



HMS

ANNUAL REPORT 2004

HELEN MACPHERSON SMITH TRUST



Trustees

Darvell M Hutchinson AM, Chairman
J Barry Hutchins OAM

Staff

John A Bryson, Chief Executive Officer
W Barry Cook, Accountant
Liz Gillies, Grants Officer
Pamela Beech, Secretary

Investment Committee

Darvell M Hutchinson AM, Chairman
J Barry Hutchins OAM
J Gordon M Moffatt AM
John A Bryson

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Guidelines for grant applications
are available on our website.

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Introduction

The life of Helen Schutt was not one that made headlines. She lived comfortably and quietly, first in Melbourne, then in Europe, secure in the financial and social legacy of her family.

Helen was particularly fortunate in her forebears: on both sides they were hard working and energetic Scottish immigrants. On the Macpherson side they were good judges of land and excellent farmers while the Smiths were entrepreneurs with a talent in business, particularly as timber merchants. Helen was born Helen Macpherson Smith in Scotland in 1874 to her Scottish father, Robert Smith and her Australian mother of Scottish descent, Jane Priscilla Macpherson.

Helen attended school in Scotland, Europe and Australia.

In 1901, aged 27, Helen married William John Schutt. He was 33, a barrister, raconteur, Essendon footballer and later to become a Judge of the Victorian Supreme Court. Of the 22 years of their married life in Melbourne little is known. They had no children and Helen's name rarely appeared in the social pages of newspapers or magazines.

It is through the reporting of William's life, especially after his retirement from the bench, that we learn something of Helen's life in Europe where she lived from late in 1923 until her death in 1951.

In Europe, Helen travelled widely, with a base in both Switzerland and the south of France. She and William made extensive trips together in Europe, their activities widely reported in the press.

William Schutt died in 1933, aged 65, after an accident on board ship while returning to Australia from one of his many visits to Europe to see his wife.

And in 1951, while living in the South of France, Helen contracted pneumonia and died at the Hotel Majestic in Cannes.

The story of Helen could have ended there but for the fact that on her death she left her residuary estate of £275,000 (\$550,000) for the benefit of Victorian charities.

Despite this generous benefaction, Helen was buried in a paupers grave in the Saint Pierre cemetery in Marseilles. Later, acting on instructions from solicitors, her body

was exhumed and her remains cremated in accordance with her wishes. Helen's ashes were cast to the winds in the Marseilles cemetery. No tombstone or monument existed in honour of her lasting legacy to society, until the Trustees unveiled a monument beside her parents' graves in the Smith family plot in the Melbourne General Cemetery on St Andrews Day 2001, to commemorate the 50th Anniversary of the Trust.

The capital value of the Helen Macpherson Smith Trust at 30 June 2004 exceeded \$65 million, and in the year to June 2004, the Trustees approved grants of \$5.2 million to fund a range of Victorian charities across most sectors of community life. The 2004 year grants are detailed in this report.

Helen's legacy is perpetual and will continue indefinitely creating more and more income for distribution to charities in Victoria. Her financial legacy is not the only lasting mark of her family left on Australia and its people. Helen's forebears – both Macphersons and Smiths – were strong, energetic, and resourceful, and many family members contributed much to the advancement of Australian colonial life.

The capital of the Helen Macpherson Smith Trust was valued at 30 June 2004 at over \$65 million. Grants totalling \$5.2 million were approved in the year bringing aggregate grants to over \$50 million since the trust was established.

Trustees' Report

For The Year Ended 30 June 2004



*Darvell M Hutchinson AM,
Chairman of Trustees.*



*J Barry Hutchins OAM,
Trustee.*

Investments

After experiencing a reduction in the market value of our investments last year due to the general market downturn in 2003, our Investment Portfolio grew this year by 12.61 per cent. This pleasing performance came despite having accepted several substantial off-market buy-backs (Telstra, Fosters, CBA, IAG and Westpac) without which the portfolio would have grown in value by 16.38 per cent, comparable to the movements in major indices. Once again the advantage of a widely diversified portfolio was in evidence.

With few exceptions, we now seek to invest in stocks with enhanced potential for both capital growth and attractive yields boosted by Imputed Franking Credits. Although we continue to hold over 30 per cent of the portfolio in Australian Bank stocks, we have realigned the weightings of our bank holdings to reduce a previous major investment in Westpac. We now have a very well balanced banking portfolio.

Net Premium Income derived from selling appropriate Call Options against portion of the respective physical stockholdings increased considerably from the previous year. These proceeds are capital gains and assist the growth in the corpus of the Trust.

Investment income

Operating Income, at \$6.98 million, rose by 72.7 per cent from the previous year largely attributable to Imputed Franking Credits receivable from off-market buy-backs. This income represented an 11.36 per cent yield on the mean average market value of investments during the year.

Reporting of company results since the 2004 balance date, including announcements by some companies to offer buy-back

opportunities, continue to make us confident to reaffirm our prediction in last year's Annual Report "that yields from our portfolio of quality stocks will continue to grow to enable us to support a wide range of important community projects, thereby enhancing the quality of life of thousands of Victorians."

Grants

We received an extensive array of quality applications from a diverse range of Victorian charitable bodies involving almost all sectors of community life. Since the appointment of Liz Gillies as Grants Officer last year, we have seen the benefits of a more proactive and strategic approach to our grant-making processes. In particular, her efforts resulted in the culmination of a number of new working-partnerships during the year with Government or other philanthropic trusts in maximising the community benefit through matching grants. An exciting joint initiative with the Victorian Government resulted in the Macpherson Smith Community Alliance being launched in May 2004 to assist selected small communities in rural Victoria to further revitalise their towns. The Alliance is a \$1 million fund, representing matched grants of \$500,000 each from our Trust and Regional Development Victoria. Another exciting initiative was supporting the Victorian Community Care Coalition to undertake a community care awareness campaign in Victoria.

We were delighted to approve grants totalling \$5.2 million from net income earned in the year. We achieved new milestones in the 2004 year. For the first time in our history our grants to charities exceeded \$5 million in a year, and aggregate grants passed \$50 million during the 2004 year.

Administration

During the year we appointed John Bryson to the new position of Chief Executive Officer. John was an Equity Partner of J B Were for 16 years. His experience in the stockbroking industry will be highly valuable to the growth of our Trust. Building on our move to Nauru House, and the upgrade of accounting, administrative and communication processes, will now allow us to broaden our policy development and growth plans for the Trust. Barry Cook will continue as Accountant until June 2005, when he retires. Pamela Beech continues as our Secretary.

Staff appreciation

The Trustees have been ably supported throughout the year by our team of dedicated staff, led by Chief Executive Officer, John Bryson. Our more-focused strategies for grant-giving guided by Liz Gillies, and the introduction of the IRESS stockmarket software as a further enhancement to our computer systems have been key achievements during the year. Accordingly, we thank all staff members for their excellent contributions towards the growth of the Trust and its important grant-giving role to Victorian charities.

Darvell M Hutchinson AM
Chairman of Trustees

J Barry Hutchins OAM
Trustee

General Grants Made in 2003-04

Community Support

		\$
3BA FM Christmas Appeal – Radio Ballarat	Purchase of a computer to assist in the administration of the Appeal	2,500
Australian Council for Children and Youth Organisations Inc (Pahran)	Grant to support the accreditation process for organisations working with children	27,000
Australian Red Cross Victoria	Contribution to the purchase of a motor vehicle for the Patient Transport Service	5,000
Bendigo Health Care Group	Contribution to the refurbishment of the Autism Assessment Service	20,000
Bereavement Assistance Ltd (Pakenham)	Grant to pay the cost of a pauper's funeral	1,650
Bethany Community Support Inc (North Geelong)	Contribution to the refurbishment of the Family House	10,000
Breakaway Camps Inc – Lalar	Contribution to a Breakaway Camp	2,500
Brophy Family and Youth Services (Warrnambool)	Contribution to support the construction of the Community and Youth Complex	25,000
Centre for Grief Education (Clayton)	Development of the program 'Kids Place': An art activity group for grieving children	20,000
Children Australia Inc (South Melbourne)	'Lift Off With Language' project	25,000
Children's Protection Society Inc (Heidelberg)	Capital works for a Counselling Suite within a new Children's and Family Community Centre	20,000
Christian Emergency Food Centre Inc (Horsham)	Enlarging storage area and purchase of new fridges and freezers at the Centre. Installation of an inside toilet	10,000
Cottage By The Sea, Queenscliff Inc	Replacement of kitchen dishwasher	5,000
dulin inc (Preston)	Evaluation of the mentor program	50,000
Good Shepherd Youth and Family Service Inc (Collingwood)	Contribution to the 'Staying Connected' project	20,000
Habitat for Humanity Australia (Victoria) Inc	Contribution to building a home for a disadvantaged family in the Boronia area (Whitehorse Chapter)	5,000
The Kilbride Centre (Albert Park)	Funding for the Special Needs Recreation Program	2,500
Lifeline Geelong Inc	Funding to support the Suicide Bereavement Pilot Project	5,500
Lighthouse Foundation	Contribution to support establishment of a new house in the Cheltenham area (total commitment \$50,000)	25,000
Macpherson Smith Community Alliance	Establishment of a \$1 million fund on the basis of a matched grant from the Victorian State Government to support projects identified by the Community Capacity Building Initiative	500,000
Male Family Violence Prevention Association Inc (Richmond)	Contribution to support the 'Pathways for Volunteering' project	20,000



		\$
Melbourne Fringe (Fitzroy)	Contribution to support the 'Home or House' project	8,000
National Drugs Partnership (Carlton)	Establishment grant	20,000
One Umbrella (West Melbourne)	Support for a range of projects including website development and Volunteer training	10,000
Prison Fellowship of Australia – Victorian Council (Northcote)	Contribution to the 'Lives in Transition – From Custody to Community' program	10,000
Royal Melbourne Institute of Technology	Contribution to the SPAN Volunteer Tutor Program (SVTP)	20,000
The Salvation Army (Mont Albert)	Renovations of the Life Centre	37,257
Save The Children of Victoria (Auburn)	Support for nutrition program	2,500
Share Care Inc (Abbotsford)	Contribution to the Foster Care Replacement Program	5,000
South Gippsland Aquatic Centre (Leongatha)	Assist with funding for the South Gippsland Aquatic Centre	20,000
Southern Family Life Service Association Inc (Sandringham)	Contribution to the 'Community Caring for Children' project	50,000
Springvale Monash Legal Service Inc	Translation and printing of two legal information brochures into five languages	12,000
St John Ambulance Australia (Victoria) Inc – (South Melbourne)	Implementation of an improved communications network	15,000
St Joseph's South Yarra Emergency Housing Association Inc	An additional grant to support the development of five accommodation units for the homeless	15,000
St Luke's Anglicare (Bendigo)	Writing and publication of two books to support services offered by the organisation	17,100
State Schools' Relief Committee Inc (Burwood)	Towards new footwear and clothing for disadvantaged students	5,000
The Torch Project (Fitzroy)	Contribution to the production of a major performance project in Bendigo	25,000
Victorian Council of Social Services	Victorian Housing Rights Tribunal	20,000
Whitelion Inc (Parkville)	Support for Whitelion Employment Sustainability Program	25,000
Women's Circus Limited (Footscray)	Contribution toward additional Outreach Workshops	10,000
Youth Assist Inc/Visy Cares Centre (Dandenong)	Contribution to Operation Newstart South East	35,000
Youth Opportunity Program Ltd – Ross River Valley (Cheshunt)	Contribution to the development and implementation of a sustainability strategy	25,000
Total grants		1,188,507

General Grants Made in 2003-04

continued

Macpherson Smith Community Alliance

(Total Grant of \$500,000)

The Macpherson Smith Community Care Alliance, launched on 12 May 2004, is a joint initiative between the Victorian State Government and the Helen Macpherson Smith Trust.

The Alliance which was instigated by our Trust has established a \$1 million fund on the basis of a matched grant of \$500,000 each from the Trust and from Regional Development Victoria. The money from the fund will make a contribution towards the funding of projects identified by the Community Capacity Building Initiative.

The Community Capacity Building Initiative (CCBI), announced in May 2000, was a joint initiative between Regional Development Victoria and the Department for Victorian Communities and was supported by the Victorian Farmers Federation. Sixty different communities tendered to take part in this initiative. The 11 groups ultimately selected as CCBI projects involved more than 55 small towns in regional Victoria.

This CCBI program was built on the very important understanding that local people play a critical role in building the capacity of their communities, through their motivation, vision, energy and commitment. The Initiative aimed to build people capacity, locate key people and empower them, build relationships between existing organisations

and people in the community, develop the community, enhance the local economy, and involve outside organisations where there were skill gaps. The work of the CCBI project groups enabled the identification and development of a wide range of agreed community projects

The aim of the \$1 million Alliance is to assist the participating small rural Victorian communities to further revitalise their towns. Most importantly, the implementation of these projects is being driven by local communities through the support of local council to ensure that the local projects are delivered to the optimal benefits of the respective communities.

The first granting round took place in September 2004. Projects under consideration included a Regional Youth Leadership Training Program across all the CCBI locations, a Communities and Active Technology project, support for an Arts Collective, Unveiling the Regional Attractions project, a Family and Community Centre, and a Riverfront Renewal Plan.

"The Macpherson Smith Community Alliance is a great example of Government working in partnership with private organisations to deliver real outcomes for Victorians... The Victorian Government is proud to be working with the Helen Macpherson Smith Trust in

delivering such an innovative partnership that will help rural and regional Victoria and I wish it every success."

*John Brumby
Minister for State and Regional Development
Regional Development Victoria*

"The Helen Macpherson Smith Trust is delighted with the formation of a working partnership with the Victorian Government aimed at assisting Victoria's small rural communities... In conjunction with the Victorian Government's Community Capacity Building Initiative, the Macpherson Smith Community Alliance will focus on enabling these selected small rural communities to revitalise their towns. This mission aligns strongly with the heritage of our Trust's founder, Helen Macpherson Smith, and her forebears... The Macpherson Smith Community Alliance recognised the vital place Victoria's small rural communities occupy in our diverse and vibrant society. We also recognise the tenacity and determination they show in their endeavours to sustain and grow their towns and their local industries."

*Darvell M Hutchinson AM
Chairman of Trustees
Helen Macpherson Smith Trust*



Hon John Brumby launches the Macpherson Smith Community Alliance.



Education

		\$
Education Foundation Inc	Contribution to the evaluation of the School Volunteer Project	30,000
University of Ballarat	Contribution to Camp Street Precinct of the University of Ballarat (total commitment \$200,000)	50,000
Victorian Schools Innovation Commission	Contribution to support the Schools Volunteer Project	24,338
Total grants		104,338

Victorian Schools Innovation Commission & The Education Foundation

(Total Grant of \$54,338)

Intergenerational issues and volunteers in schools

Our Trust remains very supportive of projects which involve input by skilled volunteers, and we were excited by the prospect of encouraging the Victorian Schools Innovation Commission (VSIC) and the Education Foundation to join forces to examine how schools might make better use of volunteers.

VSIC's project grew out of a concern from the Office of Senior Victorians that there is an increasing gap in understanding between younger and older generations in our society. VSIC offered to test how a small number of school communities (five) might help to break down this intergeneration divide, through the development of mentoring relationships between students and older members of their communities. VSIC also had a specific interest on the impact of these mentoring relationships on student learning. Its longer-term interests is in recommending to government how these types of programs can best be supported across the school system.

The Education Foundation interest was in trialling in a small number of school communities (eight) a sustainable model for engaging volunteers of all ages. This has been supported by a grant from the Department of Education and Training.

In this program volunteers have worked in schools in a variety of capacities including, literacy development, workshop activities, art, textiles, agriculture and classroom and library support. Evaluations from students, teachers and volunteers are extremely positive and all pilot schools see much benefit. The work of both VSIC and the Education Foundation was bolstered in 2004 by additional financial support through the Helen Macpherson Smith Trust.

Community volunteers make major contributions to schools. They bring new perspectives and skills, they increase diversity, they provide a broader range of adult relationships and role models and they increase the adult time and energy available to individual students. Fortunately, volunteering is as much a bonus to volunteers' lives as it is to students, schools and their communities.

The clear social and educational benefits of volunteering in schools made this an important initiative to support and foster.

"If they (the students) receive one quarter of the benefit I receive from being with them, I will know I have made a contribution."
Senior volunteer



Volunteers acting as mentors for Victorian school children.

General Grants Made in 2003-04

continued

Health

		\$
Asthma Foundation of Victoria – North Melbourne	Contribution to the development and implementation of the 'Sustainable Regional Support Networks'	31,500
Austin Research Institute	Contribution to the Sir Zelman Cowen Cancer Foundation	50,000
Burnett Centre	Contribution towards the fit-out of the viral cultural laboratory in the Prahran Precinct (total commitment \$500,000)	100,000
Central Gippsland Health Service (Sale)	Contribution to the development of the Health Professionals Learning Complex	225,000
Centre for Eye Research	Contribution to a research into Macular Degeneration (total commitment \$100,000)	50,000
Cystic Fibrosis Victoria Inc (Southbank)	Support for the Sibling and Partner Support Program	10,000
Eastern Health Mental Program (Ringwood East)	Support for running of CHAMPS Camps	5,000
Epilepsy Foundation of Victoria (Camberwell)	Laptop computer for the mobile delivery of community education powerpoint and video modules	3,000
Haemophilia Foundation Australia (Glen Iris)	Contribution to a Family Camp	1,500
Howard Florey Institute (Parkville)	Purchase of the Ethovision System	34,866
International Diabetes Institute (Caulfield)	Establishment of a second 'Lift for Life – Mobile Strength Training Facility' for communities in the Golden Plains Shire, Surf Coast Shire, Otways Shire and surrounding communities	30,000
The Jean Hailes Foundation (Clayton South)	Contribution to the Research project: 'Health and Well Being After Breast Cancer'	180,000
La Trobe University	Purchase of equipment to support the program: Early Identification of Hearing Impairment amongst Culturally and Linguistically Diverse Communities	30,000
La Trobe University	Contribution to support the Physiotherapy Regional Partnership Project	30,000
Mental Health Research Institute (Parkville)	Establishment of a new Research Program in the Helen Macpherson Smith Laboratory which will provide a greater focus on identifying new drug targets for the treatment of serious mental illnesses	300,000
Monash Institute of Reproduction and Development (Clayton)	Research Project: Effects of Mitochondrial Perturbation on Oocyte and Preimplantation Embryo Physiology	20,000
National Heart Foundation of Australia Victorian Division (West Melbourne)	Contribution to the project to increase accessibility to the Eat Smart, Play Smart Manual in Victoria	25,000
Peter MacCallum Cancer Institute	Contribution to the Transitional Research Laboratory (total commitment \$100,000)	50,000
RDNS – Community Health	Contribution to the establishment of Helen Macpherson Smith Institute of Community Health (total commitment \$750,000)	100,000
Reconstructive Plastic Surgery Research Unit (Parkville)	Appointment of a Research Fellow	69,250
Skin and Cancer Foundation (Carlton)	Contribution to a Capital Appeal to acquire new premises	50,000
Southern Health Monash Medical Centre	Contribution to renovation and upgrade of temporary accommodation facilities for needy country patients and their families (total commitment \$50,000)	25,000
Spina Bifida Foundation of Victoria (Altona Meadows)	Contribution to the 'Improving the Livelihood of People with Spina Bifida' project	15,000
St Vincent's Institute of Medical Research	Refurbishment and preservation of facilities (total commitment \$300,000)	100,000
Upper Hume Community Health Service (Wodonga)	Contribution to the 'Milk of Human Kindness' project	60,000
Walwa Bush Nursing Centre	Contribution to the construction of a Health and Community/ Business Centre	50,000
Total grants		1,645,116



Burnet Institute

(Total Grant of \$500,000)

A major funding pledge during the year from the Helen Macpherson Smith Trust has allowed the Burnet Institute to establish a state-of-the-art Physical Bio-Containment (PC3) laboratory. This sophisticated facility provides valuable infrastructure support for Burnet's research in highly infectious (level 3) pathogens – agents causing disease.

The facility is one of only three in Victoria, and operates at negative air pressure so that outside air flows into the area and all exhaust air passes through special filters, which trap viruses. Entry into the facility is made through strictly controlled two-stage airlocks.

The Burnet Institute is Australia's largest independent medical research and public health institute that focuses on viral infectious diseases in humans. The Institute has a number of significant research programs focussing on understanding how viruses such as HIV and hepatitis C replicate and infect humans, as well as programs to develop vaccines, new therapeutic agents and improved detection methods.

Forty million people worldwide are living with HIV with 52 per cent of these women. The majority of HIV infection occurs through heterosexual transmission and new ways to prevent its spread are joust one of the areas of research at the Burnet Institute.

Within the PC3 facility, Burnet researchers have uncovered how cholesterol on the virus surface supports its replication, and how disruption of a fat coating on the virus surface can repress viral replication. This information is being explored to develop a topical agent (microbicide) to be controlled and administered by women to prevent HIV transmission.

The PC3 facility bring strong reassurance to its funding agencies that the Burnet has the infrastructure to perform leading-edge medical research. In addition, it enables the Institute to recruit and retain high calibre scientists, reaffirming its status as the leading virology research institute in our region. The Institute believes there is no doubt we will continue to be challenged by emerging infectious diseases in Australia and worldwide. These may be new human pathogens such as HIV, variations of previously encountered pathogens, or old infections resistant to current treatments like tuberculosis. Hence, Australia needs to have the capacity to provide leadership to respond appropriately to infectious disease challenges and to

develop strategies to deal with future threats. The Burnet's PC3 facility is well placed, and equipped, to meet these challenges through the assistance of the Helen Macpherson Smith Trust in providing support for this laboratory facility.



Scientist conducting important research into viral infectious diseases at Burnet Institute.



General Grants Made in 2003-04

continued

Aged Persons Care and Support

		\$
Abbeyfield Society	Grant to assist with alterations to residential accommodation	5,000
Australian-Polish Community Services Inc (Footscray)	Documentation of the development of Ethnic Aged Support Services	10,000
Benetas (Glenferrie South)	Dementia Specific Residential Unit and Day Centre Respite at Broughton Hall Camberwell	20,000
Caulfield General Medical Centre	Eight Floorline electrically controlled beds	17,520
Eastern Volunteer Resource Centre Inc (Ringwood East)	Replacement of a manual booking system by a computerised database	5,000
Echuca Benevolent Society Inc	Contribution to the development of the Aged Care Complex – New Horizons	20,000
Glenview Community Care Inc. (Rutherglen)	Contribution to the development of a new 10 bed hostel accommodation facility	20,000
Heatherlie Homes (Warrnambool)	Contribution to the construction of 16 residential units for aged residents	25,000
Helping Hand Foundation Inc (East St Kilda)	Active Lifestyles and Positive Ageing: range of projects including development of a database to link clients and volunteers, transportation costs and marketing of services	5,000
Hepburn Health Services	Contribution to Daylesford campus redevelopment (total commitment \$50,000)	25,000
Housing for The Aged Action Group Inc	Relocation Assistance Project for frail aged people facing homelessness	5,000
John Curtin Memorial Hospital Inc (Creswick)	Contribution to the 16 bed dementia specific unit extension	15,000
Kalkee Community (Geelong)	Contribution to the construction of accommodation for dementia sufferers and Independent living units (total commitment \$100,000)	50,000
Manningham Centre Association Inc (Doncaster)	Construction of the Snoezelen Room	20,000
Mayflower Retirement Community (East Brighton)	Aged Care Art Recreation Therapy Program	15,000
Multicultural Aged Care Services Geelong Inc	Grant to assist with furnishing and equipment	20,000
Nazareth House (Ballarat)	Purchase of two shower and change trolleys and two low level beds	5,000
Ottrey Homes – Cobram & District Retirement Village Inc. (Cobram)	Contribution to the building of a 10 bed Dementia Specific Wing	20,000
Sandringham Aged Care Association	Contribution to additional aged care beds including dementia specific beds at Fairway Hostel (total commitment of \$100,000)	50,000
Sea Lake & District Health Service Inc.	Redevelopment of facility and relocation of the hostel to meet 2008 Commonwealth certification requirements	25,000
Tongala & District Bush Nursing Memorial	Fire safety and amenities upgrade	10,000
Victorian Association of Health and Extended Care	Establishment of the Victorian Community Care Coalition	71,500
Wintringham (Flemington)	Additional grant to the \$100,000 granted in 2001 towards development of the Ron Conn Nursing Home	50,000
Yarramar Aged Care Services (Preston)	Purchase of shower chairs and high/low beds	5,000
Total grants		514,020



Wintringham

(Total Grant of \$150,000)

The Helen Macpherson Smith Trust has a long history of providing support to Wintringham, an innovative housing and aged care provider working with elderly homeless men and women.

Following the successful development of a number of low care residential services, community based care and housing related services, Wintringham found that it was becoming increasingly difficult to find appropriate high care facilities for their frailer residents. In order to provide services to those clients whose higher levels of care needs could not be addressed in an ageing-in-place residential or housing environment, the company responded by deciding to build its own high care facility.

Overseas colleagues have informed Wintringham that this facility, which will target those elderly people who are either homeless or at risk of becoming homeless, is quite likely to be the first such nursing home in the world.

The homelessness of its clients has meant that Wintringham has always regarded itself not as a residential care provider, but instead as a housing provider into which it delivers appropriate care for each individual client. It is this focus on housing which has enabled the company to seek and gain capital support from both the State and Federal governments for this project.

The Victorian Government in particular recognised the benefits to the State of having a specialist facility that would cater for its public housing eligible, frail aged people. As a consequence the State provided \$3.4 million to the project.

Wintringham again engaged Allen Kong Architect to design the nursing home, and started on a long process of informing and consulting with the local community and meeting with local Council, State and Federal politicians. The process culminated with their application to the City of Moonee Valley for a Town Planning Permit that was unanimously approved with no objections being received from the local community. This fantastic result brought great credit to the local Avondale Heights neighbourhood for its willingness to recognise that social services including aged care facilities are a necessary part of any community.



A special new high care facility for the homeless frail aged.

The nursing home has an expected completion date of May 2005.

"Once again as with many previous projects, I would like to acknowledge the support of the Helen Macpherson Smith Trust for its grant of \$150,000 and in particular to Dr Darvell Hutchinson and Mr Barry Hutchins who have consistently supported Wintringham in its efforts to develop services for homeless elderly men and women. Their support is greatly appreciated."

*Bryan Lippman
Chief Executive Officer
Wintringham*

General Grants Made in 2003-04

continued

Victorian Community Care Coalition

(Total Grant of \$71,500)

In May 2004, the Helen Macpherson Smith Trust funded Victorian Community Care Coalition (VCCC) to undertake a community care awareness campaign in Victoria. This is the first stage of a possible two stage project with the second stage involving the development of a best practice model for delivery of community care services in Victoria. The project is linked with a national campaign auspiced by Aged and Community Services Australia which was funded by The Myer Foundation. The Victorian coalition involves 17 partners, primarily key peak organisations considered important to achieving the project's objectives.

Key objectives

The Victorian Community Care Awareness program aims to:

- highlight the strategic importance of care in the community to all Victorian politicians and policy makers;
- raise the profile of care in the community so that the general public is aware of community options and the need for these to expand so that in turn public opinion will influence policy makers and Governments;
- strongly put the case to all politicians of the need for significantly increased funding to community care; and
- undertake work on developing a model for best practice in Victoria.

Project structure

VAHEC has employed a part-time Project Coordinator and Chairs a smaller Working Group of partner organisations to oversee the development, direction and implementation of the program. An agreed Memorandum of Understanding forms the basis of the working arrangements for the Victorian CCC.

What is community care?

It includes informal care through the unpaid workforce of carers and formal care, GP's, broad community health, allied health, pharmacists, preventative programs and education as well as those program funded by Commonwealth and State Governments

to provide community care. Hospitals also play a role in community care – for example, in rehabilitation and discharge planning.

The VCCC awareness campaign will focus on community care as it relates to supporting people with functional disability. This will effectively target Home And Community Care (HACC); Community Aged Care Packages (CACPs) and other State and Commonwealth Government community care programs.

The CCC and community care awareness program

Community care is generally not well known or understood by the general public or in the public policy arena – much of the emphasis is on the more intensive and higher cost residential care services. The overall aim of the awareness campaign is to ensure a greater knowledge, focus and priority on community care in public policy debate. Given this focus, the major target audiences are politicians and policy makers. This project is working with current service providers and their clients, carers and other family members and social networks to get the key messages to public policy makers.

Regional meetings

Nine regional meetings have been held, one in each Victorian Department of Human Services region. These meetings involved nearly 1,000 people and 40 speakers representing the interests of unpaid carers, service user and service providers. The Launch was held at the Eastern Regional meeting in July 2004.

A Key Messages document has been prepared and this together with other information about the CCC, is available on the website of the Victorian Association of Health and Extended Care (VAHEC) (www.vahec.com.au) Briefing meetings have been held with the Victorian Minister for Aged Care, the Shadow Minister and senior bureaucrats. The work of the Victorian CCC was mentioned by the Minister in a key-note address to a VAHEC seminar held in late August. A major strategic planning meeting was held in November to plan for continuing activities in 2005.

Ballarat Courier, letter to the editor, Saturday, 9 October 2004: Support needed for people who care

"We all aspire to own our own home, but what happens when you get that dream, but you can't stay there.

Times are changing, we are facing a future when the ageing population is rapidly increasing. Already there are waiting lists for services, and this can only get worse if governments don't realise the problem and put more money into services so people can remain at home.

I went to a forum recently called 'Who Cares' and it was wonderful to see so many people there talking about the future for services in the community and the concerns that they had, but it was distressing to realise that there is a problem now, people having to wait months for services.

A group sang a song about caring for someone which was very touching. I felt somebody did understand what it was like to be a carer. I was a carer for my father for many years.

It was inspiring to hear the speakers talk about what services mean for them and how important they were for people to stay in their own home.

I feel that as a community we need to support people to stay at home. Wouldn't you want to stay in your Australian dream?"

Mary Crowl
Ballarat



Professionals and volunteers combine to find new ways of supporting the elderly to stay at home.



Arts, Culture and Heritage

		\$
Australian Centre For Contemporary Art	Five year program of contemporary art commissions at ACCA which will be gifted to regional galleries	300,000
Dance Works Ltd (Pahran)	Performance season of the project 'Hotel Room'	10,000
Gertrude Street Contemporary Art Spaces (Fitzroy)	Contribution to the publication of 'A Short Ride in a Fast Machine: A Recent History of Contemporary Art'	10,000
Heide (Bulleen)	Technical fitout and outdoors areas of the new Education Centre	65,000
HotHouse Theatre (Wodonga)	Contribution to the production of 'Embers'	4,000
Ian Potter Museum of Art (Parkville)	Publication of the proceedings of the Symposium 'The Italians – Three Centuries of Italian Art'	2,500
Jewish Museum of Australia (St Kilda)	Contribution to the project – Cross Cultural Harmony Through Education	20,000
Melbourne International Chamber Music Group	Contribution towards the Ensemble Development Program involving the staging of master classes to prepare for competitions (total commitment \$40,000)	20,000
Museum Victoria – Immigration Museum	Major support for the exhibition 'Station Pier – Gateway to a New Life' highlighting immigrants to Melbourne over the 150 years of Museum Victoria	100,000
National Alpine Museum of Australia Inc (Mt Buller)	Support Edwin G. Adamson Exhibition	5,000
National Trust of Australia – Victoria	Contribution to the Writers Centre at 'Glenfern'	20,000
Orchestra Victoria	Implementation of the second stage of the Regional Visits Program in 2004-05	100,000
Shrine of Remembrance	Establishment of the inaugural education program for visiting Victorian school children titled 'Education to Remember'	48,000
Song Room Incorporated	Contribution to regional and metropolitan community performances and a Workshop Series	5,000
St Mary's Star of The Sea Church (West Melbourne)	Stonework Restoration Appeal	5,000
Triple R Broadcasters Ltd (Fitzroy)	Contribution to the establishment of a live performance studio in Triple R's new premises	20,000
University of Melbourne	Assistance with the publication costs of the project Painting and Song. A History of the Italian Illuminated Choir Book 1260-1560	10,000
Victorian College of the Arts	Music Theatre Tour – 2004 Pilot Program	12,000
Total grants		756,500

General Grants Made in 2003-04

continued

Australian Centre for Contemporary Art

(Total Grant of \$300,000)

The Helen Macpherson Smith Commission is an exciting new partnership between the Helen Macpherson Smith Trust and the Australian Centre for Contemporary Art (ACCA). This major new annual art commission will give a Victorian artist the opportunity to create an ambitious new work of art, accompanied by an exhibition in ACCA's prestigious exhibition hall.

Additionally, in an innovative move that will send the very latest in cutting-edge contemporary art across the State, the work will then be gifted to a selected regional Victorian public gallery.

The Helen Macpherson Smith Commission is a major development for the visual arts in Victoria. The endowment from the Helen Macpherson Smith Trust of \$300,000 over a five year period will allow one Victorian artist annually the profile and platform to take them into the next stage of their career.

At the official launch, Mary Delahunty, Victorian Minister for the Arts, said "This is a most important initiative that will have a huge impact on the careers of the artists who are selected for this Commission. ACCA is increasingly becoming known as Australia's most innovative contemporary arts space. In the past two years since its move to its stunning new premises in Sturt Street, it has

commissioned 22 new works and helped launch the national and international careers of many local artists" she said. "Artists can be certain this commission will put their names alongside those of the likes of Patricia Piccinini, Daniel von Sturmer and Susan Norrie, all of whom have exhibited major new projects at ACCA.

"But equally important is the Helen Macpherson Smith Commission's focus on regional Victoria, as it offers audiences across the state the opportunity to view the very latest in contemporary visual arts practice. I commend ACCA and the Helen Macpherson Smith Trust on this innovative new arts gift," the Minister for the Arts said.

In commenting on the new Commission, Darvell M Hutchinson, Chairman of the Helen Macpherson Smith Trust, said, "This is a most exciting new collaboration for the Trust. We have long been impressed by what ACCA offers to Melbourne and the arts community here, in particular the much-needed platform it provides for new and emerging art and artists. The Helen Macpherson Smith Commission offers us the opportunity to support ACCA during the early stages of its development. This is also an important outcome for philanthropy and the arts. The concepts behind the Helen Macpherson Smith Commission was a

collaborative effort between ACCA and the Trust – one in which both parties came together to discuss their own needs and goals. Given the Trust's commitment to regional Victoria we were delighted ACCA supported the notion of gifting new works to regional Victorian galleries. We are delighted that people living in regional Victoria will be able to access the exciting programs this highly innovative gallery offers and we saw this Commission as a way of making ACCA's program accessible to the whole state."

Recipients of the Helen Macpherson Smith Commission will be selected by ACCA's Artistic Director Juliana Engberg, and encouraged to create works of ambition and scale. The regional gallery partnerships, which will also involve a series of artist talks, workshops and education briefings devised by ACCA staff, will be forged on the basis of compatibility of gallery space and collection orientation.

The first artist to receive the Helen Macpherson Smith Commission will be announced in early 2005, along with the inaugural regional gallery partnership.



ACCA is Melbourne's premier contemporary art space presenting the most challenging, innovative and creative visual art of our time.



ACCA is a vital part of Melbourne's cultural landscape, and is located in the award winning, landmark rust-red structure in Sturt Street, Southbank.



Museum Victoria – Immigration Museum

(Total Grant of \$100,000)

Station Pier – Gateway to a New Life

Our Trust was mindful that 2004 marked the 150th Anniversary of the Museum of Victoria, and we were attracted to support a special exhibition titled 'Station Pier – Gateway to a New Life' at their Immigration Museum.

Moreso, as Station Pier is a heritage-listed site which also was celebrating its 150th anniversary and had obviously played a role in the migration of Helen's father, Robert Smith, and his brothers from Scotland. Famous as the site of Australia's first railway, Station Pier was the arrival point for hundreds of thousands, if not millions, of people migrating to find a secure new home in Victoria.

For thousands of migrants, the pier remains an icon that represents their sorrow at leaving home, hopes for a better life, joy at reuniting with loved ones, and apprehension of starting again in a very different land.

The exhibition 'Station Pier – Gateway to a New Life' was developed by Museum Victoria to highlight the special history of this pier, and its place as a trigger for the emotional memories of many former migrants and their families.

Station Pier – Gateway to a New Life documented the personal stories of people arriving at the Pier since 1854, particularly

highlighting the experience of the post-WW11 period. Many people from this time vividly and emotionally recall their first views of Melbourne from the Pier: the sounds and smells, the encounters with customs and immigration staff and their processes.

Station Pier evokes strong memories to migrants and they retain a vivid connection. Through the exhibition, the Immigration Museum was able to collect many of these personal stories and reminiscences, as well as personal objects that people either brought with them or collected along the way as souvenirs of their journey.

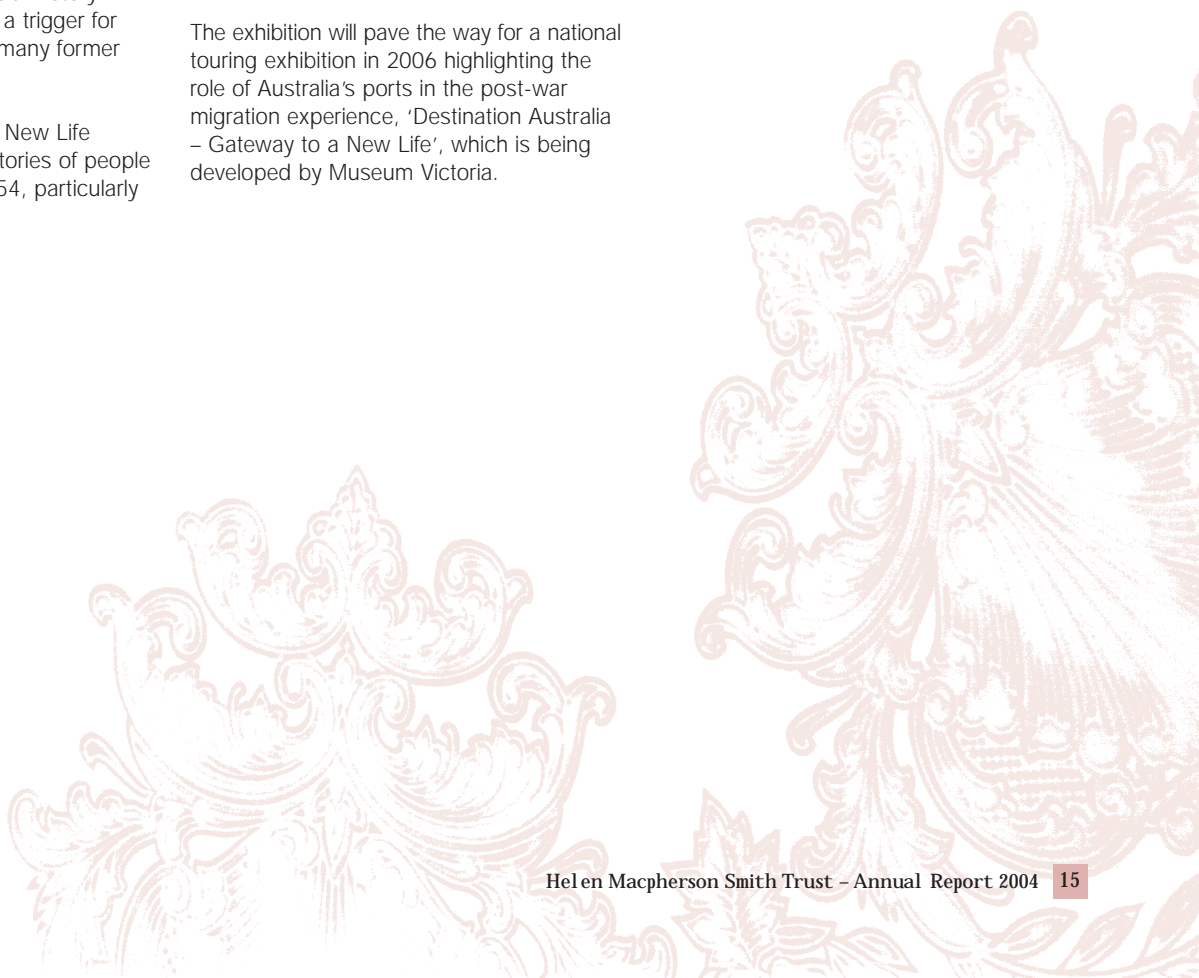
The Museum received a huge response to its public calls for material and reminiscences – an indication of how important a place the Pier remains for Victorians. The sea journey was for many their first and most lasting memory of travel.

Paying tribute to the history of official sea migration to Australia, 'Station Pier – Gateway to a New Life', aimed to evoke vivid images of the sea journey to Australia and the exotic ports visited during the journey.

The exhibition will pave the way for a national touring exhibition in 2006 highlighting the role of Australia's ports in the post-war migration experience, 'Destination Australia – Gateway to a New Life', which is being developed by Museum Victoria.



Boarding the Nelly at Bremerhafen, Germany, 1952. (Photograph courtesy of Teresa Liehwer)



General Grants Made in 2003-04

continued

Disabled Care and Support

		\$
Advisory Council for Children with Impaired Hearing (Victoria) – Blackburn	Fund one child to attend the School Transition Program	2,500
Access Employment (Bendigo)	Contribution to the establishment of Pepper Green Farm	5,000
Action for Community Living (Northcote)	Support for the Leadership Plus Program	50,000
Ararat and District Disabled Persons	Contribution to the purchase of a respite property (total commitment \$50,000)	25,000
Association for Children with a Disability (Armadale)	Contribution to the running of ten 'Supporting Siblings' and 'Education' Workshops in rural locations	9,500
Bendigo Community Preparation Program	Contribution to the development of a Community Garden at the Sandhurst Nursery	5,000
Broad Insight Group Inc (Dallas)	Contribution to the refurbishment of the Playground	5,000
Carronbank – School for Deaf Blind Students (Glen Waverley)	Contribution to the establishment of an outdoor learning area	5,000
Child and Family Care Network	Contribution to the construction of an Early Intervention Centre (total commitment \$75,000)	37,500
Diamond Valley Special Development School – Greensborough	Rebound Wall	5,000
Disability Justice Advocacy Inc (Abbotsford)	Contribution to the development of an International Disability Convention – Why we need it and how can I be involved	5,000
Epic Association Inc (Bundoora)	Contribution to the Social Skills Program	2,500
Gateways Support Services Inc (Geelong)	Purchase of Autism Assessment Test Kits	6,086
Goulburn Valley Support Group for Children with Special Needs Inc (Shepparton)	Special Kids Have Special Fathers Program	1,000
Impact Leisure Association Inc (Oakleigh)	Contribution to the purchase of a 12 seater bus	12,000
Interchange North West Inc (Pascoe Vale)	Support for the 'Let's Party' program	5,000
Jewish Care (Victoria) Inc	Contribution to the Active Support Pilot Program	60,000
Karkana Support Services Inc (Horsham)	Maintenance Projects	5,000
Kids Plus Foundation (Geelong)	36 place therapy program	20,000
Mansfield Adult Autistic Services Ltd	Storage for garden ornaments	1,500



		\$
McCallum Community Services Inc – Ballarat	Upgrade furnishings, furniture and whitegoods in two Client Residential Units	10,000
Melbourne Legacy	Contribution to the Disabled Dependants Activity Program	5,000
Moira Child & Family Support Inc (Moorabbin)	Contribution to the new house to replace the Moira-Helen Schutt House	75,000
mpower inc (Warrnambool)	Contribution to the Family Getaway Project	2,500
MS Society	Contribution to the Nerve Centre – a Lifestyle Assessment Planning Service (total commitment \$300,000)	100,000
Muscular Dystrophy Association Inc (North Melbourne)	Digitisation of hard copy data onto a CD Rom for disseminator to persons affected by Muscular Dystrophy as well as carers, families, medical and paramedical agencies that support them	10,130
Noraccomm (Watsonia North)	Purchase of land and building of two houses to accommodate those who are mildly disabled	20,000
Onemda Association Inc (Doncaster East)	Contribution to a renovation to increase services to intellectually disabled adults	10,000
Paraplegic & Quadriplegic Association of Victoria (Collingwood)	Equipment and Furniture for Coburg Community House	10,000
Royal Victorian Institute for the Blind	Computer upgrade to provide voice synthesized access to the internet	2,500
The Salvation Army (Mont Albert)	Purchase of equipment for the Creative Opportunities Woodworking Workshop	9,000
Scope (Vic) Ltd (Box Hill)	To support research in Disability incorporating the '1 in 4' Project	73,000
Scottsdale Supported Residential Service (St Kilda)	Feasibility study for two self-contained semi-independent living units	11,730
Travellers' Aid Society of Victoria	Publication of the history of the Society	3,000
Vermont South Special School	Digital Camera	1,500
Yooralla Society of Victoria	Music Therapy Program	3,000
Total grants		613,946

General Grants Made in 2003-04

continued

Scope (Vic)

(Total Grant of \$73,000)

Supporting innovation in research

In the past, Scope, formerly the Spastic Society of Victoria, participated in and undertook numerous research projects. However, Scope saw itself in the first instance as a service provider rather than a research agency. This meant that research depended to a certain extent on the personal interests and expertise of staff and tended to focus on therapy and related services. Scope also lacked the capacity to ensure that the research undertaken was embedded in its work, and that findings were widely shared.

Recently, it became clear that research was critical to Scope achieving its mission to enable people with disabilities to achieve their potential in welcoming communities. A more coordinated approach was seen as essential if Scope was to develop the capacity to:

- undertake strategically driven research and evaluation activities;
- support innovation in service delivery through relevant research;

- foster the development, design and implementation of research;
- promote and share research findings within the community; and
- support an evidence-based approach to services that demonstrates how Scope can 'make the difference' for people with disabilities, their families and support people.

As a result, Scope approached the Helen Macpherson Smith Trust to explore opportunities for partnership around the appointment of a Research Coordinator. Both parties were able to explore the possibilities and boundaries. The feedback provided by the Trust enabled Scope to make a deeper commitment to research. As a result, Scope was able to make a strong organisational and infrastructure commitment to the research coordinator position, which has resulted in a new and exciting initiative for Scope, and also a first for Australia.

The Trust contributed \$73,000 towards this project. \$50,000 will be allocated to the establishment costs of the position and an organisational development project that aims to develop a broader-based research capacity within the organisation. The funds will be used to generate research ideas and localised research plans, and provide staff not previously involved in research, with relevant skills and knowledge.

A further \$20,000 has been donated towards establishing an initiative designed to enable the voices of people with disabilities to be heard more broadly across the community. This will assist people with disabilities and their carers to directly inform and influence the thinking of decision-makers and key influencers.

The partnership between the Helen Macpherson Smith Trust and Scope, which will establish research as a key element of Scope's work, will result in some exciting outcomes that will be shared with others over the next two to three years.

Jewish Care (Victoria) Inc

(Total Grant of \$60,000)

Active Support Pilot Project at Jewish Care

Adults with disabilities living in group homes will be given the opportunity to learn new life skills and enjoy greater independence in the community thanks to an innovative pilot project, Active Support. The Active Support methodology was developed in the United Kingdom and introduced to Victoria by Jewish Care (Victoria) Inc.

Active Support is a systematic method of training staff to support group home residents so they can participate in everyday activities, rather than staff doing these activities for the residents. Currently, staff in Jewish Care's group homes complete all housework and daily living activities so they can spend more time with residents. Although it is more efficient for staff to complete these tasks, it leaves very little opportunity for residents to develop and improve their daily living skills.

Participating in activities, such as peeling potatoes for dinner or buying the daily newspaper from the local shop, helps to improve residents' self-esteem, and prevent

the boredom and frustration that can lead to challenging behaviours. With Active Support, residents have the opportunity to develop their skills and capabilities, improve their social interactions and, ultimately, enhance their quality of life.

Most importantly, Active Support helps to ensure that support is targeted to those residents who need it, and therefore significantly increases the participation of those residents with the greatest needs, including those people who display challenging behaviour.

This approach to the operation of group homes not only enhances the lives and future prospects of people with disabilities, but staff also gain greater job satisfaction and families benefit from seeing their loved ones more independent. It also offers a more positive outlook for children and adults with disabilities.

This innovative pilot project aims to encourage widespread adoption of Active Support, thereby potentially impacting on most Victorians with a disability. Jewish Care

will act as mentor to other agencies adopting the Action Support approach, and provide them with support, assistance and guidance.

This initiative was jointly funded by the Helen Macpherson Smith Trust and the Department of Human Services, with support from Sydney's Centre for Developmental Disabilities Studies and the Centre for Developmental Disability Health Victoria at Monash University.



Disabled adults find esteem and independence through the Jewish Care Pilot Project.

Environment

		\$
Australian Platypus Conservancy – Whittlesea	Purchase of an image/data projector for use in the environmental education program	2,500
Deakin University (Geelong)	Contribution to the research project ‘Social Capital and Land Conservation’	50,000
Gould League (Moorabbin)	Contribution to the Victorian School Grounds Development Program	55,000
Narmbool Trust – Ballarat	Contribution to the cost of accommodation for disabled students in a school/environmental complex (total commitment \$100,000)	50,000
Royal Botanic Gardens Melbourne	The Orchid Undercroft at the Australian Gardens, Cranbourne	215,000
Total grants		372,500

Royal Botanic Gardens

(Total Grant of \$215,000)

During the year the Helen Macpherson Smith Trust made a contribution towards the creation of a visionary Royal Botanic Gardens project – the Australian Garden, a garden for the 21st century.

Situated in the 363-hectare Royal Botanic Gardens Cranbourne – a 45 minute drive from Melbourne, ultimately 26 hectare Australian Garden will create a tourist and environmental education facility of international quality, showcasing the best of Australia’s remarkable flora in artistic landscapes. Encapsulating the main landscape characteristics of the continent, it will feature memorable displays highlighting the diversity and beauty of Australian plants, present a gallery of changing exhibition gardens, and incorporate major environmental sculptures and artworks.

The grant from the Helen Macpherson Smith Trust was in support for the Australian Garden Visitor Centre’s environmental and conservation education area – the Orchid Undercroft.

The Orchid Undercroft, which comprises the Education Amphitheatre and the Orchid Garden, will be the gateway through which

all visitors will pass and also the gateway to an educational experience on Australian plant life. The Education Amphitheatre will offer pre-school, primary, secondary and tertiary students and community groups conservation and environmental education learning opportunities in a world-class outdoor setting.

The first 11 hectares of the Australian Garden will open in late 2005 to reveal features including the awe-inspiring Sand Garden, the Rockpool Waterway, the Eucalypt Walk, and the Visitor Centre with its Orchid Undercroft.

Construction of the landscape works has commenced and the planting of the nearly 100,000 plants required to create this unique garden has started. Most of the advanced trees – some over four metres high – have been planted transforming many of the areas from a construction site to a living garden.

The Australian Garden at Cranbourne promises to be a site of national conservation, environmental, educational and horticultural significance, as well as one of Australia’s pre-eminent tourism venues.



Initial development of the Royal Botanic Gardens Australian Garden at Cranbourne.

General Grants Made in 2003-04

continued

Gould League

(Total Grant of \$55,000)

Schoolgrounds for living and learning – Schoolgrounds Masterplanning

The Helen Macpherson Smith Trust provided a grant to the Gould League to undertake Schoolgrounds Masterplanning with 40 schools in Victoria, and to develop internet-based resources to assist all schools in planning their school grounds development.

School grounds are a great resource for the school and local community and with a comprehensive, planned approach that is inclusive and consultative, schools will be able to develop their school grounds as a key place in the community. A planned approach also enables a school to maximise the use of their resources, opportunities of volunteer assistance, and access to funding and support programs.

Gould League has been educating children, schools and the general community about conservation and the environment for almost

100 years. Gould League is a small, non-profit organisation with a large influence in the area of sustainability education. School grounds are becoming increasingly important education resources and models of wise use of resources for the community.

Gould League and organisations overseas, such as Learning Through Landscapes in the UK, Enviroschools in NZ and Green School Grounds in Canada, have seen some amazing social, educational and environmental outcomes when school communities undertake school grounds improvement projects. These include a 28 per cent reduction in vandalism (UK study) and increased attendance seen for both students and teachers (Gould League case studies of Pinewood Primary School and Cobden Technical School, 2003) "Having direct experience gives relevance and meaning to what they're doing. If the children sat and looked at a book all day they wouldn't

get anywhere near the benefit of having 'hands-on', real-life experiences." Jo Witte, Southmoor Primary School.

School grounds are a place where students can experience real life project work. They provide an enriching and stimulating environment; encourage care, responsibility and citizenship; and create 'green corridors and islands' to link with other places of vegetation in the area. School grounds can contribute so much to the education, the environment and the welfare of our youth.

It is envisaged that the grant from the Helen Macpherson Smith Trust will create a vision and plan for the schools involved in the program and inspire other schools to embark on similar journeys to develop their school grounds into exciting, rich learning environments.



Children planning their new environmental school ground with help from Gould League.



Employment

		\$
Brotherhood of St Laurence (Fitzroy)	PSP Evaluation of Research Program	14,500
Total grants		14,500

Brotherhood of St Laurence

(Total Grant of \$14,500)

Personal Support Program Evaluation

The Personal Support Program (PSP) is administered by the Department of Family and Community Service and focuses on job seekers who are considered unable to benefit from mainstream employment services due to the multiple non-vocational barriers they face. This can include a wide range of issues including substance abuse problems, homelessness, mental health problems, domestic violence and social isolation. Under the PSP model, contract providers give counselling and personal support, referral to appropriate local services, and practical assistance. The goal of the program is to help participants to overcome or manage barriers and increase their economic and social participation.

The grant received from the Helen Macpherson Smith Trust has provided crucial funding to establish a research project to evaluate how effectively the Personal Support Program is achieving its objectives. The research is being undertaken by the Brotherhood of St Laurence in partnership with Melbourne Citymission, Hanover Welfare Services, and the University of Melbourne.

The evaluation is tracking a group of 200 PSP participants over a 12 month period and will examine the attainment of participant goals, economic and social outcomes, and change in the number and severity of barriers. Consultations will be held with PSP providers, Centrelink and FACS, as well as focus groups with a smaller number of participants. Other key areas to be explored include the effectiveness of the service delivery model, adequacy of resources and funding, and referral, transition and exit arrangements.

The broader aims of the evaluation are to improve the understanding of the effectiveness of PSP in order to:

- advocate for improvements to service delivery offered by providers;
- inform reviews and development of the program itself; and
- influence the development of broader employment assistance and social participation policies to disadvantaged income support recipients generally.

An interim report will be available in 2005 and the final report will be completed in 2006.

The Brotherhood of St Laurence believes that this project has the potential to make a significant contribution to understanding how support can be provided to the most disadvantaged job seekers. We also are very pleased to be working in partnership with the Brotherhood on such an important project.



The Brotherhood evaluation team.

Summary of Grants

		\$
Community support		1,188,507
Education		104,338
Health		1,645,116
Aged persons care and support		514,020
Arts, culture and heritage		756,500
Disabled care and support		613,946
Environment		372,500
Employment		14,500
Total of grants listed		5,209,427
Add grant allocated from 2003-04 income but previously reported		200,000
Less grants approved in previous years now cancelled		(123,600)
Total grants in financial statements of this Annual Report		5,285,827

Investments and Grants

A Historical Perspective

On her death in 1951, the late Helen Schutt left a bequest of £275,000 for the establishment of a charitable trust to benefit all Victorians.

The impact of this lasting legacy from Helen to the people of Victoria is exemplified in this summary of capital growth and grants over the now 52 years of the Trust.

Since the initial benefaction of \$550,000, the value of the corpus investments has grown to \$65.1 million, as reflected in the following table.

Corpus Investments

Year ended June

	Book value \$000's	Market value \$000's
1952	550	-
1965	1,049	-
1975	3,270	-
1985	8,748	-
1995	23,388	-
2000	41,046	49,700
2001	42,702	58,612
2002	45,610	62,364
2003	53,558	57,832
2004	57,873	65,123

Grants

Grants approved from the income earned on these investments have been:

Five years ended	\$000's
1970	93
1975	379
1980	1,324
1985	3,382
1990	7,712
1995	11,676
2000	9,883
<hr/>	
Year ended	
2001	3,133
2002	4,192
2003	3,552
2004	5,286
Total grants	50,612

Financial Summary

Statement of Financial Performance for the Year Ended 30 June 2004

	2004 \$	2003 \$
Income from investments	14,529,589	4,672,601
Less operating expenses	(1,182,457)	(558,615)
Operating surplus	13,347,132	4,113,986
Less transfers to capital		
Dividends from buy-backs	(7,248,189)	(576,438)
Premiums on call options	(300,020)	(53,758)
Net surplus	5,798,923	3,483,790
Accumulated income from previous year	192,876	261,423
Available for distribution	5,991,799	3,745,213
Grants approved during year	(5,285,827)	(3,552,337)
Accumulated income (30 June)	705,972	192,876

Statement of Financial Position as at 30 June 2004

	2004 \$	2003 \$
Current assets		
Cash, deposits and receivables	15,855,398	4,271,896
Investments at market value	209,520	-
	16,064,918	4,271,896
Non current assets		
Receivables	261,142	282,694
Investments at market value	57,185,962	56,178,845
Office furniture and equipment	51,913	38,761
Leasehold improvements	53,360	15,947
	57,552,377	56,516,247
Total assets	73,617,295	60,788,143
Liabilities		
Payables	3,649,919	195,592
Grants unpaid	4,033,265	2,510,800
Total liabilities	7,683,184	2,706,392
Net assets	65,934,111	58,081,751
Held for:		
Corpus	65,228,139	57,888,875
Income	705,972	192,876

A Historical Insight

Helen's Forebears: The Smiths



John Smith,
Helen's grandfather.



Violet Smith,
Helen's grandmother.



Robert Smith,
Helen's father.

As mentioned in our 2003 Annual Report, the Trustees intend to give readers of our Annual Reports an insight over the next few years into the family background of our benefactress Helen and her lasting legacy.

The story below on Helen's maternal grandfather, John Smith, is the second in this series and follows on from the story on Helen's paternal grandfather, John Macpherson, in last year's Annual Report.

Helen's father, Robert Smith, came from a long line of Border Scots, whose lineage can be traced to at least 1613. They lived in the village of Darnick, near Melrose, which lies between the River Tweed and the triple Eildon Hills, in the picturesque border country of Scotland.

Melrose is important in Scottish history, with a monastery established in the seventh century and later, in 1136, Melrose Abbey, recognised as one of the most beautiful ecclesiastical buildings in the country.

The importance of the Smiths to Scotland is recognised by three monuments within the grounds of Melrose Abbey, marking the lives of 27 of the family, including Robert, Helen's father.

However, Robert, and Helen's mother, Jane Priscilla, are both buried in the Smith family plot in the Melbourne General Cemetery, where on St Andrews Day in 2001, a 'coming home' monument to Helen and her lasting legacy was unveiled to commemorate the 50th Anniversary of the Trust.

The most prominent member of the Smith family was John Smith, Robert Smith's father and Helen's grandfather. The life of John Smith (1782-1864), is closely linked with one of Scotland's most famous sons, writer Sir Walter Scott (1771-1832), author of the famous romantic and historical series known as the Waverley novels.

Born in 1782 and the fifth of nine children, John Smith's life as an architect, sculptor and builder spanned a long career which left a permanent mark on the landscape of Scotland.

John Smith's diary shows a man of energy and charm with an ability to move at all levels of society. He was equally accepted in his own social circle of traders and businessmen and by the nobility and gentry, including his clients, the Earl of Buchan and Sir Walter Scott, who are both mentioned frequently in his diary.

On May 31st, 1818, John Smith married Alison Purves. They had 14 children – nine sons and five daughters.

Although John Smith's diary had previously recorded his association with Sir Walter Scott, his work load increased around 1820 when he worked steadily on changes to 'Abbotsford'. Scott named the property 'Abbotsford' because it stood on land where the monks of Melrose Abbey used to cross the river in earlier times. When Sir Walter Scott moved to 'Abbotsford' in 1812, complete with family, domestic servants, farm animals and dogs, the property consisted of 110 acres of land and a small home which Sir Walter intended to increase by alterations to the house itself and by additional buildings.

John Smith was responsible for some of these new buildings and for some of the changes to 'Abbotsford'.

The Guide to Abbotsford, written for today's traveller, describes John Smith's activities:

"He and his brother were the premier builders in the Borders at this time, operating from the ancient village of Darnick. Thomas supervised the actual building work, while John devoted much of his time to drawing up the plans for their numerous projects and attending to accounts. He designated

himself as 'Architect and Sculptor', but he could also have used the term 'civil engineer' had it been current then, for many Border bridges owe their existence to his talent."

John was employed as a sculptor by the eccentric Earl of Buchan, a man keen on the erection of statues and busts.

Seven of John's sons migrated to Melbourne between 1850 and 1857, and became successful business men of colonial Victoria, particularly as timber merchants.

In 1850, the first two of John Smith's sons, Charles and John, set out for Australia, from where they maintained strong family links with their father. Thereafter, John Smith's diary frequently records him purchasing timber for their Australian business.

In 1854, William and Thomas, aged 20 and 22 respectively, left Liverpool to join their older brothers. Helen's father, Robert, accompanied by his brother George, followed later, and James arrived in 1857.

Their sister, Jane, came to Australia in 1859 to keep house for them as their timber business expanded. A letter to her from her father in June 1859 records: "You are of so much use to your brothers and so much appreciated... some of them will be getting wives lively at no distant date. I think Charles should be looking about him for something of the kind, but as far as Mother and I can understand him, he has no engagement as yet nor any prospect of the kind."

John Smith died at Darnick on September 13, 1864, aged 81 and his obituary describes him "as the architect and builder of some of the most conspicuous and beautiful mansions in the district."

The Smiths made a significant contribution to Scotland. Patriarch, architect and builder, John Smith left his sons a legacy that helped them achieve success in a foreign land.





Helen's hand written note reflects the generous intention of her legacy to the many Victorian charities that have benefited from that generosity, and to those who will do so in the future.

Helen Macpherson Smith Trust

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