	\$50,000	<b>Canberra Health Services</b>	\$100,000		
Community Education Volunteers – NSW expansion		Centenary Hospital for Women and Children			
<b>Engineers Without Borders Foundation</b>	\$50,000	<b>Guide Dogs NSW/ACT</b>	\$35,000		
Regioneeering: Reinforcing STEM education outcomes for Aboriginal and Torres Strait Islander students		Guide Dog Sponsorship			
<b>The Trustee for the Australian Business and Community Network (ABCN) Scholarship Foundation</b>	\$44,536	<b>Guide Dogs Victoria</b>	\$35,000		
ABCN and Eldon & Anne Foote Mentoring and Financial Scholarships		Puppy Sponsorship – Apprentice			
		<b>The Royal Society for the Prevention of Cruelty to Animals ACT In</b>	\$40,000		
		Wishlist items			
		<b>The Shepherd Centre – For Deaf Children</b>	\$41,500		
		Reach out – Support services to children with hearing loss in South-western Sydney 2019 (RO2019)			



From left to right: The late Eldon Foote QC and Mrs Anne Foote with Mr Geoffrey Green OAM FFD ED (Former Chair)



Bangarra Dance Theatre • 2018

## Eldon Foote Bequest

In 2018/19, the Foundation made some additional grants to specifically reflect the Foote Trust areas of interest. These are highlighted below. The Foote bequest also funds grants within the four Foundation Impact Areas: Education & Employment; Environment & Sustainability; Healthy & Resilient Communities and Homelessness & Affordable Housing (social causes).



La Mama, Artist's Impression • 2019

### La Mama Theatre – Heritage, Arts

A grant of \$200,000 was made to La Mama Theatre to support the rebuilding of its community theatre after a major fire in 2018. La Mama is also taking the opportunity of ensuring that the theatre complies with disability access standards and has increased space for performers and venue management. The rebuild was made possible by a partnership between Lord Mayor's Charitable Foundation, Gandel Philanthropy, Sidney Myer Fund and John T Reid Charitable Trust, which together matched \$1 million provided by the State Government. La Mama was able to contribute an insurance payout and fundraising from a public campaign to reach their total fundraising target. Works are expected to commence in November 2019.

### Abbotsford Convent – Heritage

The National Heritage listed Abbotsford Convent is Australia's largest multi-arts community precinct, encompassing 11 historic buildings across 6.8ha of grounds. Abbotsford Convent Foundation (ACF) promotes the arts, education, culture, heritage, health and wellbeing, the environment and the community.

Abbotsford Convent Foundation (ACF) has owned the Convent since 2004 and, as custodian of the precinct, oversees its daily operation and activation, including management of over 120 studio spaces housing a diverse range of more than 150 creative tenants, maintenance of the precinct's expansive gardens and grounds, management of over 20 multi-use heritage venues and their hiring to and programming for community, operation of two public galleries, and provision of facilities for a school, a radio station and multiple cafes.

Subsequent to the Convent's recent National Heritage listing, ACF's future trajectory is focused on restoring and activating the entire Convent precinct with 85 per cent of the Convent's buildings, and 30 per cent of its 6.8ha of grounds and gardens currently accessible for community use.

Lord Mayor's Charitable Foundation has provided \$78,000 to enable ACF to undertake a new Master Plan to establish a clear framework for future works on-site that will:

- Safeguard listed, heritage qualities of the precinct and its unique 'sense of place.'
- Consider built, social, historical, ecological and environmental site context.
- Provide a framework for regeneration and investment.
- Ensure the design and functionality of the Convent's physical spaces enable realisation of the strategic values and priorities as articulated in ACF Business Plan 2017/18–2021/22.

Abbotsford Convent is an important piece of community infrastructure that responds to many of the Foote areas of interest.

### Covidence – Medical Research

The exciting Covidence project developed by Veritas has been supported twice through Foote bequest funds. Covidence, a not-for-profit health social enterprise, has built a software platform to speed up the ability of medical researchers to undertake systematic reviews of research and reduce the time between research and application in medical practice. In the first stage of the project, Lord Mayor's Charitable Foundation leveraged support from our funding partners The Ian Potter Foundation and the Paul Ramsay Foundation. We are very pleased to continue supporting this work in partnership with both foundations. The Foundation has granted \$200,000, The Ian Potter Foundation \$400,000, and the Paul Ramsay Foundation \$1.4 million to support the next stage of development.

Covidence is well on the way to achieving sustainable impact, but to realise the organisation's public good ambitions, continue cross-subsidy of free and discounted access to the software platform, and achieve long-term financial sustainability, Covidence is pursuing operational expansion. This increased capacity will achieve the following:

- Build the global medical research evidence community, Covidence will create an organisation-wide solution: the Covidence Systematic Review Management System. Covidence's institutional customers will use this system to build their user communities and a culture of evidence within their organisations.
- Maximise systematic review efficiency, Covidence will become a catalyst for systematic review machine learning (ML) research.
- Accelerate progress towards a 'Living Evidence' ecosystem, Covidence will rebuild data structures and integrate with other ecosystem platforms.

### Contemporary Arts Precinct – Arts, Heritage

Lord Mayor's Charitable Foundation, through the Eldon & Anne Foote Trust, is part of a philanthropic consortium each contributing \$1 million (paid in instalments) towards the redevelopment of the former Collingwood TAFE site as a contemporary arts precinct (CAP) of international standing. The Victorian Government is also a major partner in the project.

After resolving a number of planning matters, the redevelopment is progressing well and is due to open in early 2020. A diverse group of arts organisations is in the process of finalising leases at CAP. The Foundation is delighted that emerging and early career artists will also have opportunities to develop their skills and employment opportunities. CAP is importantly preserving the arts in inner Melbourne. The last instalment of this grant was paid in August 2019.

▶ View this story at [lmcfa.org.au/CAP](https://lmcfa.org.au/CAP)



Contemporary Arts Precinct, Artist's Impression • 2019

Carmel Guerra oAM (CEO of Centre for Multicultural Youth and Guest speaker) with Stephen Torsi (Program Manager, Education & Employment) at Inspiring Philanthropy Celebration Event • 2018



Yung Le (Grants Administrator) at Aspire Graduation • 2019



Representatives participating in the Foundation's Hot Spots Initiative.

From left to right: Nuredin Hassan (IPC Health), Rob Macindoe (enliven), Alison Fraser (Sustainability Victoria), Harriet McCallum (Senior Program Manager, Healthy & Resilient Communities), Glenn Menner (Brimbank City Council), Lynley Dumble (Brimbank City Council), Heather Lawson (enliven), Steve Cameron (Emergency Management Victoria), Dianna McDonald (Sustainability Victoria), Darren Wilson (City of Greater Dandenong), Susan Quinn (VCOSS), Yonis Dawd (Brimbank City Council), Meagan Chiuchiarelli (IPC Health) • 2019



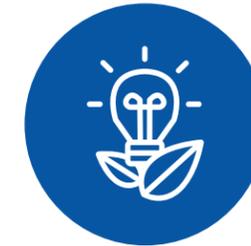
Dr Catherine Brown (CEO), Andrew Deane (Donor Development Manager), Erin Dolan (Program Manager, Homelessness & Affordable Housing), Garry Tanner (Chief Marketing & Development Officer), and Caitriona Fay (General Manager at Perpetual) at Launch of VincentCare's redeveloped Ozanam House • 2019



Ringwood Secondary College at Youth in Philanthropy Forum Event • 2018

# GRANTS AT A GLANCE

2018/19



## \$11.540 MILLION IN GRANTS

BY GRANT TYPE

Supporting innovation and the exploration of new ideas

**\$7.024M**  
(60%)

Innovation – Seed, Innovation – Scaling-Up, Proactive, Initiative and Signature grants

Building the capacity of the charitable sector

**\$1.913M**  
(17%)

Grants building the capacity of the charitable sector Thrive, Youth in Philanthropy grants

Donor Advised grants

**\$2.603M**  
(23%)

Donor advised grants

BY IMPACT AREA

Supporting our Impact Areas:

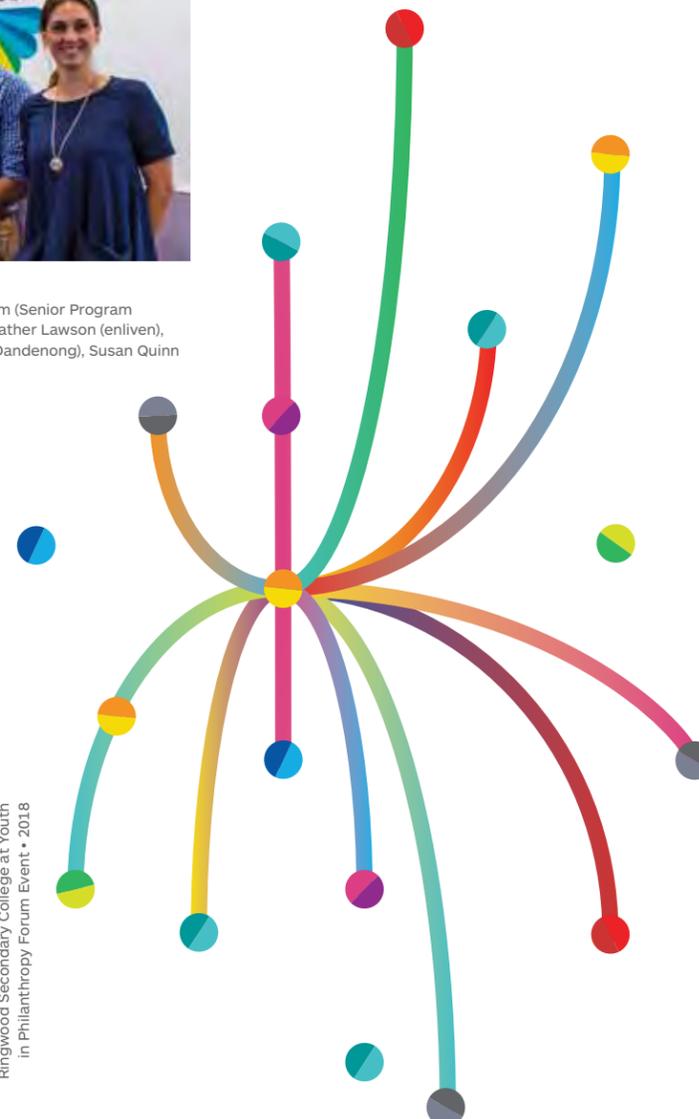
**\$1.554M**  
Education & Employment

**\$2.010M**  
Environment & Sustainability

**\$1.615M**  
Healthy & Resilient Communities

**\$3.092M**  
Homelessness & Affordable Housing

**\$0.453M**  
Inspiring Philanthropy





# EDUCATION & EMPLOYMENT

Ganbina • 2018

**Lord Mayor's Charitable Foundation recognises that access to education and employment is important at all stages of life, particularly for younger and older people.**

We want to see flourishing employment networks and opportunities that support people to develop skills and follow meaningful career paths, as well as help identify emerging approaches to workforce participation that better meet the needs of people seeking work.



**Stephen Torsi**  
Program Manager  
Education & Employment



## PRIORITY:

- 1. Supporting young and older people to access education**
- 2. Supporting young and older people to access work**



# EDUCATION & EMPLOYMENT GRANTS TOTAL \$1.554M

## 1. Supporting young and older people to access education

### THRIVE

**Cool Australia** \$40,000  
Enhanced Web Capacity  
Multi year grant  
Total: \$120,000

### INNOVATION - SEED

**Monash University** \$48,625  
Co-Make Melbourne

**The Push** \$49,889  
Electronic Music Incubator at Collingwood Arts Precinct

### INNOVATION - SCALING UP

**Ganbina** \$150,000  
Piloting Ganbina Expansion Project  
Multi year grant  
Total: \$300,000

### PROACTIVE

**Banksia Gardens Association** \$40,000  
Transition from Project REAL to the Northern Centre for Excellence in Trauma Informed Education (NCETIE)

**River Nile Learning Centre** \$10,000  
Engagement & wellbeing for newly arrived young refugee and asylum seeker women

**The Smith Family** \$15,000  
Girls at the Centre - Bairnsdale (VIC)

**World Literacy Foundation** \$48,500  
Closing the Gap: Empowering education and employment pathways for young people.

**Youth Affairs Council Of Victoria** \$20,000  
Koorie Youth Summit 2017-2019  
Multi year grant  
Total: \$60,000

## 2. Supporting young and older people to access work

### THRIVE

**Ability Works Australia** \$40,000  
Welding Robot for manufacture of temporary fencing

**Paynesville Neighbourhood Centre** \$20,000  
Management Solutions  
Multi year grant  
Total: \$58,000

**Green Collect** \$33,720  
Building Capability in Change Management for Social Enterprise Scale Up

**Fitted For Work** \$40,000  
Fitted for the Future  
Multi year grant  
Total: \$120,000

**Free to Feed** \$38,553  
Free to Feed Capacity Building

**Multicultural Arts Victoria** \$15,000  
Go-For-Broke Artist Employment Initiative

**Per Capita Australia** \$35,000  
Building generational solidarity to address inequality  
Multi year grant  
Total: \$105,000



Banksia Gardens Association • 2018

### INNOVATION - SEED

**Social Ventures Australia Limited** \$50,000  
Evidence for Jobs

### INNOVATION - SCALING UP

**Berry Street Victoria** \$93,000  
Y-Change : Momentum  
Multi year grant  
Total: \$190,000

**Conscious Creative** \$142,184  
HoMie Pathway Alliance  
Multi year grant  
Total: \$289,708

**Good Cycles** \$150,000  
City Services  
Multi year grant  
Total: \$300,000

### PROACTIVE

**Australian Council of Social Service** \$50,000  
Raise the Rate Campaign

**Centre for Multicultural Youth** \$30,000  
Developing a business case for an employment focussed social enterprise

**Ganbina** \$20,283  
Leadership Capacity

**La Mama Theatre** \$200,000  
Redevelopment of La Mama Community Theatre

**Melbourne Women in Film Festival** \$5,500  
Visualise Your Voice

**Outer Urban Projects** \$65,000  
Linkages Employment Generator and Zone 2  
Multi year grant  
Total: \$195,000

**Tomorrow Today Education Foundation** \$50,000  
Future Work  
Multi year grant  
Total: \$150,000

### INITIATIVE

**Swinburne University of Technology** \$48,307  
Extend Impact Social Enterprise Action Research  
Multi year grant  
Total: \$119,287

### INITIATIVE FUTURE OF WORK

**The Foundation for Young Australians** \$80,000  
The gig economy, young people, and inequality  
Multi year grant  
Total: \$150,000



### Good Cycles: City Services

Lord Mayor's Charitable Foundation has partnered with Good Cycles for the past five years to provide training and employment opportunities for young people at-risk of disengagement from education and their community.

The most recent grants have enabled Good Cycles to launch Community Bike Hubs, a social franchise of bicycle repair workshops offering employment for young people and the scaling-up of an innovative new city services project that will extend its employment program.

Good Cycles has identified a range of city services such as graffiti removal, parking meter servicing and bin cleaning across inner Melbourne that can be delivered using cargo bikes. These services can provide meaningful employment pathways for at-risk youth as part of Good Cycles' existing transitional employment model.

The Foundation's Program Manager for Education & Employment Stephen Torsi said, "The Foundation and the Good Cycles team have built a strong partnership which serves as a great example of how community philanthropy can nurture social innovation and entrepreneurship to increase employment opportunities."

Jaison Hoernel, Chief Executive Officer at Good Cycles said, "The recent funding for our City Services Project will help Good Cycles create new and exciting employment opportunities for disadvantaged young people. Good Cycles is greatly appreciative of the continued support received from Lord Mayor's Charitable Foundation over the years particularly in its openness to look at new ways of creating impact."



Good Cycles • 2019

### Future of Work Initiative - The Foundation for Young Australians: Gig Economy

#### Initiative



The Foundation for Young Australians • 2019



The emergence of Australia's 'gig economy' of short-term contracts, casual or freelance work and the impact of increasingly precarious work on young people needs to be understood.

We often hear about the gig economy, that provides short 'gig' type work through digital platforms, as a disruptive force for change. But we know that this type of work extends beyond digital platforms into contract and other similarly flexible work. This research project will seek to provide a shared understanding of the flexible economy (which includes the gig economy) so we can fully capture the impact of increasingly precarious work on young people. Lord Mayor's Charitable Foundation has partnered with The Foundation for Young Australians and their social enterprise YLab to research the extent of Australia's gig economy and the impact it has on young people and inequality. The first research paper, to be released in November 2019 will provide the national picture of the flexible economy. The subsequent work will take an in depth look at how young people are navigating and living the gig economy life in Melbourne and will be ready early 2020.



### The Push: Electronic Music Incubator

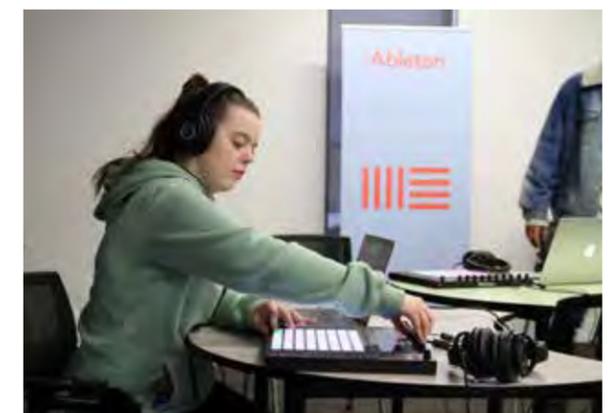


Lord Mayor's Charitable Foundation provided a grant to The Push, a not-for-profit youth music organisation, to ensure that young women and gender diverse young people have opportunities to develop their talent and skills in electronic music.

With a significant shift towards electronic music production among young people, The Push is creating opportunities for young music artists to use new technology platforms to produce and perform music.

Research has now shown that young women and gender diverse young people face barriers to become music artists and access the skills and training they need to produce industry-standard releases and transition into a live performance setting.

Through its Electronic Music Incubator, The Push will provide a range of dedicated programs to educate young women and gender diverse people to overcome these barriers to create and perform electronic music. Participants will be supported by current artists to develop the skills, knowledge and networks they need to pursue successful and long-lasting careers in the contemporary music industry.



The Push Electronic Music Incubator • 2019

The Push Electronic Music Incubator • 2019



Climate Council Australia • 2019

**Lord Mayor's Charitable Foundation is developing and incubating solutions to difficult environmental challenges, as well as fostering the social change required to ensure a smooth transition to a more sustainable future.**

Our Environment & Sustainability priorities change over time in response to current and emerging issues, supported by a strong evidence-base.



**Daniel Padiaditis**  
Senior Program Manager  
Environment & Sustainability



**PRIORITY:**

- 1. Transitioning towards a low-carbon economy**
- 2. Building a sustainable food system**
- 3. Protecting aquatic eco-systems**



**ENVIRONMENT & SUSTAINABILITY GRANTS**  
**TOTAL \$2.010M**

**1. Transitioning towards a low-carbon economy**

THRIVE	
<b>Alternative Technology Association</b> Website Rebranding and Consolidation	<b>\$33,000</b> Multi year grant Total: \$68,000
<b>Australian Youth Climate Coalition</b> Australian Youth Climate Coalition – Movement Building	<b>\$40,000</b>
<b>Beyond Zero Emissions</b> Strengthening volunteer management at Beyond Zero	<b>\$35,000</b> Multi year grant Total: \$70,000
<b>Climate Council of Australia</b> Climate Council Digital Infrastructure and Website	<b>\$20,000</b> Multi year grant Total: \$80,000
<b>Environmental Justice Australia</b> Foundation for impact – building Environmental Justice	<b>\$35,000</b> Multi year grant Total: \$100,000
<b>Friends of the Earth (Australia)</b> Earthworker: Eureka's Future Social Enterprise	<b>\$40,000</b> Multi year grant Total: \$120,000

INNOVATION - SEED	
<b>Community Housing Federation of Victoria</b> Financing and business model options for energy efficiency in community housing	<b>\$48,000</b>

INNOVATION - SCALING-UP	
<b>Climate Council of Australia</b> Cities Power Partnership	<b>\$75,000</b> Multi year grant Total: \$150,000
<b>Monash University</b> Pressing the Climate – Community Newspapers as Climate Educators	<b>\$126,680</b> Multi year grant Total: \$259,359
<b>University of Melbourne</b> Scaling Up Climate Change Leadership	<b>\$142,858</b> Multi year grant Total: \$285,894

PROACTIVE	
<b>Into Our Hands Community Foundation</b> Energy Retailer Launch	<b>\$40,000</b>
<b>Monash University</b> Communicating climate change in Australia	<b>\$148,000</b> Multi year grant Total: \$296,000
<b>Monash University</b> Showcasing Climate Information on Weatherpulse	<b>\$49,545</b>
<b>Sustainable Living Foundation</b> SLF Climate Documentary Web Series	<b>\$49,000</b>

**2. Building a sustainable food system**

THRIVE	
<b>Friends of the Earth Melbourne</b> Building Capacity for our Zero Waste Hub	<b>\$23,552</b>
<b>Sustainable Gardening Australia</b> SGA – Thrive 2018 – Building SGA's external communication and community engagement	<b>\$20,000</b> Multi year grant Total: \$40,000
<b>Sustain: The Australian Food Network</b> Accelerating Food System change at the local level	<b>\$17,000</b>

INNOVATION - SEED	
<b>3000acres Grow</b> Open Productive Gardens Melbourne	<b>\$42,700</b>
<b>Climate Works Australia (Monash University)</b> The Australian Sustainable Food and Land Use Project – Phase 1	<b>\$50,000</b>

INNOVATION - SCALING-UP	
<b>Sustain: The Australian Food Network</b> Melbourne Food Hub	<b>\$150,000</b> Multi year grant Total: \$300,000

PROACTIVE	
<b>Food Frontier Institute</b> Alternative Proteins Report	<b>\$30,000</b>
<b>Sustainable Living Foundation</b> Great Local Lunch 2018/19	<b>\$50,000</b>

Alison Marchant, Farmers for Climate Action • 2019



Nicholas Carrazzo and Kieran Price, Alternative Technology Association • 2018



# ENVIRONMENT & SUSTAINABILITY GRANTS TOTAL \$2.010M

## 3. Protecting aquatic eco-systems

### THRIVE

**Port Phillip Ecocentre** **\$39,375**  
Becoming a fit-for-purpose environment hub: change management planning

**Yarra Riverkeeper Association** **\$20,000**  
Multi year grant  
Total: \$60,000  
A Sustainable Association for a Sustainable Yarra

### INNOVATION - SCALING-UP

**Australian Marine Mammal Conservation Foundation** **\$75,000**  
Multi year grant  
Total: \$150,000  
Burrnan dolphins of Port Phillip Bay: Assessment

**Invasive Species Council** **\$40,000**  
Using environmental DNA sampling to determine the distribution of an exotic newt in Victoria



Australian Marine Mammal Conservation Foundation • 2018

### PROACTIVE

**Environmental Justice Australia** **\$14,714**  
River Laws and Indigenous Water Rights program

**Environmental Justice Australia** **\$12,553**  
Yarra Strategic Plan Community Roundtable

**Knox Environment Society** **\$ 5,000**  
Eel Video Project

**Port Phillip Ecocentre** **\$15,000**  
School Sustainability Festival: Bay Leaders Program

**University of New South Wales** **\$50,000**  
Fishways: Enabling Fish Migration and Movement

**Yarra Riverkeeper Association** **\$7,885**  
Protecting Waterway Corridors by Better Planning: Urban and Peri-Urban Stretches of Victorian Waterways



“  
**Participants learnt new skills in food production in a residential urban setting and have been inspired to put their new knowledge and skills into practice with increased food production in their own backyards.**  
”

Morgan Koegel, General Manager, 3000acres Grow

### INITIATIVE ENERGY EFFICIENCY

**Renew Technology** **\$75,000**  
Climate Resilient Homes

**Beyond Zero Emissions** **\$15,000**  
Baseline emissions tool – additional user functionality

**Beyond Zero Emissions** **\$37,700**  
Zero Carbon Factory

**Community Housing Federation of Victoria** **\$45,000**  
Enabling Energy transitions for Aboriginal Housing organisations

**Monash University** **\$49,685**  
LGA Emissions Profiles

### INITIATIVE FOOD SECURITY

**Cultivating Community** **\$100,000**  
Community Food Centre Expansion Project – Year 2

### INITIATIVE

**University of Technology Sydney** **\$77,549**  
Multi year grant  
Total: \$151,758  
Temperature-related thresholds for mortality

## Monash University: Climate Change Communication Research Hub



Lord Mayor’s Charitable Foundation has supported Monash University’s Climate Change Communication Research Hub (MCCCRH) to develop and provide fact-based, scientific information and evidence about how our climate is changing and the effects it is having on our community to media outlets.



The Foundation is now the major philanthropic partner of the Climate Change Communication Research Hub, with the aim of providing relevant, factual information and academic research to help combat myths about climate change.

In the past two years, the Climate Change Communication Research Hub has successfully developed partnerships with Seven TV News, ABC News, Weatherzone and Leader Community News, to develop the community’s understanding and increase knowledge about our changing climate.

Initially, researchers provided weather presenters including Jane Bunn of Seven TV News and Paul Higgins from ABC TV News, relevant climate change trend data to be included as part of their nightly weather segments.

The Climate Change Communication Research Hub has now partnered with Leader Community News to launch a new column *Changing Climates* which feature informative, fact-based infographics about local climate change.

*Changing Climates* has been incorporated in 23 local newspapers throughout Greater Melbourne. The column includes local climate data gathered from nine weather stations across the city. This will ensure that each of Leader’s 1.5 million weekly readers will receive climate information relevant to their local area. In collaboration with Weatherzone (which has 5 million online users), fortnightly videos are being aired that explain various climate trends and impacts.

View this story at [lmc.org.au/MCCCRH](http://lmc.org.au/MCCCRH)



Paul Higgins (ABC TV weather presenter) News Monash University Climate Change Communication Research Hub • 2018

## Energy Efficiency Grants to Community Housing Federation and Renew

As part of Lord Mayor’s Charitable Foundation commitment to supporting renewable energy sources, the Foundation has launched two projects that will have a positive effect on the health and wellbeing of low-income households.



Most of the housing in Victoria is not resilient or built to withstand extreme weather, impacting the health of vulnerable residents.



Our grant to Renew will advance the development of better designed homes that are resilient to and will reduce the impact of extreme climate. The positive benefits for households include improved health and comfort levels, lower bills, as well as reduced emissions.

Renew is advocating for improved energy efficiency standards and compliance of

new standards for sustainable housing in the 2022 review of the National Construction Code.

Community Housing Federation of Victoria has been working to develop resilient homes for members of its cooperatives. Supported by a grant from the Foundation, Community Housing Federation will assist Aboriginal Housing Victoria (AHV) to build their internal capacity of staff to assess, analyse and facilitated energy retrofits on behalf of Aboriginal cooperatives, who collectively manage 1,900 properties across Victoria. There will be significant training outcomes for AHV staff, who will learn

how to manage the energy assessment and retrofit processes to help deliver a positive outcome for each household.

The Foundation’s Program Manager for Environment & Sustainability, Daniel Padiaditis, said “The Foundation is prioritising energy efficiency and renewable energy for vulnerable households due to the multiple benefits they provide. These measures reduce energy poverty, health impacts and reduces emissions.”



3000acres Grow • 2019



Morgan Koegel, General Manager of 3000acres Grow said that there are exceptional gardens that were opened to the public to inspire and educate.

“Visitors saw how any garden can become a successful productive gardening space: big or small, owned or rented, long-term gardener or newcomer, there was something for everyone to learn and share their food growing knowledge.”

“Participants learnt new skills in food production in a residential urban setting and have been inspired to put their new knowledge and skills into practice with increased food production in their own backyards.”

“The Open Productive Gardens project is part of the Foundation’s commitment to supporting a sustainable food system for Melbourne.”

## 3000acres Grow

A recent grant to 3000acres Grow and a new partnership with Open Gardens Victoria has seen backyard farmers open their gates to visitors as part of an Open Productive Gardens learning project.



3000acres Grow is a not-for-profit organisation that works with community members, local councils and communities to develop urban agriculture in backyards, community gardens and community growing spaces to support local food production. They also run community harvest festivals and workshops on topics such as growing vegetables and fruit in backyards, urban beekeeping and preserving backyard harvests.



## Energy Efficiency and Climate Resilience in Vulnerable Households



### Initiative



### The challenge

#### Temperature-related death and illness is increasing

While most temperature-related deaths in Australia are attributed to cold weather, heat-related health impacts are rising. As the climate changes, the south east of the country is experiencing more frequent and intense heatwaves. Extreme heat kills more people in Australia than any natural disaster, causing more deaths since 1890 than bushfires, cyclones, earthquakes, floods and severe storms combined. Large urban areas can be much warmer than surrounding areas and in Greater Melbourne this Urban Heat Island effect is strongly correlated with areas of disadvantage. These effects are further amplified when housing is poorly constructed, not well-insulated and expensive to heat and cool. People with pre-existing health conditions, the elderly and the very young are particularly vulnerable.

#### Energy costs are rising, impacting the most vulnerable households

Low-income families, pensioners and other vulnerable people are under pressure from rising energy costs and face increasing difficulty paying electricity and gas bills. Retail electricity prices for households have increased by 80 to 90 per cent over the past decade and low-income households

are hardest hit, spending up to five times more (as a proportion of disposable income) on electricity than higher-income earners.

#### Victoria’s per capita greenhouse gas emissions are some of the highest in the world

Victoria’s per capita greenhouse gas emissions are among the highest in the world. This is primarily the consequence of emissions from energy. Victorians generate more greenhouse gas emissions per kilowatt hour of electricity than any other Australian state or territory and almost double the national average.

The poor energy efficiency of homes intensifies the issue. While all new homes in Victoria must comply with the compulsory 6-Star House Energy Rating, around 86 per cent were built before these stronger energy efficiency regulations were introduced in 2005. As a result, the average rating for houses constructed in Victoria before 2005 is 1.81 stars.

#### The opportunity

Energy efficiency and on-site renewables are cost-effective means of addressing all three of these challenges. These measures can reduce the cost of living for households, provide protection from both extreme heat and cold, while reducing Victoria’s significant energy-related greenhouse gas emissions.

### Our response

The Foundation is increasing the energy efficiency and climate resilience of vulnerable households to reduce the cost of living, reduce emissions and provide protection from both extreme heat and cold. Activities include energy upgrades, policy influence and research.

#### Energy upgrades

The Foundation is funding initiatives that directly increase the energy efficiency and climate resilience of vulnerable households, such as subsidy or retrofit programs. Currently, with the Brotherhood of St Laurence (BSL) we are developing a program that provides vulnerable households with energy efficiency and rooftop solar upgrades. BSL and the Foundation are specifically targeting low-income individuals with pre-existing health conditions that make them particularly at risk of temperature related health impacts.

#### Policy influence

The Foundation is working to improve the energy efficiency and climate resilience of vulnerable households by influencing relevant local, state and commonwealth policies, regulations and codes. A current example supports Renew to build a national coalition of more than 65 social, health and environment groups to help raise the energy performance of Australia’s homes.

This will lead to better designed, low emission housing that is more resilient to the changing climate, while reducing utility costs and improving health. In just over 12 months, they have made significant progress, including relevant State and National Ministers agreeing to the development of enhanced energy efficiency provisions for new residential buildings in the National Construction Code 2022.

**Research**

The Foundation is also undertaking research to better understand energy poverty, temperature related risks, residential greenhouse gas emissions and measures to reduce them.

Currently, we are supporting the University of Technology Sydney to determine the effect of extreme weather on mortality and health care service use. The research is identifying those who are most at risk as well as quantifying the extent to which extreme weather leads to higher health care demand and costs. An initial component of the research has found that extreme heat is a far greater threat for most Australians than extreme cold weather, with the risks falling largely on the elderly. This is an important contribution to the science, as historically governments have been focussed primarily on winter related health impacts.



**Food Security**

**Initiative**

**Cultivating Community Food Centre Expansion Project Year 2**

Food insecurity and social isolation are major concerns for those living in Public Housing Estates. Lord Mayor's Charitable Foundation partnered with Cultivating Community to establish Community Food Centres across 16 housing estates where Cultivating Community already manage community gardens.

The initiative extends the reach of the gardens, using them as a hub for many other food activities across the public housing estates, aiming to improve food security, social connectedness, improved physical health, employment opportunities through social enterprise and improved sustainability outcomes in the areas of food waste and composting.

These Community Food Centres provide a hub for a wide range of food related activities.

Over the past year the project has delivered 35 programs and activities engaging over 600 people from diverse backgrounds in growing, cooking, sharing and composting using urban agriculture and community food projects to improve food security, strengthen community, and increase sustainability.

For example, Australia's first Kitchen Equipment Library on the Carlton Public Housing Estate not only improves community food security but reduces individual consumption

of kitchen equipment and encourages sharing and the benefits of a sharing economy.

The After School Cooking and Gardening Program has expanded to four new public housing sites providing meals for and working with 75 children who are reporting that they have tried new foods, have cooked recipes at home and have an increased understanding about how to grow food, cook and compost.

Regular longstanding programs such as Meet and Eat Community Lunch and After School Cooking have continued to be delivered, as well as new initiatives such as the High Rise Community Baking Group which is utilising the wood fired oven in the community garden to bake bread for the Community Grocer market and celebrate baking cultures from around the world.

The project continues to improve community composting strategies, establish community cooking programs and explore the relationship between food projects, health and wellbeing, inclusion and sustainability. Cultivating Community are working across six Community Partnership Networks and have directly collaborated with over 20 agencies this year creating greater reach and combined impact.



Gather My Crew • 2018

**Lord Mayor's Charitable Foundation supports solutions to issues that affect the social and environmental health of our community - including the impact of climate change. We are committed to addressing the social isolation and disadvantage often experienced by older people.**

We also help build community resilience in the face of climate change and support social cohesion initiatives that give opportunities to marginalised young people to have ongoing connection to their community.



**PRIORITY:**

- 1. Addressing inequities in healthy ageing**
- 2. Building community resilience in the face of climate change**
- 3. Strengthening social cohesion and reducing discrimination**



**Harriet McCallum**  
Senior Program Manager  
Healthy & Resilient Communities



# HEALTHY & RESILIENT COMMUNITIES GRANTS TOTAL \$1.615M

## 1. Addressing inequities in healthy ageing

THRIVE	
<b>Blind Sports Victoria</b> A vision through Windows for improved health	<b>\$12,789</b> Multi year grant Total: \$65,950
<b>Bridges Connecting Communities</b> Inclusion Training Officer	<b>\$23,000</b>
<b>WIRE – Women's Information</b> Building resilience through better access	<b>\$40,000</b>
INNOVATION – SEED	
<b>Peninsula Transport Assist</b> One Community	<b>\$30,000</b>
<b>Sunbury Community Health Centre</b> Physical Activity Pathways Model	<b>\$30,000</b>
INNOVATION – SCALING-UP	
<b>Guide Dogs Victoria Alliance</b> Assistive navigation technologies	<b>\$80,000</b> Multi year grant Total: \$180,000
PROACTIVE	
<b>Veritas Health Innovation</b> Building the long-term sustainability of the Covidence mission	<b>\$100,000</b> Multi year grant Total: \$200,000
<b>Veritas Health Innovation</b> Covidence: scaling up to increase the impact of health research	<b>\$75,000</b> Multi year grant Total: \$150,000

## 2. Building community resilience in the face of climate change

INNOVATION – SEED	
<b>Jumpleads NFP</b> Ramp Up Resilience – A Central Victorian Pilot	<b>\$40,000</b>
INNOVATION – SCALING-UP	
<b>ECHO Youth &amp; Family Services</b> Ready2Go Disaster Resilience Program	<b>\$36,000</b> Multi year grant Total: \$106,000
<b>Western District Health Service</b> Primary Care Partnerships for Community Resilience (PCP4CR)	<b>\$65,000</b> Multi year grant Total: \$130,000
PROACTIVE	
<b>Australian Youth Climate Coalition</b> AYCC Victoria Training Program	<b>\$14,000</b>
<b>Climate and Health Alliance</b> CAHA – capacity building project	<b>\$100,000</b> Multi year grant Total: \$200,000
<b>Women's Health Coulburn North East</b> Long-term Disaster Resilience	<b>\$15,000</b>



Liiban and Nyaduoth, Life Saving Victoria • 2018

“  
**It's a wonderful two-way learning experience. Through our aged care partners, we provide spaces and opportunities for older people to share their experience, knowledge and skills with our young people, who in turn, develop more open and positive attitudes towards older community members.**  
”

Anna Donaldson, Chief Executive Officer, Life Experience Enterprises



# HEALTHY & RESILIENT COMMUNITIES GRANTS TOTAL \$1.615M

## 3. Strengthening social cohesion and reducing discrimination

THRIVE	
<b>B'nai B'rith Courage to Care (Vic)</b> Volunteer Management Capacity Building	<b>\$30,000</b>
<b>Footscray Community Arts Centre</b> Accessing FCAC's venue in the Cloud	<b>\$16,000</b>
<b>Melbourne Fringe</b> Increasing Access & Inclusion-Artists with Disabilities	<b>\$20,000</b> Multi year grant Total: \$76,000
<b>Melbourne Fringe</b> Melbourne Fringe Trades Hall Space to Create	<b>\$30,000</b>
<b>Music Broadcasting Society Of Victoria</b> Stage 3 – Technical Upgrade Project	<b>\$35,000</b> Multi year grant Total: \$112,000
<b>State of Being Foundation</b> Strengthening our Service from the Inside Out	<b>\$21,000</b>
<b>Student Youth Network</b> Moving Up, Moving Out: tech infrastructure upgrade	<b>\$19,600</b> Multi year grant Total: \$72,306
<b>Western Edge Youth Arts</b> WEYA's Art of Measurement Project	<b>\$20,000</b> Multi year grant Total: \$40,000
<b>Women's Circus</b> Connecting Women through Circus	<b>\$20,000</b> Multi year grant Total: \$55,000
INNOVATION – SEED	
<b>Jesuit Social Services</b> Just Stories – The Artful Dodgers Podcast	<b>\$50,000</b>
INNOVATION – SCALING-UP	
<b>Flemington &amp; Kensington Community Legal Centre</b> The Walking Alongside Program	<b>\$85,000</b> Multi year grant Total: \$150,000
<b>Victoria University</b> Devolving Aspire: Young Muslim Women's Governance and Leadership Program	<b>\$150,000</b> Multi year grant Total: \$280,000
PROACTIVE	
<b>Centre for Australian Progress</b> Progress Labs – Bespoke capacity building support for 15 new organisations	<b>\$68,000</b> Multi year grant Total: \$136,000
<b>Gather My Crew</b> 'Gather My Crew' – Sustainable Business Model	<b>\$60,000</b> Multi year grant Total: \$90,000
<b>Human Rights Law Centre</b> Charter of Rights: Community Engagement	<b>\$25,000</b>
<b>Justice Connect</b> Not-for-profit Law Training – Marketing and Development	<b>\$50,000</b> Multi year grant Total: \$100,000
<b>Naomi Milgrom Foundation</b> MPavillion 2018/19	<b>\$25,000</b>



Pam and Florence, ECHO Youth & Family Services participants • 2018

### INITIATIVE HEALTH & CLIMATE CHANGE HOT SPOTS

<b>Cohealth</b> Hot Spots – Inner Melbourne	<b>\$60,000</b>
<b>IPC Health</b> Hot Spots – Brimbank	<b>\$60,000</b>
<b>SEHCP</b> Hot Spots – Dandenong	<b>\$60,000</b>

### INITIATIVE HEALTH & CLIMATE CHANGE

<b>Foundation for Rural and Regional Renewal</b> Disaster Resilient Future Ready Victoria	<b>\$50,000</b> Multi year grant Total: \$150,000
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Initiative



**Health & Climate Change – Hot Spots**



Across Greater Melbourne, communities are becoming more resilient thanks to Hot Spots, a new initiative launched by Lord Mayor’s Charitable Foundation.

With the increasing frequency and intensity of extreme weather events, Hot Spots provides funding to health and community organisations to proactively support their communities.

Using the Monash Heat Vulnerability Index, the Foundation identified key areas in Melbourne with higher temperatures during heatwaves along with higher levels of socioeconomic disadvantage, and invited applications for funding from not-for-profit organisations already working in health and community service sectors.

The Foundation’s Senior Program Manager for Healthy & Resilient Communities Harriet McCallum said that Hot Spots supports collaborations between community health, social service organisations, local government and emergency services in areas requiring more intensive community care during extreme heat.

“We provided funding to enliven in Greater Dandenong and IPC Health in Brimbank. Both organisations have brought together a diverse range of project partners to develop local responses to the health impacts of heatwave. We recognised that these impacts are disproportionately felt by those experiencing disadvantage.”

“Our funding provides the backbone support required to enable these community networks to grow and to test their program.”

In Dandenong, enliven’s project is a collaboration between City of Greater Dandenong, Southern Migrant & Refugee Centre and Bolton Clarke. The health promotion activities focused on community members who are vulnerable on days of extreme heat including newly arrived migrants, older people and parents with babies and young children. IPC Health also focused on younger and older residents, especially those residents with culturally and linguistically diverse (CALD) backgrounds who

may not understand health messages in English, to increase heat health literacy and prevent the health impacts caused by extreme heat.

Brimbank City Council’s Environment and Sustainability team has also conducted a heat-mapping project, measuring surface heat temperature. This mapping has identified areas in St Albans and Sunshine West that need investment for the development of blue (water) and green (trees and vegetation) infrastructure to help cool these areas.

The Foundation has made a recent grant to cohealth to assess and address issues associated with extreme heat events for older tenants living in high-rise public housing estates in Carlton, North Melbourne and Kensington. The aim is to prepare and protect vulnerable older people from the health issues experienced during extreme heat.



**Health & Climate Change – Future Ready**

Initiative



The National Strategy for Disaster Resilience Australia states that Australia is experiencing an increase in frequency and intensity of large-scale natural disasters as climate change makes weather patterns more extreme and unpredictable. In turn, the economic and social costs of natural disasters are increasing.



In 2015, the estimated total cost of natural disasters in Australia exceeded \$9 billion and is estimated to reach \$33 billion by 2050. Communities play a critical role in planning for and responding to these events. An evidence base of methods, tools and approaches needs to be developed to support communities as they seek to build their resilience and be future ready. In 2017, Foundation for Rural and Regional Renewal (FRRR) launched their national Disaster Resilient: Future Ready project, a collaborative, applied research project to understand how different types of communities can build their capacity to plan for, respond to and recover from the impacts of natural disasters.

FRRR has extensive experience supporting communities across the country recover from all types of natural disasters. This national initiative has been developed through FRRR’s experience that communities that work collaboratively across sectors, are inclusive and support community leadership development have greater capacity to prepare for and respond to natural disasters.

Lord Mayor’s Charitable Foundation has provided three years of funding for the Victorian component of this national project. This funding will support the documentation of community disaster resilience best practice research and action, engagement with eight Victorian communities with differing strengths and vulnerabilities when it comes to natural hazards, in-depth work with three Victorian pilot communities to collaboratively develop tools, methods and processes to understand and strengthen resilience and adaptation to the impact of natural disasters on social, economic and environmental conditions.

Pilot communities will contribute their experiences to an evidence-based suite of community led preparedness and resilience building initiatives that can be scaled into like communities. The Foundation sits on the Disaster Resilience: Future Ready National Reference Group that oversees the initiatives planning and delivery.





Gather My Crew participants • 2018

## Gather My Crew



Lord Mayor's Charitable Foundation provided funding to Gather My Crew to develop an online tool that can help people in times of trauma and crisis.



The simple online tool develops a support 'crew' of family and friends for people experiencing crisis or trauma. People in need of help use the online tool to coordinate help requests and offers of support in an interactive and easy to use calendar. Help is very practical and can consist of everyday activities such as school drop-off and pick-ups, household cleaning, meals or assistance with medical appointments.



Since its launch, Gather My Crew has grown to attract over 6,000 users and has developed referral relationships with some of Australia's most well-regarded community organisations including Cancer Council, Stroke Foundation, Heart Foundation, Vic Health, and connected with local councils across Greater Melbourne who refer residents to the online tool.

With an additional grant from the Foundation, Gather My Crew will implement Phase Two of the second phase of its business plan to become a self-funded, not-for-profit organisation.

The project involves providing the unique technology to Australian companies to integrate into their employee wellness, support and employee assistance programs.



Linda and Jodie, Gather My Crew participants • 2018

Recent research indicates that those employees going through difficult times want to continue to maintain as 'normal' a life as possible and, for many, this includes continuing to work.

▶ View this story at [lmcf.org.au/Gather-my-Crew](https://lmcf.org.au/Gather-my-Crew)



Lively participants • 2018

## Lively: Intergenerational Technology

A unique and innovative solution that addresses both youth unemployment and social isolation for older people has recently been funded by Lord Mayor's Charitable Foundation.



With social isolation and digital exclusion a real issue for many older people, this new program brings young and older people together for shared learning experiences.

Lively trains and employs young jobseekers aged 18 to 25 to provide services that help older people aged 65 years or over stay socially connected, active and independent in their everyday lives.

Anna Donaldson, Chief Executive Officer at Life Experience Enterprises (Lively), says the grant from the Foundation will enable her to scale-up Lively to employ more young people and increase new opportunities for older people to engage with young people and the community.

Ninety-five per cent of older people who have participated in Lively reported increased feelings of social connectedness and improved technology skills.

In addition to equipping older people with digital skills, the service model is designed to facilitate meaningful interactions between young and older community members.

"It's a wonderful two-way learning experience. Through our aged care partners, we provide spaces and opportunities for older people to share their experience, knowledge and skills with our young people, who in turn, develop more open and positive attitudes towards older community members."

Lively has already had great success with reports showing increased social connectedness and inclusion for older people, while young people have gained improved confidence and employability skills, as well as improved attitudes to ageing and interest in aged care careers.



Lively participants • 2018

Within the next year Lively hopes to involve 750 older people and provide 45 young people with employment. Ninety-five per cent of young people who are employed by Lively have improved confidence, self-esteem and employability skills, and 15 per cent have gone on to pursue careers in aged care.

▶ View this story at [lmcf.org.au/Lively](https://lmcf.org.au/Lively)



# HOMELESSNESS & AFFORDABLE HOUSING

Frontyard, Melbourne City Mission • 2019

**Lord Mayor's Charitable Foundation understands that safe, stable, affordable housing can lead to better education and employment outcomes, as well as stronger social networks. Each year we continue to seek out innovative solutions to overcome entrenched homelessness and find new ways to develop and provide affordable housing.**

The Foundation aims to prevent long-term homelessness through early intervention housing support services and increasing the supply of appropriate affordable housing with grantmaking and impact investment tools.



**Erin Dolan**  
Program Manager  
Homelessness & Affordable Housing



## PRIORITY:

- 1. Increasing the supply of affordable housing**
- 2. Early intervention to prevent entry into and entrenchment in homelessness**



# HOMELESSNESS & AFFORDABLE HOUSING GRANTS TOTAL \$3.092M

## 1. Increasing the supply of affordable housing

### THRIVE

**Victorian Women's Housing Association** \$37,000  
Increasing the capacity of our social enterprise, Property Initiatives Real Estate

### PROACTIVE

**Community Housing Federation of Victoria** \$6,540  
Quality in my backyard scoping workshop

**Community Housing Federation of Victoria** \$50,000  
Understanding the barriers and success factors for new social housing developments

**Council to Homeless Persons** \$80,000  
Multi year grant Total: \$160,000  
Housing First Europe

**Deakin University** \$50,000  
Grey nesters: testing viability of affordable small houses for those with limited funds & seeking modestly-sized homes

**HANZA** \$6,325  
Business development via The Difference Incubator

**St Kilda Community Housing** \$20,000  
Project (tenancy) management of Arcadia

**Victorian Women's Housing Association** \$21,243  
Listen4Good Pilot Program

### SIGNATURE

**Housing Choices Australia** \$1,000,000  
Affordable Housing Challenge

**Housing Choices Australia** \$500,000  
Housing Choices – Nightingale Village

**Launch Housing** \$400,000  
Family Supportive Housing Project

## 2. Early intervention to prevent entry into and entrenchment in homelessness

### THRIVE

**Knox Infolink** \$40,000  
The Umbrella Sustainable Partnerships Project

**Women's Information, Support & Housing in the North** \$40,000  
Ready to Thrive

### INNOVATION - SEED

**Community Housing Federation of Victoria** \$50,000  
Through tenant eyes – measuring the social impacts of community housing

**Penington Institute** \$50,000  
Breaking the cycle: opioid dependence and housing instability

**RMIT University** \$49,785  
Pregnancy and homelessness: Women's perspectives on early intervention and a cross-sector forum

### INNOVATION - SCALING-UP

**Barwon Child, Youth & Family** \$50,000  
Multi year grant Total: \$100,000  
Foster Carer Recruitment and Retention Project

**Justice Connect** \$150,000  
Multi year grant Total: \$300,000  
Project Powerhouse

**Mental Health Legal Centre** \$100,000  
Multi year grant Total: \$200,000  
Partners in the Community – MHLCC & RDNS HPP HJP

**Sacred Heart Mission St Kilda** \$150,000  
Multi year grant Total: \$300,000  
Realising the Vision of Journey to Social Inclusion (J2SI): ending chronic homelessness

**Westjustice** \$149,417  
Multi year grant Total: \$298,834  
Restoring Financial Safety: transforming financial security

### PROACTIVE

**Housing for The Aged Action Group** \$88,000  
Recognising and Responding to People at Risk of Homelessness

**McAuley Community Services for Women** \$38,000  
The McAuley Mercy Project Evaluation

**Melbourne City Mission** \$100,000  
Multi year grant Total: \$250,000  
The Frontyard Disruptive Model – Youth homelessness

**RMIT University** \$45,418  
Multi year grant Total: \$140,383  
Maximising Impact: A unique longitudinal study of new social housing residents

“  
**With the support of Lord Mayor's Charitable Foundation, we are substantially improving our clients' financial security and recovery which prevents them entering a cycle of poverty and homelessness.**  
”

Denis Nelthorpe, Westjustice  
Chief Executive Officer

### VincentCare: Ozanam House



Lord Mayor's Charitable Foundation provided a Signature Grant of \$600,000 to VincentCare towards the redevelopment of Ozanam House in 2016. This redevelopment is the first of its kind in Victoria, enabling VincentCare to more effectively respond to adults who have experienced homelessness and ongoing financial and social disadvantage.

The new Ozanam House has increased the supply of affordable housing to include crisis accommodation responses, transitional accommodation for men and women who are recovering from a period of homelessness and long-term independent living units for men and women aged over 50 who have experienced homelessness.

All units include separate bathroom facilities and storage facilities, and some include separate kitchenettes allowing for privacy and self-sufficiency.

The grant from Lord Mayor's Charitable Foundation assisted VincentCare to pursue other funding from government and philanthropic organisations. The new Ozanam House welcomed residents in June 2019.

Ozanam House • 2019



▶ View this story at [lmcf.org.au/Ozanam-House](https://lmcf.org.au/Ozanam-House)

## Affordable Housing Challenge

### Initiative

Homelessness and the lack of affordable housing is one of Greater Melbourne's biggest challenges. There are more than 24,000 people currently experiencing homelessness in Melbourne, and many more living under housing stress. Only one per cent of rental properties affordable to households on government benefits. People who are homeless or in housing stress include those living with complex mental health or drug and alcohol issues, women and children escaping family violence, older people living in long term income poverty, and young people without a stable home, among others.



Lord Mayor's Charitable Foundation Affordable Housing Challenge is aimed at encouraging cross sectoral solutions and leveraging other sources of finance to increase the supply of affordable housing in Greater Melbourne. The Foundation has provided a \$1 million grant and, if required, an opportunity for a \$2 million impact investment through Social Enterprise Finance Australia (SEFA).

The Challenge will focus on housing for people facing financial disadvantage including young people, older people, families, people with disabilities or mixed communities.

The Challenge will demonstrate a scalable and replicable solution to providing affordable rental housing through a collaboration between a community housing association, philanthropy and local government.

Following a site selection process, which ensured the site was well located near public transport, shops, health and community services, and public space, the City of Darebin was chosen as our site partner. City of Darebin has a strong commitment to increasing affordable housing within its municipality. City of Darebin is now completing its formal Request for Proposal process.



### WEstjustice: Restoring Financial security



Lord Mayor's Charitable Foundation continues to support organisations who are assisting women leaving family violence situations to re-establish and rebuild their lives.

A recent grant to WEstjustice has enabled the organisation to partner with McAuley Community Services for Women to integrate its financial counselling and legal support services across Melbourne's western suburbs.



WEstjustice works with clients to resolve and prevent the escalation of legal and financial problems arising out of family violence.

WEstjustice Chief Executive Officer Denis Nelthorpe said, "Women who leave family violence have also experienced economic abuse and are often unable to work through their financial issues on their own."

"Our clients have incurred many unpaid bills in their name that have been accumulated by an ex-partner. We have so many cases where an ex-partner has deliberately and maliciously incurred fines or not paid the rent or utility bills so that it is difficult for a woman to leave the relationship.

"WEstjustice advocates on behalf of our clients to have these unpaid bills and fines waived, which then provides an opportunity for them to start their lives again free from their ex-partner's debt."

WEstjustice has also been working extensively with business sectors to bring about effective system change and lasting reforms so that women who have been economically abused are not penalised.

"With the support of Lord Mayor's Charitable Foundation, we are substantially improving our clients' financial security and recovery which prevents them entering a cycle of poverty and homelessness."



### Sacred Heart Mission: J2SI

With a new grant from Lord Mayor's Charitable Foundation Sacred Mission will establish a J2SI Evaluation and Learning Centre (ELC) that will enable the successful replication and delivery of J2SI social services to organisations across Australia working to end chronic homelessness.



In 2009 Lord Mayor's Charitable Foundation, provided a Signature Grant of \$750,000 to Sacred Heart Mission to fund an innovative new program that would reduce the impacts of long-term and entrenched homelessness.

The program titled *Journey to Social Inclusion (J2SI)* provides intensive wrap-around support to people who are homeless and assists them to find and maintain a secure safe home, training to find employment, healthcare and counselling support. This program was evaluated by RMIT to provide evidence of the impact of this model.

Ten years later the J2SI program is now regarded as an effective and successful model in reducing entrenched homelessness and assisting people to rebuild their lives.

The scaling of J2SI will give thousands of people the same chance to obtain these life-changing opportunities in housing, health and employment, and reduce chronic homelessness in Australia.



Sacred Heart Mission St Kilda • 2018



## INSPIRING PHILANTHROPY

'Inspiring Philanthropy' has been the Foundation's positioning statement since our rebrand in 2013 and with just two words, the statement elegantly expresses a duality of meaning.

At Lord Mayor's Charitable Foundation, we work with a range of partners and activate the many tools within the Philanthropy Toolbox to undertake and produce inspiring examples of philanthropic work. We also motivate passionate donors, grant partners and the broader community to think about their role in the community and the opportunity they have to support the issues they care most about. 'Inspiring Philanthropy' is at the heart of everything we do.

Grants in this area support the growth of philanthropy, social enterprise, or the capacity of the charitable sector to adopt and remain relevant in a fast changing world.

### INSPIRING PHILANTHROPY GRANTS

PROACTIVE	
<b>Abbotsford Convent Foundation</b> Abbotsford Convent Master Plan Project	<b>\$78,000</b>
<b>Australian Environmental Grantmaker's Network</b> AEGN Gift Fund	<b>\$15,000</b>
<b>Impact Investing Australia</b> Scaling Impact	<b>\$125,000</b> Multi year grant Total: \$375,000
<b>Melbourne Business School</b> For-Purpose Executive Leadership Program	<b>\$100,000</b> Multi year grant Total: \$300,000
<b>Swinburne University of Technology</b> Strengthening the Not-for-profit Sector: Data for Good Sandpit	<b>\$100,000</b>
<b>The Conversation Trust</b> The Conversation Cities	<b>\$50,000</b> Multi year grant Total: \$150,000

## Collier Charitable Fund

Guest speaker Samantha Mostyn, Chair of Australian Women’s Donor Network inspired guests by sharing her insights on the important contribution women have made to Australian philanthropy and the need for more data on the specific needs of women.



The Collier Charitable Fund was set up in 1954 under the wills of Alice, Edith and Annette Collier and has become an integral part of Melbourne’s philanthropic history.

In May 2019 the Collier Charitable Fund celebrated an important milestone: \$102 million in grants made to charitable and not-for-profit organisations across Victoria since 1954.

Lord Mayor’s Charitable Foundation has been a beneficiary of the Collier sisters’ philanthropy through the Collier Charitable Fund.

Lord Mayor’s Charitable Foundation was delighted to celebrate with Collier Charitable Fund on this remarkable milestone at their event held at the State Library.

Lord Mayor’s Charitable Foundation’s Chief Executive Officer Dr Catherine Brown said, “We are delighted to honour the Collier sisters Alice, Edith and Annette for their enormous and wonderful contribution to the wellbeing of Melbourne. They have inspired Australian philanthropy, especially in Melbourne, for many decades.

“We are privileged to be a beneficiary of the Collier bequest. Together we share 65 years of supporting the people of Melbourne especially in health, education and community development.”



Top: Guest speaker Samantha Mostyn • 2019  
Bottom: Amanda Milledge (Chair, Collier Charitable Fund), Wendy Lewis (CEO, Collier Charitable Fund), Julie Reilly (CEO, Australian Women Donors Network), Samantha Mostyn (Chair, Australian Women Donors Network) and Dr Catherine Brown (CEO, Lord Mayor’s Charitable Foundation) • 2019



Youth in Philanthropy Forum • 2018

## Youth in Philanthropy



Inspiring philanthropy is at the heart of Lord Mayor’s Charitable Foundation’s commitment to inspire the next generation of giving.



Since 2002, Youth in Philanthropy (YiP) has been an important program within the Foundation’s community engagement program and Trinity Grammar School’s Youth in Philanthropy mentor Mr Tony Scott has been on the journey from the very beginning.

In fact, Mr Scott was instrumental in introducing Youth in Philanthropy to Lord Mayor’s Charitable Foundation and launching the program for the first time in 2002.

Before joining the Foundation’s Board, Mr Scott was a member of the Marketing Committee and first became aware of the Youth in Philanthropy program being run by United Way in Edmonton, Canada.

“When we were first exposed to Youth in Philanthropy, we immediately saw the benefit of the program being run by Lord Mayor’s Charitable Foundation.

“Following the Board’s approval of the proposal we invited four schools to participate in the first year – University High School, St Michael’s, Melbourne Grammar and Melbourne High School.

“It’s remarkable to think seventeen years have passed now, and that some of those very first Youth in Philanthropy students will now be in their mid-thirties, some with families of their own” Mr Scott exclaimed.

“From my perspective, Youth in Philanthropy is an invaluable program for young people to be involved in. It allows students to look at situations and circumstances twice, see the world around them a little more clearly and understand the positive role philanthropy has. It is really encouraging to see the Foundation actively



engaging the students to have them consider setting up a Charitable Fund Account with their family.”

Mr Scott added, “Participating in Youth in Philanthropy will no doubt have a lasting impact on the students in years to come.”



Tony Scott, YiP coach for Trinity Grammar School • 2019

## William Angliss Charitable Fund

Lord Mayor’s Charitable Foundation is named in the will of Sir William Angliss and receives annual support, most recently for the Youth in Philanthropy program and emerging relief (food security). The Foundation values our long relationship with the William Angliss Charitable Fund.

YLAB at Youth in Philanthropy





Hannah Colman (Co-founder and General Manager of Scarf Community) at YIP Forum • 2018



Trinity Grammar School at YIP Insights Event • 2018



Australian International Academy at a YIP charity visit • 2018



Carrum Downs Secondary College at YIP Insights Event • 2018

## YOUTH IN PHILANTHROPY GRANTS 2018 TOTAL \$213,549

### Education & Employment

#### AUSTRALIAN INTERNATIONAL ACADEMY

Career Trackers	\$3,000
Save the Children	\$3,000
The Bridge	\$4,000

#### BRIGHTON GRAMMAR SCHOOL

Ardoch Foundation	\$1,625
Enable	\$7,875
Ladder Project Foundation	\$500

#### HAILEYBURY COLLEGE

Opening the Doors Foundation	\$982
The Malpha Institute	\$8,518
Waverley Industries	\$500

#### MAC.ROBERTSON GIRLS' HIGH SCHOOL

Andrew Dean Fildes Foundation (SHINE)	\$2,612
Ardoch	\$2,900
Careertrackers Indigenous Internship Program	\$5,500

#### MELBOURNE GIRLS' COLLEGE

Bayley House	\$4,500
HoMie Street Store	\$3,000
Western Chances	\$2,500

#### METHODIST LADIES COLLEGE

Centre for Multi-Cultural Youth	\$5,000
Community Hubs Australia	\$1,500
Gateways Support Services	\$3,500

#### PARADE COLLEGE

Ardoch	\$3,093
Fitted for work	\$6,293
Scarf	\$1,500

#### WERRIBEE SECONDARY COLLEGE

Opening the Doors	\$5,000
The Song Room	\$2,500
Youth Development Australia	\$2,500

### Environment & Sustainability

#### CAMBERWELL GRAMMAR SCHOOL

Alternative Technology Association	\$915
Abbotsford Convent Foundation	\$9,000
Beyond Zero Emissions Inc	\$6,585

#### HUME CENTRAL SECONDARY COLLEGE

Australian Conservation Foundation	\$3,500
Australian Marine Mammal Conservation Foundation	\$2,000
Beyond Zero Emission	\$4,500

#### MT SCOPUS MEMORIAL COLLEGE

Climate Works Australia	\$4,500
Cultivating Community	\$4,500
Fareshare Australia	\$1,000



Melbourne Girls' College at a YIP charity visit

### Healthy & Resilient Communities

#### LAURISTON GIRLS' SCHOOL

e.motion21	\$7,000
Guide Dogs Victoria	\$1,500
Victorian Immigrant and Refugee Women's Coalition	\$1,500

#### IVANHOE GRAMMAR SCHOOL

Circus Australia	\$500
Odyssey House	\$4,500
Western Community Legal Centre	\$5,000

#### MELBOURNE HIGH SCHOOL

Asylum Seeker Resource Centre	\$6,100
Open Family Australia	\$1,200
Scope Australia	\$2,700

#### RINGWOOD SECONDARY COLLEGE

Cultivating Community	\$7,000
Guide Dogs Victoria	\$2,000
Kids Own Publishing	\$1,000

#### TRINITY GRAMMAR SCHOOL

SYN Media	\$3,000
The Reach Foundation	\$2,000
Westside Circus	\$5,000

### Homelessness & Affordable Housing

#### CARRUM DOWNS SECONDARY COLLEGE

Conscious Creative	\$3,000
St Mary's House of Welcome	\$3,700
The Lighthouse Foundation	\$3,300

#### MELBOURNE GRAMMAR SCHOOL

SalvoCare Eastern	\$5,000
The Reach Foundation	\$6,000
The Salvation Army Crisis Services	\$1,000

#### THE KING DAVID SCHOOL

Kids Under Cover	\$6,000
The Ladder Project Foundation	\$3,500
Women's Housing	\$3,251

#### UNIVERSITY HIGH SCHOOL

Royal District Nursing Service trading as Bolton Clarke	\$6,240
Safe Steps Family Violence Response Centre	\$1,248
Women's Property Initiatives	\$2,912



Carly Findlay (Access & Inclusion Coordinator at Melbourne Fringe Festival and guest speaker) at YIP Insights • 2018

“  
I learnt so much! Feel very empowered as a young person to make change and contribute to philanthropy throughout my life.  
Starting now!

”  
YiP Participant

“  
I learnt what philanthropy was, and how bad the issues are around Melbourne, and how we can help that through this program  
”

”  
YiP Participant

# BUILDING KNOWLEDGE



Vital Conversations: Giving Older Women in Greater Melbourne a Voice report • 2019



Associate Professor Susan Feldman and Dr Harriet Radermacher • 2019



Panel discussion at Asian-Australian Diaspora Philanthropy Launch Event • 2018

## Vital Conversations with Older Women

Older women were given the opportunity to provide their insights and share their experiences about living in Greater Melbourne as part of research conducted by Lord Mayor's Charitable Foundation.

As part of Lord Mayor's Charitable Foundation's commitment to creating and sharing knowledge, the new research *Vital Conversations: Giving Older Women in Greater Melbourne a Voice* was launched as part of International Women's Day in March. Lord Mayor's Charitable Foundation wanted to hear directly from older women about their lives, the challenges they face and potential solutions.

The research highlights seven key themes important to older women as they age, including social connectedness, neighbourhood development and infrastructure, financial security and housing, family and generational change, ageism and abuse, volunteering and advocacy, information and technology.

*Vital Conversations* provides deeper insights about the findings of the *Greater Melbourne Vital Signs 2017* research which indicated that older women were facing challenges and, in some cases, extreme disadvantage across diverse aspects of their lives.

The Foundation commissioned Associate Professor Susan Feldman and Dr Harriet Radermacher to conduct the research.

Some of the key insights reported:

- Social connectedness and a sense of belonging coupled with concepts of autonomy, choice and respect are key to the health and wellbeing of older women.
- Housing insecurity is increasing and of prime concern to older women.
- Family breakdown and abuse of older women is a hidden issue requiring immediate attention.
- The extensive volunteering activities of older women provide meaningful and invaluable contributions to community.
- Whilst involvement in volunteering activities provides older women with a sense of purpose and belonging, there is the potential for exploitation and abuse.

Read the report at [lmcf.org.au/VitalConversations](http://lmcf.org.au/VitalConversations)



Guests at the Vital Conversation Launch Event • 2019

## Asian-Australian Diaspora Philanthropy

In early 2018, Lord Mayor's Charitable Foundation commissioned Emeritus Professor John Fitzgerald and Wesa Chau at Swinburne University's Centre for Social Impact to investigate the giving traditions and philanthropy of Asian-Australian donors in Melbourne.

The *Asian-Australian Diaspora Philanthropy* research report focused on four key diaspora communities including Chinese-Australians, Indian-Australians, Filipino-Australians and Chinese-Malaysian Australians.

The Foundation's Chief Executive Officer Dr Catherine Brown said, "As a community foundation it is important that we understand the giving traditions and aspirations of Melbourne's donor communities. From this report we can also further develop our relationship with current donors and those wishing to embark on a philanthropic journey with us."

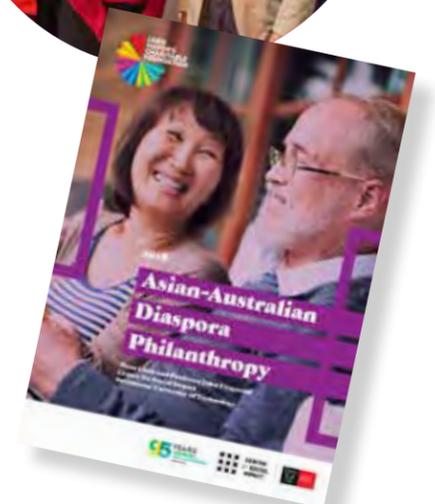
Researcher Wesa Chau said the Asian-Australian diaspora was very active but not well-recognised in mainstream Australian society.

"This report highlights that Asian-Australians contribute in every way in Australia, including charity and philanthropy. They already give a lot and want to contribute more. They are also keen to engage with mainstream philanthropy and eager to learn how to give more effectively."

"There are many opportunities for not-for-profit organisations to engage with Asian-Australian donors as well as recognising the positive contribution they are making in communities across Melbourne."

Read the report at [lmcf.org.au/Asian-Australian-Diaspora-Philanthropy](http://lmcf.org.au/Asian-Australian-Diaspora-Philanthropy)

From left to right: Dr Catherine Brown, Wesa Chau, Emeritus Professor John Fitzgerald and Misha Ketchell (Editor & Executive Director at The Conversation and event panel host) at Asian-Australian Diaspora Philanthropy Launch Event • 2018



Asian-Australian Diaspora Philanthropy report • 2018

## Inspiring Philanthropy Oration with Fred Blackwell

Lord Mayor's Charitable Foundation was delighted to welcome Fred Blackwell, Chief Executive Officer of The San Francisco Foundation (TSFF) in November 2018 as our guest of honour and orator at our 95<sup>th</sup> anniversary *Inspiring Philanthropy Oration* event.



Guest speaker Carmel Guerra OAM at Inspiring Philanthropy Celebration Event • 2018

Fred Blackwell spoke about TSFF's campaign titled *People, Place and Power* which has put social justice, race and equity at the forefront of their grantmaking programs. This new campaign was developed in response to the current and emerging issues facing the city. San Francisco is experiencing a crisis in homelessness and affordable housing, as well as other issues including residents facing barriers accessing education and employment, and social cohesion.

Our guests had an opportunity to ask Fred Blackwell questions during a Q&A session facilitated by Misha Ketchell, Editor at The Conversation. Guests were presented key insights into a foundation's balance of programs versus advocacy, the critical need for rich data, what the most accurate application of meritocracy should be and an ever present issue of gender inequality.

The Foundation also organised a workshop with Fred Blackwell for Australian Community Philanthropy's 2018 Annual Conference.

Misha Ketchell (Editor & Executive Director at The Conversation and event panel host, Carmel Guerra OAM (CEO of Centre for Multicultural Youth), Dr Catherine Brown (CEO) and Fred Blackwell (CEO at The San Francisco Foundation) at Inspiring Philanthropy Oration • 2018



## Inspiring Philanthropy Celebration with Carmel Guerra OAM

The 95<sup>th</sup> anniversary event *Inspiring Philanthropy Celebration* with guest speaker Carmel Guerra OAM, Chief Executive Officer at the Centre for Multicultural Youth (CMY), was celebrated at the Melbourne Town Hall with guests representing the not-for-profit and philanthropic sectors, as well as the Foundation's donors, supporters and grant partners.

Each year the Foundation invites high profile speakers to deliver an oration to inspire and inform Melbourne's community about exciting projects and programs undertaken by the philanthropic and not-for profit sector.

Carmel shared her engaging personal story about her journey from youth worker to founder and Chief Executive Officer of CMY. Carmel encouraged Melbourne to be a welcoming and inclusive city for young people from newly arrived and migrant communities and encouraged guests to continue their support of the work undertaken by the Foundation in education and employment.

## SWANSON SOCIETY

### Your community, your legacy

Lord Mayor's Charitable Foundation has grown into one of Australia leading philanthropic organisations thanks to our incredible donors who have over the past nine decades chosen to leave gifts in their wills.



A bequest to the Foundation leaves a legacy that creates positive perpetual social change in communities across Greater Melbourne in perpetuity.

The Swanson Society, named in honour of the Foundation's Founding Lord Mayor, Sir John Swanson, recognises our valued donors and supporters who have chosen to leave a gift in their will to Lord Mayor's Charitable Foundation.

The annual Swanson Society lunch and other events are opportunities for the Foundation to show our appreciation to donors in their lifetime. We are most grateful to our bequestors for their forward thinking and their commitment to supporting the Melbourne community into the future.



Top: Guest speaker Associate Professor Susan Feldman at Swanson Society Lunch • 2019

Centre: From left to right: Robert McGauran (Board), Robert Masters (Former Board Chair), Jane Hansen (Board), Dr Susan Feldman (Guest Speaker), Emeritus Professor Peter Chandler (Former Board Chair), Former Lord Mayor Winsome McCaughey AO, Dr Catherine Brown (CEO), Dr Sandra Hacker AO (Deputy Chair) at Swanson Society Lunch • 2019

Bottom: From left to right: Andrew Deane (Donor Development Manager), with Ann Rusden, Roy Rose, Jan Rose, Margaret Mitchell, Joan Garrett, Dr Margaret Garrett, Frank Sims and Jon Michail at Swanson Society Lunch • 2019



From left to right: Paul Wheelton AM KESJ, Angela Wheelton OAM and Dr Sandra Hacker AO (Deputy Chair) at Swanson Society Lunch • 2019

## Inspiring Donors – Pauline and Geoffrey Green

Retired businessman and financial adviser Geoffrey Green OAM RFD ED and his wife Pauline have been supporting Lord Mayor’s Charitable Foundation as both donors and active committee members for over 30 years.

After accepting an invitation to join the Foundation’s Hospital and Charities Sunday Appeal Committee in 1987, Geoffrey was elected to the Board in 1990.

“As a Board member I continued to serve on the Hospital and Charities Committee as it was the main fundraising appeal for the Foundation and very important at the time.”

Pauline believes that a society is only as strong and healthy as its least able member.

“When Geoffrey became involved with the Hospital and Charities Appeal Committee, we had the opportunity to share direct action philanthropy making significant impacts upon people’s lives.”

From 2001 to 2004 Geoffrey says he was honoured to serve as Chair of the Foundation’s Board, finally retiring from the Board in 2006.

“It was during these years that the Foundation was fortunate to receive the generous endowments from Eldon Foote qc. His initial donations and subsequent bequest were pivotal in escalating the Foundation to the substantial corpus that it enjoys today.”

Supporting charitable causes has always been an important part of Geoffrey and Pauline Green’s life.

“From the earliest years of our marriage, Pauline and I have always supported charitable causes. We regard it as a natural duty to share our good fortune with others. After 62 years of marriage we still adhere to this belief.”

Geoffrey was also an active volunteer on the boards of other community organisations and served in the CMF/Army Reserve from 1953 to 1987, retiring with the rank of Lieutenant Colonel.

Geoffrey and Pauline extended their generous support of the Foundation by establishing the Geoffrey and Pauline Green Fund in 2001 and continue to add to it each year.



Geoffrey Green OAM RFD ED (Former Chair) with wife Pauline Green at Inspiring Philanthropy Oration • 2018

“Each year we are able to support important causes and organisations that are important to us through our charitable fund which will grow and continue our contribution to the community in the years to come.”

Pauline says that over the three decades supporting the Foundation they have both witnessed and supported the changing and growing needs of Melbourne.

“With the growth in demand for services and assistance, the work of the Foundation is more important than ever before, and we are very pleased to be part of the Foundation’s work.”

“Our continuing association with the Lord Mayor’s Charitable Foundation is a matter of some pride and satisfaction,” added Geoffrey.

## COLLECTIVE GIVING



From left to right: Lonia Catalano (Donor Services Coordinator), with Ella Talbot and Brian Talbot at Celebrating Giving • 2018

### Charitable Funds Accounts

It is only through the inspirational support of passionate and strategic fundholders that the Foundation can perpetually create positive social change.

Our donors choose to establish a Charitable Fund Account for many reasons, including honouring the memory of a loved one, planning to give through their will, or creating an enduring way to engage family members in giving.

This year, our fundholders were invited to attend many of the Foundation’s functions including the *Inspiring Philanthropy* events in September and November, the annual *Swanson Society Dinner* and our end-of-year ‘thank you’ celebration event. We are grateful for the relationship we have with our donors and their continued support.



Andrew Deane (Donor Development Manager), with Joan Garrett at the Swanson Society Lunch • 2019

### CHARITABLE FUND ACCOUNTS

- A & D Richards Family Fund
- A 2 Z King Family Fund
- Allan Douglas (Doug) McPhee Fund
- Anderson Fund
- Andrew James Lancashire Memorial Fund
- Ann Rusden Fund
- Anne White Fund
- Association of Civilian Widows Vic Fund
- ASW Fund
- Australian Universities Classical Scholarship Fund
- Barbara Leighton Fund
- Barry & Joan Medwin Family Fund
- Berkovic-Fraenkel Family Fund
- Bethany Wake Fund
- Borchardt Fund
- Boyce Family Fund
- Brian & Ella Talbot Family Fund
- Brown Rochford Family Fund
- Bruce & Robyn McQualter Family Fund
- Bruce Niven Fund
- Buchan Family Fund
- Byrne Fund
- Caine Foundation Fund
- Caitlin Darbyshire Fund
- Cameron Family Charitable Fund
- Capodanno Fund
- Caswell Charitable Fund
- Chanelle’s Heaven Cent Blessing Memorial Fund
- Cheryl & David Baer Fund
- Children’s Protection Society Fund
- Chips Charitable Fund
- Chloe Alexandra Rutherford Fund
- Chris Dalwood Scholarship Fund
- Clara Sim Memorial Fund
- Clive L Wright Fund
- Commercial Travellers’ Association Charitable Fund
- Connon Family Fund
- Cusack Family Fund
- D & H Saltzman Family Memorial Fund for Sheryl
- Daryl Leslie Zvi Rosenfield Memorial Fund
- Daryl Manley Fund
- David & Miriam Rich Fund
- D D & S L Johnston Fund
- Di Power Memorial Fund
- Donald & Shirley Lugg Fund
- Doos Family Fund
- Dora & Trevor Nixon Fund
- Dorn Family Fund

Dorothy Jean Ineke Fund
Dr Margaret Rose Garrett Fund
Duckie Charitable Fund
Duncan Family Fund
E Bennett Fund
Easden Family Fund
Education for All Fund
Eldon & Anne Foote Donor Advised Fund
Ellis W Waters Fund
Emanpea Fund
Emerson-Sullivan Fund
Eric Burton Memorial Fund
Evan Spurway Fund
Falkinger Heritage Fund
Family, Friends & Furry Animals Memorial Fund
Freeman Family Fund
Friends of Carolyn Chisholm Society Fund
Friends of Rumbalara Fund
Fund for Buddy
Fund for Rusty
Gary Singer & Geoffrey Smith Fund
Geoffrey & Pauline Green Fund
Geoffrey K Williams Fund
Gerald Friedlander Family Fund
GGG Fund
Giuliano Family Fund
Greg Blizzard Memorial Fund
Gringlas Family Fund
Hansen Little Foundation Fund
Harris Family Fund
Heath Cosgrove Charitable Fund
Heather Bradley Memorial Fund
Helen & Peter Devereux Fund
Henry Buck's Fund
Hermits of El-Shaddai Charitable Fund
Homestead Financial Group Fund
Hope Rutherford Reilly Fund
Hopkins Knight Family Fund
Illingworth Family Fund
In Memory of Servicemen & Women who did not return Fund
Israel Rosenfield Memorial Fund
Izaak Robison Family Fund
J & N E Brown Fund
J F Thompson Charitable Fund
James Cross Memorial Fund
Jan Slaney Fund
Jarrold Alexander Green Memorial Fund
Jenny & Jim Gardiner Fund
Jill Chapman Fund
John D & Dagnija Balmford Fund
Jones Family Fund
Joshua Bendel Fund
Judy (Gelb) Feiglin Memorial Fund
June & Peter Stringer Fund
June O'Brien Whiting Memorial Fund
Kasey-Anne Lymphoma Charitable Fund
Farrow Family Charitable Fund
Kathy & George Deutsch Family Fund

Kaufman Family Charitable Fund
Keith & Alison May Williams Fund
Kevin & Jacqui Clancy Family Fund
Knight Family Fund
Kolganova & Foster Family Fund
L Semmens Fund
Lady Mayoress' Committee Fund
Lawrence & Joan Cohn Fund
Left Hand Fund
Leighton Family Charitable Fund
Lord Mayor's Children's Fitness Fund
Loftus-Hills Fund
Lyn Grigg Family Fund
Lyons Family Fund
M & B Jenkins Fund
M J Trehwella Fund
M Recht Accessories Fund
MacRobertson Girls High School Fund
Malcolm Grant Brown Fund
Margaret Mitchell Fund
Mark Kenneth Thorn Charitable Fund
Marshall Fund
Marshall-Roth Charitable Fund
Masky Beacon Charitable Fund
McGauran Giannini Family Fund
McLean Family Fund
Meg & Frank Sims Fund
Melbourne Women's Fund 2
Melissa Ryan Princess Fund
Melvie Banks AM DSJ Fund
Mercedes-Benz Australia/Pacific Pty Ltd Fund
Michael Martin Fund
Milledge Family Fund
Minyaka Fund
Moffatt Family Fund
Morrison Family Fund
Motet Fund
Nancy & Ian Wood Fund
Nancy & Ian Wood (Gertrude & Jack Barker) Fund
Nancy & Ian Wood (Marjorie & Phillip Wood) Fund
NJN Charitable Fund
Norm & Pat Draper Charitable Fund
North Bridge Fund
O'Bryan Family Charitable Fund
Oldfield Family Fund
Olga Edith Lowe Fund
Oliver Charitable Fund
One Life Sports Foundation Fund
Onemda Fund
OPA! Charitable Fund
Oxford Houses Fund
Pam Baker Fund
Patricia Cosh Fund
Patricia Farrant Fund
Paul & Ruth Permezel Fund
Payne Family Fund
Pepin Family Fund
Peter & Karen Anderson Family Fund
Possibility Australia Fund

Priestley Family Fund
PRL Charitable Fund
Rayment Family Fund
R C & E M Bennett Fund
Red Bird Moments Charitable Fund
Renshaw Fund
Richard & Gwenyth Higgs Fund
Robert Croft Fund
Rory McCaffrey Reconciliation Fund
RSL Fund
Sally Graham Memorial Fund
Sawers & Sherman (K I A 1916) Memorial Fund
SB08 Conference Scholarship Fund
SBMAJ Fund
Senator Tadeusz Kobylanski Fund
Senza Nome Charitable Fund
Shearman Family Fund
Sheen Community Fund
Shirley Day Fund
Shirley K B & David A Secomb Fund
Simon Buckley Memorial Fund
SJD Charitable Fund
Slome-Topol Family Charitable Fund
Smyth Family Fund
Society to Assist Persons of Education Fund
Strathdon Community Perpetual Fund
Supporting Angels Charitable Fund
Sweet Princess Charitable Fund
Swinburne Philanthropy and Social Impact Alumni Sub-Fund (SPSIA)
Tan Family Fund
Tenzing Fund
The Antaeus Charitable Fund
The Guiding Light Fund
The John and Margaret (JOB & MOB) O'Brien Fund
The Red Bowl Fund
The William Angliss (Victoria) Charitable Fund
Tom & Ruth O'Dea Fund
Tom & Zillah Diamond Fund
Tozer Family Fund
Victor & Shell Sykes Family Fund
Vulcan Family Fund
W H Overall Fund
Walmsley Family Fund
Warburton Family Fund
Warin Chiewwej & William Holder Charitable Fund
Weber Jenkin Family Fund
Wendy Hurse Fund
Weston Street United - Masonic Fund
Wexler Family Fund
Wheeldon Philanthropy Fund
White Fang Fund
Wilbow Group Fund
Wilfrid & Joan Minson Fund
William A Lyon Fund
Wootton Family Fund
Zdraveski Charitable Fund 1
Zdraveski Charitable Fund 2
Zdraveski Charitable Fund 3

## Community Charitable Fund Accounts - Community Philanthropy

Community Charitable Fund Accounts continue to make an important contribution through their fundraising and grantmaking within their local communities. As their knowledge and resources grow, so does their capacity to have a powerful impact on issues such as healthy and socially cohesive communities, youth support networks, the environment and food security.

### PATHWAYS INNOVATION FUND (CITY OF MELBOURNE)

VincentCare Victoria	\$4,000
cohealth	\$200,000
VincentCare Victoria	\$189,000

### YARRA CITY COUNCIL ROOM TO CREATE CHARITABLE FUND

West Space	\$1,780
West Space	\$26,739
West Space	\$1,481

### CASEY CARDINIA FOUNDATION CHARITABLE FUND

Guide Dogs Victoria	\$3,000
Casey North Community Information & Support Service	\$7,500
The Trustee for Narre Warren Christian Church Inc Welfare Fund	\$5,000

### FRANKSTON COMMUNITY FUND

Australian Red Cross Society	\$1,000
Kindred Clubhouse	\$5,820
The Trustee For The Salvation Army (Vic) Social Work	\$5,000
Frankston Churches Community Breakfast	\$10,000
Operation Larder	\$5,000
Theodora House	\$4,350
Groomed to Go	\$5,000

### HUME CHARITABLE FUND

Riding for the Disabled Association Of Victoria	\$10,000
Second Chance Animal Rescue	\$10,000
Corpus Christi Community Greenvale	\$5,000
Careworks Sunranges	\$10,000
The Trustee For The Salvation Army (Vic) Social Work	\$10,000

### KINGSTON CHARITABLE FUND

Melbourne Anglican Benevolent Society	\$5,000
Christian Resource Care	\$3,000
Make A Difference Dingley Village	\$10,000
Bayside Community Care	\$2,660
The Food for Change Foundation	\$5,000
Chelsea Community Supprt Service	\$5,000
Springvale Benevolent Society	\$2,000
Bonbeach Life Saving Club	\$5,370
L'chaim Chabad Inc School Building Fund	\$3,000
Bayside Community Information & Support Service	\$8,000
Playgroup Victoria	\$10,500

## Giving Circles

Giving circles provide an opportunity for like-minded, socially aware donors to pool their resources and donations to make a greater impact in their grantmaking. Lord Mayor's Charitable Foundation supports two of Melbourne's leading giving circles, Melbourne Women's Fund and Impact100 Melbourne, and has launched the Hive Collective Giving Groups.



### Melbourne Women's Fund

Since launching five years ago, Melbourne Women's Fund (MWF) has granted over \$575,000 to charities and not-for-profit organisations that support women and children in the community.

Grants from Melbourne Women's Fund have opened doors to new networks and built supportive relationships for many recipient organisations, enabling them to seek new or increased funding from State Government and other philanthropic organisations.

The Foundation congratulates Melbourne Women's Fund on its fifth anniversary and the extraordinary philanthropy of its members.



Founders: Pat Burke and Gillian Hund



### Impact100 Melbourne

Impact100 Melbourne has spent the past twelve months learning more about its 2018-19 grantmaking theme, youth homelessness. Members have heard from Hope Street Youth and Family Services, the *HomeStretch* Campaign and an inspiring presentation on 'How collective giving is helping to grow philanthropy' from Philanthropy Australia CEO Sarah Davies.

Four fantastic finalists were shortlisted with Society Melbourne, SHARC, HoMie and Musicians making a difference (MMAD) vying for the Major Grant on 22 August. New members and volunteers continue to be welcomed to learn more about making life better for all in Melbourne.



Impact100 Melbourne Awards night • 2019



### Hive Collective Giving Groups

Lord Mayor's Charitable Foundation's Hive collective giving groups are a new initiative aimed at growing our impact in the community.

The Foundation wants to share our journey in philanthropy with more people and to match our funding and knowledge with the time, talent and treasure of like-minded colleagues who want to be changemakers with us. The Hive Collective Giving Groups provide an opportunity for current and future donors with a passion for a particular social or environmental issue, to work with the Foundation to increase the impact of their philanthropy collectively. These groups have been established in the areas of Education, Health and Housing, each led by passionate ambassadors who are committed to their respective area.

We are very grateful for the generosity of the following Hive Ambassadors:

**Paul Wheelton AM KSI & Angela Wheelton OAM**  
Education Hive Ambassadors

**A/Prof. Grant Blashki**  
Health Hive Ambassador

**Rob McCauran**  
Housing Hive Ambassador

## INSPIRING PHILANTHROPY PARTNERSHIPS



### Leader Local Grants Partnership

Once again Lord Mayor's Charitable Foundation proudly partnered with Leader Community News to support the Greater Melbourne community through the *Leader's Local Grants* program. Readers of Leader Community News are asked to vote for their favourite local project to receive a \$1,000 grant from Leader Newspapers. The program aims to encourage community philanthropy and support local people working together to improve the health and wellbeing of their local communities.



One of the winners of the Leader Local Grants • 2019

### Changing Melbourne for Good

Now in its third year, the *Changing Melbourne for Good* campaign has continued to evolve and resonate with the broader community by sharing the Foundation's vision, mission and that for over 95 years together we have been changing Melbourne and the lives of Melburnians for the better.

“  
**Change. A powerful word that moves us, unites us, and defines us. It inspires us to take on the challenges of today and set them on a new path, the right path for tomorrow.**  
”



### Vital Conversations Podcast

Lord Mayor's Charitable Foundation recently produced its first podcast titled 'Vital Conversations.' As a direct response to our *Vital Signs* reports, our new Vital Conversations podcast series aims to shed light on the biggest challenges facing Greater Melbourne by inviting inspiring changemakers and researchers to discuss and debate issues with CEO, Dr Catherine Brown. You can listen to the Vital Conversations podcast by visiting: [lmcf.org.au/podcast](http://lmcf.org.au/podcast)



## FINANCE & INVESTMENT REPORT

### Lord Mayor's Charitable Foundation Consolidated Group

The Financial Report on the following pages is an extract of the consolidated annual audited financial reports of the Lord Mayor's Charitable Foundation, Lord Mayor's Charitable Fund (the Public Ancillary Fund) and The Eldon and Anne Foote Trust. The Public Ancillary Fund includes approximately 200 charitable fund accounts including named bequests.

#### Income

Total income from continuing operations represents corpus revenue, general revenue and unrealised gains/(losses) on investments of \$20.682m (2018: \$25.601m). Corpus revenue of \$15.583m (2018: \$21.258m), reduced by \$5.675m as the prior year included material realised gains of over \$10.395m on the sale of investments. Due to favourable market conditions, there were unrealised gains at 30 June 2019 of \$3.525m, compared with unrealised gains at 30 June 2018 of \$1.772m, a \$1.753m increase.

General revenue includes \$1.502m of donations into giving accounts (2018: \$2.408m). The prior year included a single \$1.0m donation from a new donor to a giving account, which was utilised for grants across the Impact Areas of Homelessness & Affordable Housing, and Healthy & Resilient Communities. Giving account revenue flows directly through to the grants program. Giving accounts may be established by charitable fund account donors.

#### Expenses

Total expenses of \$4.506m (2018: \$4.363m) increased by \$143k. The Foundation allocated resources to delivering the Foundation's Granting Programs and Community Initiatives (Affordable Housing Challenge, Energy Efficiency, Food Security, Future Jobs, Hot Spots, and Vital Signs). The Youth in Philanthropy Program continued to have full participation, with resources allocated to the program's twenty secondary schools across metropolitan Melbourne. The Foundation also continued to allocate resources to marketing and developing its philanthropic products and services and encouraged more people to be involved in community philanthropy. The Foundation continued to invest in valuable data analytic and research tools to enhance the quality of its granting and demonstrate impact.

#### Grants

Grants and Initiatives are reported by Impact Area in the annual report, being: Education & Employment; Environment & Sustainability; Healthy & Resilient Communities; and Homelessness & Affordable Housing. Total grants approved during the year were a record \$11.540m (2018: \$10.404m), a \$1.136m/11% increase.

The Foundation adopted a new spending methodology to guide the level of annual grant distributions. The spending methodology will assist in preserving the real purchasing power of grant distributions, and smooth out the level of grant distributions for current and future beneficiaries. The Foundation continues to develop long term strategic grants and has contingent granting liabilities for future financial periods of \$2.649m (2018: \$2.418m). The Foundation supports both responsive and proactive granting programs.



Image:  
Hireup – one of the  
Lord Mayor's Charitable  
Foundation's impact  
investments.

**Equity**

The LMCF Consolidated Group's total equity of \$255.207m has increased by \$4.637m from last year (2018: \$250.570m). The increase is attributed to the increase in unrealised gains on other financial assets as at 30 June 2019. Total equity includes \$5.582m in surplus reserves (2018: \$5.263m) to enable the Foundation to reduce risk to the granting program funding while allowing for changing market conditions, planning for signature grants and responding to disaster relief.

The Foundation's total equity comprises three charitable funds: Lord Mayor's Charitable Foundation; Lord Mayor's Charitable Fund; and The Eldon and Anne Foote Trust.

**Investment Governance**

The Lord Mayor's Charitable Foundation Board and Investment Committee continued to spend significant time developing the investment approach this year. The Foundation maintains a self-managed investment model to outsourced investment managers with expert external investment managers for various asset classes. All managers are rated and monitored by Frontier Advisors on the basis of both their commercial and Environmental, Social and Governance (ESG) capability and appointed through the Foundation's investment custodian, Northern Trust.

The Foundation, in consultation with Frontier Advisors, implemented investment philosophies and spending policies during the year which it had researched previously on global investment philosophies and spending policies of similar organisations including large Foundations and Endowment Funds in the U.S. and U.K.

The spending policies assist the Foundation in determining projected future expense levels and grant distributions based on a certain investment corpus size in varying market conditions. The Foundation's spending policy and methodology is designed to help preserve the real purchasing power of grant distributions, and smooth out the level of grant distributions for current and future beneficiaries. The Foundation's spending policy is an important tool within the overall investment risk framework and will reduce granting volatility over periods of time, whilst also taking into account the objective that the overall investment corpus is growing in real terms relative to inflation.

The Investment Committee and Board have determined an investment risk framework to further develop the investment philosophy of the Foundation. The risk appetite and risk budget

address the challenges of maximising returns, maintaining corpus assets and growing grant distributions along with carrying the acceptable level of investment risk for the Foundation. Following a detailed investment risk review, the Foundation adjusted its strategic investment risk approach several years ago to better reflect its risk budget and the need to maximise returns within a controlled risk framework. The risk appetite and investment risk profile determined in this review was applied during the year.

The Board has established a risk appetite by defining certain risk metrics which are monitored by the Investment Committee in consultation with its advisors. The risk metrics are:

1. Return target – at least CPI +2.5% p.a. measured over rolling 10 years;
2. Volatility of Distributions – expected worst case annual distribution volatility of 15%;
3. Drawdowns – expected worst case drawdown (loss) over 3 years of 25% of the corpus value.

The Strategic Asset Allocation (SAA) is developed to meet all three objectives. The investment strategy will continue to improve the Foundation's ability to fund grants in the short term and provides certainty to the Board around the Foundation's ability to provide large, multi-year strategic grants.

**Strategic Asset Allocation**

The Foundation, as the trustee of perpetual charitable funds, adopts a long-term investment view. A balanced approach is required to continue growing the consolidated investment corpus and level of distributable income available to provide grants to charities.

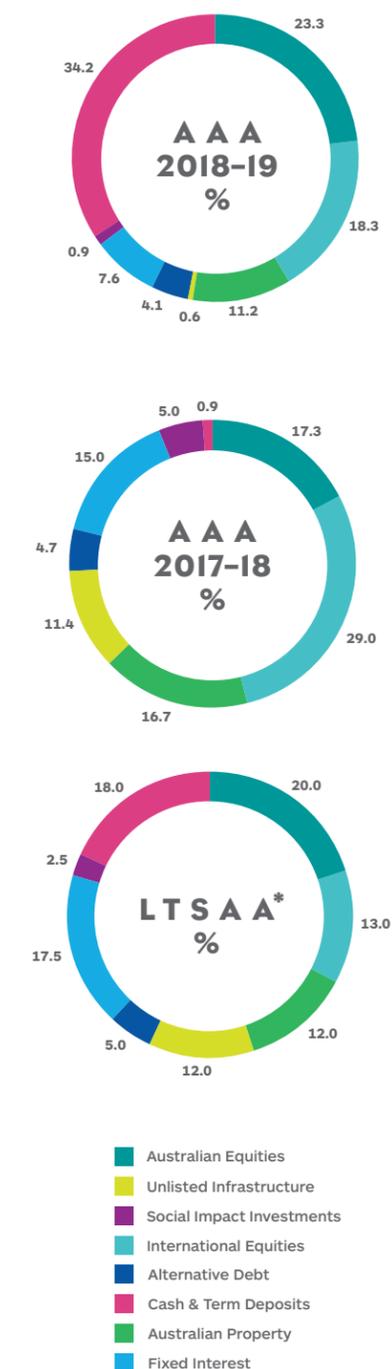
The Foundation receives strategic investment advice from Frontier Advisors including input into the recommended strategic asset allocation. The SAA is reviewed every year.

The Foundation continued to adopt a dynamic asset allocation away from the SAA during the year to determine ideal weights to various asset classes in its outsourced investment model, taking into account current market pricing and expected returns. The asset classes comprise both growth assets and defensive assets.

Approved Asset allocation ranges are modelled and reviewed monthly by the Investment Committee.

**The Actual Asset Allocations (AAA) as at 30 June 2019 were:**

**ASSET ALLOCATION 30 JUNE 2019**



\*LTSA A - Long-term Strategic Asset Allocation

ASSET CLASS	FUND MANAGER	% of TOTAL PORTFOLIO 30/6/19	LTSAA*
Australian Equities	Solaris Investment Management	23%	20%
	Yarra Capital Management		
International Equities	Northern Trust Global Asset Management	18%	13%
Australian Property	AMP Capital	11%	12%
Unlisted Infrastructure	Colonial First State	1%	12%
Alternative Debt	IFM Investors Pty Ltd	4%	5%
	Metrics Credit Partners		
Cash & Term Deposits	Secure Investments FIB Pty Ltd	34%	18%
Fixed Interest	BlackRock	8%	17.5%
Social Impact Investments	n/a	1%	2.5%
<b>TOTAL</b>		<b>100%</b>	<b>100%</b>

**Investment Performance**

The last twelve months saw continued volatility in global and domestic markets. Global economic growth began the year strongly, but declined during the course of the year as trade tensions and political uncertainty in multiple jurisdictions acted as a drag on global trade, manufacturing activity, and business investment. During the first half financial market performance was impacted by rising interest rates in the US and a deterioration in trade relations between the US and China, the world's two largest economies. The reduction in exposure to risk assets which was effected over the last several years minimised the impact on the portfolio during this period. Around the turn of the calendar year central banks became more dovish. This supported financial markets notwithstanding the deterioration of conditions in the real economy. During the second half the portfolio benefited from its diversifying exposure to fixed interest and foreign currency as the Australian Dollar fell against most counterparts.

Overall, the investment performance was solid, particularly given the reduction in the risk profile of the fund, which illustrated the benefits of diversification and building a resilient portfolio in uncertain markets. The Foundation maintained higher cash levels as it awaited being called on Infrastructure commitments during the year.

The 2018/2019 annual total return after manager fees, was 6.3% which exceeded the LMCF investment objective. The greater level of diversification introduced to the portfolio over the past year assisted in ensuring returns were spread across all sectors. The Foundation adopts a total return view of performance rather than income versus capital returns.

The Foundation considers that its mission is long-term in nature and that it is most appropriate to consider the long-term returns generated by the investment program. In this context, the 5-year return of 6.8% pa is a sound result and reflects the disciplined approach of building the portfolio with a mix of growth and defensive assets.

Total return figures are as follows:

**Performance Summary  
Year ended 30 June 2019**

**NET PERFORMANCE AFTER FEES**

	5 years % pa	3 years % pa	FY 19 % pa
<b>TOTAL RETURN</b>	<b>6.8%</b>	<b>7.9%</b>	<b>6.3%</b>

Looking forward, the Investment Committee will continue to monitor the portfolio closely and expects the low earnings environment and volatile financial performance in markets to continue. In this environment, the Foundation’s approach to investment risk of maintaining diversification and taking moderate risk is appropriate.

**Investment Policy**

The Foundation maintains an Investment Policy which includes the investment strategy, a Impact Investment Policy and a Responsible Investment Policy.

The Foundation reviews its Investment Policy annually as a part of its Investment Governance Framework Review. It also regularly reviews the Foundation’s Risk Appetite in all areas of the Foundation’s business. The Foundation continues to keenly explore impact investment opportunities that provide a measurable social impact and sound financial returns.

The Foundation has maintained a Responsible Investment Policy for a considerable time. The Foundation further developed its approach to (ESG), and Responsible Investing during the year and will continue to do so during 2019/20. The Foundation believes in strategic alignment of its organisational beliefs and mission with investment strategy and portfolio construction. It also believes a long-term Investment strategy which considers social and environmental impacts is likely to experience less portfolio volatility and more sustainable investment performance over time.



**Darren McConnell**  
Chief Financial & Operations Officer



**Dr Raphael Arndt**  
Chair, Investment Committee



From left to right: Jaishma Krishna (Finance Officer), Tara Navaratnam (Finance Officer), and Dianne Street (Finance Manager) at Inspiring Philanthropy Celebration • 2018

**INVESTMENT ADVISORS**

**Strategic Investment Allocation Advisors**  
Frontier Advisors

**Investment Custodian**  
Northern Trust

**Fixed Interest Broker**  
Secure Investments FIB Pty Ltd

**Independent Investment Committee Members:**  
Ms Jane Simon  
Mr Trevor Williams

**PROFESSIONAL ADVISORS**

**External Auditors**  
Deloitte Touche Tohmatsu

**Internal Auditors**  
Oakton

**Accounting and Audit**  
RSM Australia

**Banking**  
Westpac Banking Corporation

**Legal**  
Gadens Lawyers  
(including some pro bono advice)

Justitia Lawyers

**MEMBERS OF THE BOARD REPORT**  
**For the Financial Year Ended 30 June 2019**

The members of the Lord Mayor’s Charitable Foundation (The Foundation) present their report, together with the financial statements, on the Lord Mayor’s Charitable Foundation Consolidated Group (the “LMCF Consolidated Group”) for the financial year ended 30 June 2019.

The LMCF Consolidated Group financial report represents the combined annual financial results of the following individual entities:

- Lord Mayor’s Charitable Foundation  
– ABN 48 042 414 556
- Lord Mayor’s Charitable Fund  
– ABN 63 635 798 473
- The Eldon and Anne Foote Trust  
– ABN 38 330 915 392

The Foundation, a charitable institution, acts as trustee of the Lord Mayor’s Charitable Fund (a public ancillary fund) and The Eldon and Anne Foote Trust, a charitable trust and holds charitable funds. The LMCF Consolidated Group financial report is a “special purpose financial report” which combines the annual audited financial reports of the above-named entities. The LMCF Consolidated Group Financial Report does not form a separate economic entity for accounting purposes.

**Members of the Board**

The following persons were members of the Board of the Trustee during the whole of the financial year and up to the date of this report, unless otherwise stated:

**Mr Andrew Baxter**  
*Chair*

**Dr Sandra Hacker ao**  
*Deputy Chair*

**Dr Raphael Arndt**

**Mr Craig Bell**

**Ms Jane Hansen**

**Mr Robert McGauran**

**Ms Gail Owen oam**

**Mr Paul Bird**  
*Appointed October 2018*

**Mr Angus Graham oam**  
*Appointed October 2018*

**Mr Daniel Leighton**  
*Term expired October 2018*

**Ms K. Jane Peck**  
*Resigned September 2018*

**Principal activities and any significant changes to those activities during the year**

The LMCF Consolidated Group is a combination of three not-for-profit entities being the Lord Mayor’s Charitable Foundation, the Lord Mayor’s Charitable Fund and The Eldon and Anne Foote Trust.

The Lord Mayor’s Charitable Fund is a not-for-profit entity established under an Act of Parliament – Lord Mayor’s Charitable Foundation Act 2017 (Vic) (the LMCF Act 2017).

The principal activities of the individual entities which make up the LMCF Consolidated Group comprise:

- providing grants to charitable organisations to increase life opportunities and improve social inclusion including in the areas of homelessness and affordable housing, education and employment, healthy and resilient communities and environment and sustainability;
- providing opportunities and support for individuals and families to participate in philanthropy through donations, sponsorship, charitable fund accounts and bequests;
- researching and stimulating awareness of relevant community needs and of philanthropy; and
- the Lord Mayor’s Charitable Foundation also acts as a trustee of charitable funds, Lord Mayor’s Charitable Fund and the Eldon and Anne Foote Trust.

# MEMBERS OF THE BOARD REPORT

For the Financial Year Ended 30 June 2019

Continued

The LMCF Consolidated Group includes charitable fund accounts and bequest funds within a Public Ancillary Fund. It also includes other charitable funds and The Eldon and Anne Foote Trust. Investment income attributed to charitable fund balances is made available for charitable distribution after taking into consideration the requirements of the Federal Treasury Public Ancillary Fund Guidelines (2011), capital preservation requirements and stipulated management fees.

There were no significant changes to the principal activities during the year.

### Review of operations and results

Total consolidated income from operations was \$20,682,220 (2018: \$25,601,292). The decrease in comparison to the prior year is due to a decrease in corpus bequest revenue and realised gains on investments. After the payment of expenses there was a distributable surplus before grants approved of \$16,176,400 (2018: \$21,238,781) a decrease from the prior year. The current year income surplus together with accumulated income funds was applied to charitable grant distributions of \$11,539,599 (2018: \$10,403,883), an 11% increase in comparison to the prior year.

### Significant changes to the state of affairs

There were no significant changes to the state of affairs of the entities within the LMCF Consolidated Group during the financial year.

### Subsequent events

Since the end of the financial year, there were no subsequent events affecting the operations, results of operations or the state of affairs of the individual entities within the LMCF Consolidated Group.

### Likely developments

There are no likely developments to impact the financial results of the entities within the LMCF Consolidated Group during the financial year ending 30 June 2020.

### Environmental Regulations

The entities within the LMCF Consolidated Group are not subject to any significant environmental laws or regulations.

### Indemnification of Members of the Board

Directors and Officers insurance is held by the Foundation on behalf of all entities within the LMCF Consolidated Group.

### Board and Board Committee meetings

The following table sets out the number of Board meetings during the financial year and the number of meetings attended by each member. During the financial year ended 30 June 2019, there were: nine Board meetings, six Investment Committee meetings, one Governance Committee meeting, one Audit and Risk Committee meeting, four Governance, Audit and Risk Committee meetings (formed by merging Governance Committee and Audit & Risk Committee), three Strategic Marketing Committee meetings and three Nominations Committee meetings.

# MEMBERS OF THE BOARD REPORT

For the Financial Year Ended 30 June 2019

Continued

	Board Meeting & Annual Meeting		Investment Committee		Governance Committee		Audit & Risk Committee		Governance, Audit & Risk Committee		Strategic Marketing Committee		Nominations Committee <sup>1</sup>	
	Eligible to attend	Attended	Eligible to attend	Attended	Eligible to attend	Attended	Eligible to attend	Attended	Eligible to attend	Attended	Eligible to attend	Attended	Eligible to attend	Attended
Mr Andrew Baxter (Chair)	9	9	-	-	1	1	-	-	-	-	3	3	3	3
Dr Sandra Hacker AO (Deputy Chair)	9	9	-	-	1	1	-	-	4	4	-	-	-	-
Dr Raphael Arndt	9	7	6	6	-	-	-	-	-	-	-	-	-	-
Mr Craig Bell	9	8	-	-	-	-	1	1	4	4	-	-	3	3
Ms Jane Hansen	9	8	1	1	-	-	-	-	-	-	3	2	-	-
Mr Robert McGauran	9	8	-	-	-	-	-	-	-	-	3	3	-	-
Ms Gail Owen OAM	9	8	-	-	1	1	1	1	4	4	-	-	-	-
Mr Paul Bird (Appointed October 2018)	6	6	5	4	-	-	-	-	-	-	-	-	-	-
Mr Angus Graham OAM (Appointed October 2018)	6	5	5	3	-	-	-	-	-	-	-	-	-	-
Mr Daniel Leighton (Term expired October 2018)	4	3	1	-	-	-	-	-	-	-	1	1	-	-
Ms K. Jane Peck (Resigned September 2018)	1	1	-	-	-	-	-	-	-	-	1	1	-	-

<sup>1</sup> The Nominations Committee comprises the Lord Mayor (Chair), two LMCF Board members and two external members.

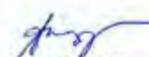
### Governance procedures

The Governance procedures of the Board include the following elements:

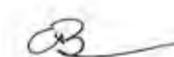
- Board meetings were held at least every three months (s.18 of the Lord Mayor's Charitable Foundation Act 2017) and the Board met nine times during the financial year;
- The Board has established the following Committees to assist in the good governance of the Board: Governance, Audit and Risk Committee, Strategic Marketing Committee, Investment Committee and the Nominations Committee (s13 Lord Mayor's Charitable Foundation Act 2017 (Vic));
- Following the completion of the LMCF Act amendment process, the Governance Committee was combined with Audit and Risk Committee to become the Governance, Audit and Risk Committee (GAR). The first GAR meeting was in November 2018;
- Grants Advisory Panels continued to provide advice on the responsive grant making program;
- The Board reviewed its Code of Conduct;
- The Investment Committee continued to engage Frontier Advisors as external strategic asset allocation advisors who were present at all meetings. The Investment Committee received advice from expert advisors in various asset classes.

The Investment Committee adopted a dynamic term and long-term strategic asset allocation within its Investment Policy. The Investment Policy includes a Responsible Investment Policy. The strategic asset allocation and Investment Policy were reviewed during the year. The Responsible Investment and Impact Investment Policies were also reviewed;

- Two new Board members were inducted during the financial year;
- The Board undertook an annual performance and effectiveness review, led by an external consultant;
- The Risk Appetite policy was reviewed;
- The Risk Register and the Legal and Compliance Register were updated by management and reviewed twice by the Governance, Audit and Risk Committee and the Board;
- An internal audit program is in place and two reviews have been undertaken during the financial year;
- An annual report including summary audited financial statements and an activity report was produced and presented at the Annual Meeting and made available to the public.

  
Andrew Baxter  
Chair of the Board

Date: 26 September 2019  
Melbourne

  
Craig Bell  
Chair of the Governance, Audit and Risk Committee

Date: 24 September 2019  
Melbourne

# Lord Mayor's Charitable Foundation Consolidated Group STATEMENT OF PROFIT OR LOSS AND OTHER COMPREHENSIVE INCOME

For the Financial Year Ended 30 June 2019

	2019 \$	2018 \$
<b>INCOME FROM CONTINUING OPERATIONS</b>		
General revenue	1,574,189	2,571,234
Corpus revenue	15,583,355	21,258,292
Unrealised gain on other financial assets	3,524,676	1,771,766
<b>Total income from continuing operations</b>	<b>20,682,220</b>	<b>25,601,292</b>
<b>EXPENSES FROM CONTINUING OPERATIONS</b>		
Employee Benefits	(2,631,318)	(2,530,306)
Marketing and development expenses	(423,141)	(516,783)
Depreciation and amortisation	(134,377)	(122,663)
Other operating expenses	(1,316,984)	(1,192,759)
<b>Total expenses from continuing operations</b>	<b>(4,505,820)</b>	<b>(4,362,511)</b>
<b>SURPLUS FOR THE FINANCIAL YEAR</b>	<b>16,176,400</b>	<b>21,238,781</b>
<b>SURPLUS FOR THE FINANCIAL YEAR BEFORE GRANTS APPROVED</b>	<b>16,176,400</b>	<b>21,238,781</b>
<b>GRANTS APPROVED</b>		
Grants approved	(11,539,599)	(10,403,883)
<b>SURPLUS AFTER GRANTS APPROVED</b>	<b>4,636,801</b>	<b>10,834,898</b>
<b>OTHER COMPREHENSIVE INCOME</b>		
	-	-
<b>TOTAL COMPREHENSIVE INCOME FOR THE FINANCIAL YEAR</b>	<b>4,636,801</b>	<b>10,834,898</b>

# Lord Mayor's Charitable Foundation Consolidated Group STATEMENT OF FINANCIAL POSITION

As at 30 June 2019

	2019 \$	2018 \$
<b>ASSETS</b>		
<b>Current assets</b>		
Cash and cash equivalents	5,677,922	10,400,736
Receivables	3,515,698	4,048,012
<b>Total current assets</b>	<b>9,193,620</b>	<b>14,448,748</b>
<b>Non-current assets</b>		
Other financial assets	251,236,971	241,369,828
Loans and advances	1,900,000	1,900,000
Plant and equipment	61,508	36,063
Other intangible assets	145,102	257,370
<b>Total non-current assets</b>	<b>253,343,581</b>	<b>243,563,261</b>
<b>Total assets</b>	<b>262,537,201</b>	<b>258,012,009</b>
<b>LIABILITIES</b>		
<b>Current liabilities</b>		
Payables	537,726	825,676
Grants authorised for distribution	6,482,636	6,356,242
Employee benefits	190,567	154,896
<b>Total current liabilities</b>	<b>7,210,929</b>	<b>7,336,814</b>
<b>Non-Current liabilities</b>		
Employee benefits	119,325	105,049
<b>Total non-current liabilities</b>	<b>119,325</b>	<b>105,049</b>
<b>Total liabilities</b>	<b>7,330,254</b>	<b>7,441,863</b>
<b>Net assets</b>	<b>255,206,947</b>	<b>250,570,146</b>
<b>EQUITY</b>		
Corpus & general bequest funds	249,624,610	245,307,203
Funds to be distributed	5,582,337	5,262,943
<b>Total equity</b>	<b>255,206,947</b>	<b>250,570,146</b>

# Lord Mayor's Charitable Foundation Consolidated Group DECLARATION BY MEMBERS OF THE BOARD

For the Financial Year Ended 30 June 2019

In the opinion of the members of the Board the statement of profit or loss and other comprehensive income, statement of financial position, statement of changes in equity, statement of cash flows and notes to and forming part of the financial statements, are in accordance with the Australian Charities and Not-for-Profits Commissions Act 2012 and presents fairly the results of the LMCF Consolidated Group's operations for the year ended 30 June 2019 and its state of affairs as at that date.

At the date of signing this financial report, we are not aware of any circumstance that would render any particulars included in the financial report to be misleading or inaccurate. There are reasonable grounds to believe that the LMCF Consolidated Group will be able to pay its debts as and when they became due and payable.

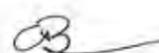
This declaration is made in accordance with a resolution of the members of the Board of the Lord Mayor's Charitable Foundation pursuant to s.60.15 of the Australian Charities and Not-for-Profits Commissions Regulations 2013.

The members of the Board declare that:

- a) In the opinion of the members of the Board, there are reasonable grounds to believe that the LMCF Consolidated Group will be able to pay its debts as and when they become due and payable;
- b) In the opinion of the members of the Board, the attached financial statements and notes thereto are in accordance with the Australian Charities and Not-for-Profits Commissions Act 2012, including compliance with accounting standards and give a true and fair view of the financial positions and performance of the entity and the consolidated group.

Signed in accordance with a resolution of the directors made pursuant to s.60.15 of the Australian Charities and Not-for-Profits Commissions Regulations 2013.

  
Andrew Baxter  
Chair of the Board

  
Craig Bell  
Chair of the Governance, Audit and Risk Committee

Date: 26 September 2019  
Melbourne

Date: 27 September 2019  
Melbourne

# AUDITOR'S INDEPENDENCE DECLARATION

**Deloitte.**

Deloitte Touche Tohmatsu  
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26 September 2019

Members of the Board  
Lord Mayor's Charitable Foundation Group  
Level 15, 1 Collins Street  
MELBOURNE VIC 3000

Dear Board Members

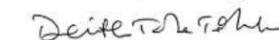
**Lord Mayor's Charitable Foundation Consolidated Group**

In accordance with Subdivision 60-C of the *Australian Charities and Not-for-Profits Commission Act 2012*, I am pleased to provide the following declaration of independence to the members of Lord Mayor's Charitable Foundation.

As lead audit partner for the audit of the financial statements of Lord Mayor's Charitable Foundation Consolidated Group for the financial year ended 30 June 2019, I declare that to the best of my knowledge and belief, there have been no contraventions of:

- (i) the auditor independence requirements of the *Australian Charities and Not-for-Profits Commission Act 2012* in relation to the audit; and
- (ii) any applicable code of professional conduct in relation to the audit.

Yours faithfully



DELOITTE TOUCHE TOHMATSU



Peter A. Caldwell  
Partner  
Chartered Accountants

Liability limited by a scheme approved under Professional Standards Legislation  
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# INDEPENDENT AUDITOR'S REPORT

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## Report of the Independent Auditor on the Summary Financial Statements to the members of Lord Mayor's Charitable Foundation Consolidated Group

### Opinion

The summary financial statements, which comprise the extract statement of financial position as at 30 June 2019 and the extract statement of profit and loss for the year then ended, are derived from the audited financial report of the Lord Mayor's Charitable Foundation Consolidated Group for the year ended 30 June 2019.

In our opinion, the accompanying statements are consistent, in all material respects, with the audited financial report.

### Summary Financial Statements

The summary financial statements do not contain all the disclosures required by the Australian Accounting Standards. Reading the summary financial statements and the auditor's report thereon, therefore, is not a substitute for reading the audited financial report and the auditor's report thereon. The summary financial statements and the audited financial report do not reflect the effects of events that occurred subsequent to the date of our report on the audited financial report.

### The Audited Financial Report and Our Report Thereon

We expressed an unmodified audit opinion on the audited financial report in our report dated 26 September 2019.

### Responsibilities of the Directors for the Summary Financial Statements

The Directors are responsible for the preparation of the summary financial statements.

### Auditor's Responsibility

Our responsibility is to express an opinion on whether the summary financial statements are consistent, in all material respects, with the audited financial report based on our procedures, which were conducted in accordance with Auditing Standard ASA 810 *Engagements to Report on Summary Financial Statements*.

DELOITTE TOUCHE TOHMATSU

Peter A Caldwell  
 Partner  
 Chartered Accountants  
 Melbourne, 26 September 2019

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# BOARD MEMBER PROFILES AS OF JUNE 2019



**Andrew Baxter**  
 BBUS(MKTG), FAMI CPM, FAICD

**Appointed:** 2011

**Board Chair:** October 2016 - present

**Committee:** Strategic Marketing (Chair)

**Grants Advisory Panel:**  
 Education & Employment (Co-Chair)

Andrew Baxter is the Senior Advisor at KPMG's entrepreneurial Customer, Brand & Marketing Advisory business, a Senior Advisor at BGH Capital, as well as the Adjunct Professor of Marketing at the University of Sydney. He is also Chair of Tjapukai and a Non-Executive Director at Australian Pork and Sydney Symphony Orchestra. Prior to this he was the Chief Executive Officer of two of the country's largest communications agencies, Publicis, and Ogilvy, where he was a trusted counsel to many of Australia's most iconic brands.

Andrew has also held a number of significant Board and Chair roles at Deakin Business School, The Song Room, Melbourne Aces, Catch Group, NBL and the Communications Council.

Andrew regularly writes and speaks about the future of marketing, in a world where both consumers and technology are ever-evolving. He has been named as one of LinkedIn's Top 40 Australian influencers, and the winner of Australian Marketing Institute's Sir Charles McGrath Award for his significant contribution to the field of marketing.

Andrew is a Fellow of the Australian Marketing Institute, a Fellow of the Australian Institute of Company Directors, and holds a Bachelor of Business (Marketing) from Monash University.



**Dr Sandra Hacker AO**

**Appointed:** 2014

**Deputy Chair:** October 2017 - present

**Committees:** Governance, Audit & Risk

**Grants Advisory Panel:**  
 Healthy & Resilient Communities (Chair)

Sandra is a psychiatrist in private practice and honorary consultant psychiatrist at the Alfred Hospital. She is an Officer of the Order of Australia (AO), holds a Doctor of Medical Science (Honoris Causa) from the University of Melbourne and is a Fellow of the Australian Institute of Company Directors.

Sandra chairs the Human Research Ethics Committee of the Victorian Department of Health and Human Services.

Sandra is a former President of the Australian Medical Association Victoria, and Vice-President of the Federal AMA.

Sandra is a board member of Entertainment Assist and has chaired the Boards of the Australian Institute of Health and Welfare, the Mental Health Research Institute and Northern Health. She has also chaired the Australian Health Ethics Committee of the National Health and Medical Research Council.

Sandra was the inaugural psychiatrist of the Alfred Hospital Heart-Lung Transplant Unit. Her private practice area of expertise is post-traumatic stress disorder, and her extensive medico-legal practice includes expert witness work related to sexual abuse, crimes compensation, professional misconduct and medical negligence.



**Dr Raphael Arndt**

**Appointed:** 2016

**Committee:** Investment (Chair)

Raphael was appointed as the Chief Investment Officer of the Future Fund in 2014. He leads a multi-disciplinary investment team making investments across all asset classes and geographies. Prior to this, Raphael was the Fund's Head of Infrastructure and Timberland.

Raphael was previously an Investment Director with Hastings Funds Management. He has also held infrastructure policy positions with both the private sector and the Victorian Department of Treasury and Finance. Raphael started his career as an engineer working with Ove Arup & Partners in Melbourne and London. He holds engineering and commerce degrees and a PhD from the University of Melbourne which focused on risk allocation in Public Private Partnerships.



**Craig Bell**  
BCOM FCPA GAICD

**Appointed:** 2014

**Committees:** Governance, Audit & Risk (Chair)

**Grants Advisory Panel:** Environment & Sustainability (Chair)

Craig is the Chief Executive Officer for Foresters Financial, one of Australia's largest member-owned friendly societies. He is also an Executive Member of the industry body, Friendly Societies of Australia. Prior to this, Craig was the Chief Financial Officer at the Victorian Chamber of Commerce & Industry. He has over 28 years of experience in Finance and ICT, having held senior positions across a number of sectors; including roles in top tier investment firms in London at Lloyds Bank TSB, Salomon Smith Barney and J.P. Morgan, and in Melbourne at ANZ, Legg Mason and Chimaera Capital. He has also held various financial roles in the Victorian and South Australian State Governments.

He is a Fellow of CPA Australia and a Graduate of the Australian Institute of Company Directors and holds a Bachelor of Commerce degree.



**Paul Bird**

**Appointed:** 2018

**Committee:** Investment

Paul returned to Melbourne, his birthplace, 25 years ago after qualifying as a chartered accountant in the UK and then managing KPMG's practice in Gambia and francophone West Africa, before working for the Lutheran World Federation in Bosnia and Croatia during the conflict, followed by an earthquake rehabilitation program in northern Philippines.

Leadership roles in Melbourne include the Brotherhood of St Laurence, Australian Red Cross Blood Service, Very Special Kids, The Body Shop, Mission Australia, World Vision and YSAS, before joining Australian Volunteers International (AVI) in 2015. Over this time, Paul has developed enduring and innovative collaborations between business, governments, NGOs and communities including six social enterprises in Melbourne.

Paul has extensive experience with not-for-profit boards and committees, including currently as Chair of the International Forum for Volunteering for Development.



**Angus Graham OAM**

**Appointed:** 2018

**Committee:** Investment

Angus is currently the Chief Executive Officer at DMP Asset Management, a specialist funds management firm of some 28 years based in Melbourne. Prior to joining DMP, Angus held several Senior Executive positions at ANZ Banking Group including Head of Money Markets within the Global Markets division.

Angus is currently the Chairman of Down Syndrome Australia. He is a Scholarship Trustee of the Mary-Jane Lewis Scholarship Trust & Trustee/Director of the Lauriston Foundation. He previously held Directorships at the Melbourne Football Club, Leukaemia Foundation of Australia, Responsible Investment Association of Australasia, and the Australian Federation of Disability Organisations (AFDO). In 2015, Angus was appointed to the Advisory Committee (Intellectual Disability) of the National Disability Insurance Scheme.

In 2014 Angus received an Order of Australia for service to the Community & the Banking & Finance sector.



**Jane Hansen**

**Appointed:** 2017

**Committee:** Investment

Jane Hansen is an active director in the not-for-profit sector, with more than 25 years investment banking and management experience in London, New York and Australia.

Currently Chair and CEO of the Hansen Little Foundation and all associated philanthropic initiatives, Jane was formerly a mergers and acquisitions and corporate finance specialist at First Boston/Credit Suisse and Macquarie Bank.

Jane joined the board of the Melbourne Theatre Company in February 2015 and is also the inaugural Chair of the theatre company's foundation. She is the Deputy Chancellor and a Member of the Council of the University of Melbourne, and sits on the Melbourne University Humanities Foundation and is Deputy Chair of the Believe Campaign.

Jane also sits on the board of Opera Australia and the Lord Mayor's Charitable Foundation. Previous directorships include the MCG Trust, the State Sport Centres Trust, the federal body of Athletics Australia and the Foundation of the State Library of Victoria.

Jane is a Fellow of the University of Melbourne, holds a bachelor's degree in economics from Monash University, a master's degree in finance and business administration from Columbia University in New York, and is currently in the final year of an arts degree at Melbourne University, majoring in history.



**Robert McCauran**  
PIA, Registered Architect

**Appointed:** 2017

**Committee:** Strategic Marketing

**Grants Advisory Panel:** Homelessness & Affordable Housing (Chair)

A founding Director of MGS Architects, Rob's particular areas of interest are around the themes of knowledge cities, inclusive cities, sustainable cities and connected cities and the buildings and programs that support these themes. This is drawn from both the particular and distinctive attributes of and challenges facing Australian cities.

His relevant skills are in master planning, design of mixed-use, inclusive community activity nodes, affordable housing, sustainable transport infrastructure and sustainable architecture.

He is an experienced advocate, managing community consultation and government partnership processes. His master planning projects involve the design management of large and complex multi-disciplinary consultant teams and stakeholder groups.

At a strategic planning level Rob has been responsible for urban design frameworks and structure plans for key areas of Melbourne.

In the not-for-profit sector, Rob has been a board member of Housing Choices Australia and Melbourne Affordable Housing and a Future Ambassador for Melbourne 2026.



**Gail Owen OAM**  
FAICD

**Appointed:** 2015

**Committees:** Governance, Audit & Risk

**Grants Advisory Panel:** Education & Employment (Co-Chair)

Gail is a commercial lawyer, with particular expertise in energy and resources, of nearly 40 years standing. She is currently a partner of HWL Ebsworth Lawyers. Gail has extensive board experience having been Deputy Chairman of the Victorian Commission for Gambling and Liquor Regulation and a member of the boards of the Victorian Commission for Gambling Regulation, AGEST Super Pty Ltd, the Legal Services Board, the Law Institute of Victoria and Alliance Gold NL. She is also Chairman of the Victorian Fisheries Authority, a trustee of The Queen's Fund and a director of Choice Hotels Asia-Pac Pty Ltd.



**Daniel Leighton**  
BAPPSCI(HONS)

**Appointed:** 2008  
**Retired:** 2018

**Committees:** Strategic Marketing, Investments  
**Youth in Philanthropy:** Coach

Daniel is General Manager, Local Area Coordination at the Brotherhood of St Laurence. Prior to this he was the Chief Executive Officer of Inclusion Melbourne, a disability support provider. He currently serves on the Intellectual Disability Reference Group of the National Disability Insurance Scheme and is an inaugural member of the Ministerial Council for Volunteers. Previously he served as an advisor on the design of the National Disability Insurance Scheme. He has held a range of operational, policy and research roles in government and the community services sector.



**K. Jane Peck**

**Appointed:** 2014  
**Retired:** 2018

**Committees:** Strategic Marketing (Chair), Audit & Risk  
**Grants Advisory Panel:** Education & Employment (Co-chair)

Jane is on the Council of University College, a former president of the Lyceum Club Melbourne and Non-Executive Director of MS Victoria. Jane has broad executive experience across a number of sectors and business models, ranging from marketing to manufacturing with her particular strengths in consumer insights and stakeholder engagement.

## GRANTS ADVISORY PANELS

### Education & Employment

**Panel Chairs**

Andrew Baxter, Gail Owen OAM

- Dr Michelle Anderson
- Leo Fieldgrass
- Sue Hendy
- Rick Kane
- Carmel Morfuni
- Dr Sue Natrass AO
- Chris Thompson

### Environment & Sustainability

**Panel Chair**

- Craig Bell
- Trevor Huggard
- Dr Robyn Leeson
- Ken McAlpine
- Dr Kaushik Sridhar
- Professor Allan Rodger

### Healthy & Resilient Communities

**Panel Chair**

- Dr Sandra Hacker AO
- Dr Grant Blashki
- Rhyl Gould
- Irene Verins
- Lynne Wenig

### Homelessness & Affordable Housing

**Panel Chair**

- Robert McGauran
- Dr Tom Alves
- Professor Simon Biggs
- Kate Colvin
- Associate Professor Susan Feldman
- Associate Professor David MacKenzie

# STAFF

As of June 2019

We believe that community philanthropy transforms and changes communities for the better



From left to right: Harriet McCallum, Garry Tanner, Tara Navaratnam, Darren McConnell, Dianne Street, Kerry Jones, Jaishma Krishna, Andrew Deane, Irena Gray, Ingrid Rawsthorn, Stephanie Fichera, Kelly Sparke, Yung Le, Dr Catherine Brown, Kate Stewart, Daniel Padiaditis, Erin Dolan, Indiana Bridges and Glonaida Quiapon. Absent: Stephen Torsi, Lonia Catalano, Suzanne Doig and Laura Salvatore (Maternity leave)



**Dr Catherine Brown**

LLB, BA, GradDip BusAdmin, FAICD  
Chief Executive Officer

Catherine is a lawyer with a commitment to community and innovative philanthropy. After several years in commercial law, she worked in senior legal, management and consulting roles within the not-for-profit and within philanthropic sectors, before she joined the Foundation in 2011. Early this year, Catherine completed a PhD by practice related research related to philanthropic foundations and innovation at Swinburne University. She is the author of *Great Foundations: a 360° guide to building resilient and effective not-for-profit organisations* (ACER Press, 2010).

Catherine has held Victorian Government Board appointments as Chair or Deputy Chair of organisations in health, women's affairs and cemetery management.



**Indiana Bridges**

In-house Legal Counsel  
/ Board Secretary



**Kate Stewart**

Executive Administrator  
& Researcher



**Harriet McCallum**

Senior Program  
Manager Healthy &  
Resilient Communities



**Daniel Padiaditis**

Senior Program  
Manager Environment  
& Sustainability



**Erin Dolan**

Program Manager  
Homelessness &  
Affordable Housing



**Stephen Torsi**

Program Manager  
Education &  
Employment



**Yung Le**

Grants Administrator



**Darren McConnell**

Chief Financial &  
Operations Officer



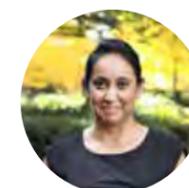
**Dianne Street**

Finance Manager



**Kelly Sparke**

Data Analyst &  
Community Insight  
Manager



**Jaishma Krishna**

Finance Officer



**Tara Navaratnam**

Finance Officer



**Kerry Jones**

Operations Manager  
(& Foote Donor Advised Program Liaison)



**Lonia Catalano**

Donor Services  
Coordinator



**Ingrid Rawsthorn**

Office Manager  
(Temporary)



**Irena Gray**

Receptionist



**Garry Tanner**

Chief Marketing &  
Development Officer



**Suzanne Doig**

Senior Manager  
Communications  
& Events



**Andrew Deane**

Donor Development  
Manager



**Stephanie Fichera**

Digital Marketing  
& Content Manager



**Glonaida Quiapon**

Graphic Designer



**Impact Philanthropy**  
**Activating the Philanthropy Toolbox**



Image:  
Inspiring Philanthropy Celebration, 2018



**AUDITORS**

**External Auditor**  
Deloitte Touche  
Tohmatsu

**Internal Auditor**  
Oakton

**LEGAL**  
Gadens Lawyers  
Justitia Lawyers

**LORD MAYOR'S CHARITABLE FOUNDATION**

Lord Mayor's Charitable Foundation Act 2017 (Victoria)  
Level 15, 1 Collins Street, Melbourne 3000  
GPO Box 1851 Melbourne 3001  
(03) 9633 0033

**info@mcf.org.au**

Lord Mayor's Charitable Foundation ABN 48 042 414 556  
Lord Mayor's Charitable Fund ABN 63 635 798 473  
The Eldon & Anne Foote Trust ABN 38 330 915 392

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