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HELEN MACPHERSON SMITH TRUST *Annual Report 2009*

## HELEN MACPHERSON SMITH TRUST

is an independent perpetual philanthropic trust established by Helen Macpherson Schutt (*née Smith*) in 1951 for the benefit of Victorian charitable institutions.

We approve grants to a wide variety of eligible charities and a diverse range of projects that seek to benefit the people of Victoria.

AGED CARE + ARTS, CULTURE & HERITAGE +

COMMUNITY SUPPORT + DISABILITY CARE & SUPPORT +

EDUCATION + EMPLOYMENT & VOCATIONAL TRAINING +

ENVIRONMENT + HEALTH



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### TRUSTEES

Darvell M Hutchinson AM  
*Chairman*

Frances H Awcock AM  
Keith B Smith

### STAFF

Anthony H B Baird  
*Investments Executive*

Darren J McConnell  
*Finance Executive*  
Christopher W Wootton  
*Grants Executive*

Sarah C Bartak  
*Grants Program Officer  
& Communications Officer*

Pamela J Beech  
*Receptionist &  
Office Administrator*

### INVESTMENT COMMITTEE

Darvell M Hutchinson AM  
*Chairman*

Frances H Awcock AM  
Anthony H B Baird  
John A Bryson  
*(to December 2008)*  
Darren J McConnell  
J Gordon M Moffatt AM

### BANKERS

National Australia Bank

### LEGAL ADVISERS

Freehills

### AUDITORS

PKF

### CONTACT INFORMATION

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Guidelines and forms for  
grant applications are  
available on our website.

# Our Founder and her legacy

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The capital of the Helen Macpherson Smith Trust was valued at 30 June 2009 at \$76.6m.

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Grants totalling \$10.5m were approved in the year bringing aggregate grants to \$80.2m since the Trust was established.

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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 years old, a barrister, raconteur, Essendon footballer and later to become a Justice 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 early in 1924 until her death in 1951.

In Europe, Helen travelled widely, living mainly 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 abroad to travel with Helen.

In April 1951, while living at the Hotel Majestic in Cannes on the French Riviera, Helen contracted pneumonia and died.

Helen's story could have ended there but for the fact that on her death she left £275,000 (\$550,000), being the majority of her considerable wealth, to establish a philanthropic trust to benefit Victorian charities.

Despite this generous benefaction, Helen was buried in a pauper's 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 Andrew's Day 2001, to commemorate the 50th Anniversary of the Trust.

The capital value of the Helen Macpherson Smith Trust at 30 June 2009 was \$76.6m, and in the year to June 2009 the Trustees approved grants of \$10.5m to fund a range of Victorian charities across most sectors of community life. The grants made are detailed in this Report.

As a perpetual legacy, Helen's Trust will continue indefinitely. Her forebears — both Macphersons and Smiths — were strong, energetic and resourceful. Many family members contributed much to the advancement of Australian colonial life. It is fitting that the financial legacy of Helen and her family continues to leave a lasting mark on Australia and its people.

# Trustees' Report

The 2009 financial year for the Trust could be categorised as a rollercoaster year, with downward slides in the market value of its investments, yet coupled with exciting highs in its grants distributions.

The declines in global financial markets challenged not only private enterprise, both big and small, but also brought restraints right across the philanthropic sector, and the Trust was not immune. However the third quarter of the year saw the start of a rally in the Australian share market which alleviated some of the doom and gloom predictions that prevailed for most of the year. Despite this, by 30 June 2009, the Trust's capital was still down by 21% to \$76.6m.

On the high side of the rollercoaster, the Trust enjoyed a record contribution to income from the sale of call options which allowed for \$7.30m for granting purposes, up from \$6.43m in 2008. The 2009 year also saw the Trust make its largest single grant yet of \$5.75m to establish the Macpherson Smith Rural Foundation Limited, as an independent charitable institution for rural and regional Victoria. The Foundation was incorporated on 3 July 2008, and you can read about the progress made by it further in this Report. As in previous years, the Trust received an increasing number of requests for assistance over previous years, not entirely as a result of the global financial crisis but also as a result of a greater awareness of the Trust's work, coupled with the growing Victorian community it serves.

## CAPITAL AND INVESTMENTS

From an investment viewpoint, the financial year can be divided into two periods. During the first nine months of the year, the stock market, which began its decline in November 2007, continued falling until mid-March 2009. By this time, the market had more than halved from its peak and had fallen 40% since the end of June 2008.

Over the following two and a half months there was a strong recovery of 27%, but the grim reality of the investment mathematics for the 2009 financial year was that the market lost 24% of its value, the worst experience for any financial year since 1981-82. Since we had raised cash regularly as the market peaked in 2007, we had a good level of liquid assets starting the financial year but we reinvested some of those liquid assets back into stocks a little early.

## INCOME

The 2008-09 year was a most challenging year to derive gross income levels to maintain desired grant distributions. The Reserve Bank cut official interest rates six times in seven months, which brought the cash rate down from 7.25% to 3.00%. In October, as fears that runs on US banks might spread to other countries, the Australian government guaranteed the deposits of Australian banks. These actions caused a big reduction in the returns the Trust was able to earn on its cash balances. Together with the many cuts in dividend payout ratios announced across the corporate sector in response to lower profitability, this put further pressure on the Trust's income. However the Trust enjoyed a record profit from its call options activity and as a result, total net income after expenses available for granting purposes rose from \$6.43m last year to \$7.30m. The overall income return on the Trust's investment assets was 11%. (2008 – 8.2%)

## FINANCE & ADMINISTRATION

The abridged financial statements of the Trust for fiscal 2009 set out in this Report show that total revenue for the year from all sources including net realised capital gain on sales of investments totalled \$9.692m. Total operating costs incurred for the year amounted to \$1.246m, reflecting a ratio of 12% of revenue. (Excluding net realised capital gains a ratio of 14%)

## GRANTS

In terms of granting, it has been a busy year for the Trust. We continued to make grants across our broad range of philanthropic programs as detailed in this Report. In addition, the Trustees, like so many Australians, were deeply affected by the terrible tragedy of the Victorian bushfires which occurred in the summer of 2009. In response, the Trustees established a special \$2m HMS Bushfires Grants Fund which is available primarily to help restore the community spirit and social networks of the ravaged townships and is in addition to the Trust's normal grants rounds. Details of the Fund are on page 9. From 446 external applications seeking a total of \$28m, the Trustees approved a record \$10,505,764 for 148 grants to Victorian charitable institutions from the Helen Macpherson Smith Trust and the HMS Bushfires Grants Fund, including the special grant to the Macpherson Smith Rural Foundation. A total of 35 grants totalling \$752,189 were approved from the Macpherson Smith Community Alliance. Details of our grantmaking activities for the year are set out in the Grants Overview of this Report.

## Trustees



**Darvell M Hutchinson AM**  
*Chairman of Trustees*



**Keith B Smith**  
*Trustee*



**Frances H Awcock AM**  
*Trustee*

## STAFF APPRECIATION

As in previous years, the Trust's permanent staff of Tony Baird, Darren McConnell, Chris Wootton, Sarah Bartak and Pamela Beech once again provided outstanding support for the Trust's philanthropic endeavours. Also providing support to the Trust on a casual basis were Gordon Moffatt (investments), Andrew White (finance), Louise Andersson and Elma Gradascevic (administration) and Shirley Goldsworthy (archives).

The Trustees would like to express their appreciation to all staff for their dedication to the Trust and their commitment to its important grant-giving role throughout Victoria.

## OUTLOOK

In the first three months of the current 2009-2010 financial year, the Australian stock market indices recovered 20%. While economic conditions in Australia are not as dire as elsewhere, the wellbeing of the Australian economy will continue to be heavily dependant on the financial health of our major trading partners. It appears that neither the United States nor Europe will rebound quickly and, if that proves to be the case, then growth here will remain restrained. We do not expect a quick return to the annual growth levels seen regularly over the past 15 years, hence further stock price increases will be limited and income yields for the Trust will remain under pressure. Despite these possible challenges, the Trust looks forward to cautious growth of the capital base in order to maximise our significant grant-giving role throughout Victoria.

**Darvell M. Hutchinson AM**  
*Chairman of Trustees*

**Frances H. Awcock AM**  
*Trustee*

**Keith B. Smith**  
*Trustee*

## Staff



**Anthony Baird**  
*Investments Executive*



**Darren McConnell**  
*Finance Executive*



**Chris Wootton**  
*Grants Executive*



**Sarah Bartak**  
*Grants Program Officer  
& Communications Officer*



**Pamela Beech**  
*Receptionist & Office  
Administrator*

# Grants Overview

2009 was a significant year for the Helen Macpherson Smith Trust. In its 57th year of existence it saw the Trust make its largest grant ever of \$5.75m to the Macpherson Smith Rural Foundation, a new entity operating in regional Victoria (see page 9). In addition, a wealth of programs from charitable organisations across the State were supported for the benefit of the Victorian community. Altogether 13 ongoing grants and 135 new grants were approved totalling \$10,505,764.

## COLLABORATIVE PROJECTS

Throughout the year, the Trust maintained its approach to philanthropy which is to build, foster and strengthen strategic relationships and collaborative partnerships with peer philanthropic trusts, charitable organisations and all levels of government.

## YOUTH MENTORING PARTNERSHIPS

Since 2007, the Trust and the State Government, through the Office for Youth (Department of Planning and Community Development), have jointly supported the development of quality youth mentoring programs across the state. In the course of the partnership, assistance has been provided to over 150 youth mentoring programs, which in turn support over 8,000 young people and their volunteer adult mentors.

Following an independent evaluation funded by the Trust and conducted by Victoria University, both parties agreed to continue their support for youth mentoring for 2010 and 2011. Under this new agreement, the Trust and the State Government will each provide:

- \$300,000 over two years to continue support for six youth mentoring regional coordinators who are attached to the following lead agencies: St Luke's Anglicare; Brophy Family & Youth Services; Gippsland Mentoring Alliance (Baw Baw Latrobe Local Learning and Employment Network ); Metropolitan Melbourne Youth Mentoring Implementation & Coordination Project; Grampians Regional Mentoring Network (Lead On Ballarat); and North East Support & Action for Youth;

- \$100,000 over two years to conduct research into the effectiveness of youth mentoring models; and
- \$120,000 over three years to support the sustainable development of the Victorian Youth Mentoring Alliance.

There is a huge community interest in the use of mentoring as a major tool to assist disengaged youth to realise their full potential. This joint initiative will further support the development of high quality mentoring programs across the state, provide new tools and best practice guides, and create fully accredited training programs for mentors.

[www.youthmentoringvic.org.au](http://www.youthmentoringvic.org.au)  
[www.youth.vic.gov.au](http://www.youth.vic.gov.au)

### IMAGE

Philip M. Pandongan performing at the launch of the Youth Mentoring Partnership.





## INDIGENOUS PARTNERSHIPS

The Trust is also an active participant in two indigenous collaborative partnerships:

- The Loddon Mallee Philanthropic Partnership aims to improve the health and wellbeing of aboriginal communities in the Loddon Mallee Region and comprises representatives from philanthropic trusts, the Department of Human Services (DHS), Mildura Aboriginal Corporation (MAC) and Murray Valley Aboriginal Cooperative (MVAC). The Trust and DHS are jointly funding a Self-Determination Plan (Capacity-Building) for MAC.
- The Aboriginal and Torres Strait Islander Community and Philanthropic Partnership Project aims to increase and strengthen relationships between the Victorian Aboriginal community and the philanthropic sector and comprises representatives from philanthropic trusts, indigenous organisations, Victorian Council of Social Services (VCOSS) and is chaired by the Koorie Heritage Trust (KHT). The Trust is contributing \$30,000 per year for three years to support an annual capacity building training program, the development of a website, direct support and 'best-practice guides' for indigenous organisations seeking funding and regional workshops. Collaborative funding is being sought from other trusts/foundations.

## OTHER GRANTS

On the following pages, we profile the creation of the HMS Bushfires Grants Fund, the on-going work of the Macpherson Smith Community Alliance, the establishment of the Macpherson Smith Rural Foundation and four selected case studies, as well as the full list of grants approved during the year.

## OUR APPROACH TO GRANTING

The Trust reviews its approach to granting every three years to ensure that it meets changing community needs and remains in accordance with the Will of the late Helen M Schutt (née Smith). The Trust funds grants across eight program areas:

- Aged Persons Care and Support
- Arts, Culture and Heritage
- Community Support
- Disabled Care and Support
- Education
- Employment and Vocational Training
- Environment
- Health and Medical Research.

Generally, the Trust prefers applications which involve partners and the leveraging of significant funds from other sources.

The Trust seeks applications from eligible Victorian-based charitable organisations by conducting three grant rounds per year (end September, January and April). The Trust also welcomes the opportunity to discuss potential applications prior to submission. All applications are acknowledged by email and all eligible applications are considered by the Trustees through their Grants Committee. The outcomes arising from the deliberations of the Grants Committee include written advice to all applicants - both successful and unsuccessful; an eGrants Bulletin, which is distributed listing all approved grants from each round; and the list of successful grantees posted on the Trust's website.

The Trustees place considerable emphasis on evaluation both in terms of the performance of the Trust itself and in terms of the community impact and sustainable outcomes of the projects that the Trustees support. As such, an acquittal report is also required when successful projects are completed.

## THANK YOU

Finally, the Trust would like to acknowledge all applicants for their efforts and the work that they do in helping their fellow Victorians in need. This year has been difficult for many and the Trust has attempted to assist where it could. Due to limited resources, we were unable to approve many applications. We would, however, like to congratulate all of our successful grantees for the work that they are doing and thank them for giving the Trust the opportunity to make a difference.

# Case Studies



## Macpherson Smith Rural Foundation Limited

\$5.75 million

The Helen Macpherson Smith Trust established the Macpherson Smith Rural Foundation Limited with a grant of \$5.75m (\$5m Capital Endowment Fund, \$750,000 Future Rural Leaders Scholarship Program). The MSRF is a new charity dedicated to the welfare and educational opportunities of regional and rural communities across Victoria.

The Foundation aims to strengthen the fabric of rural communities in Victoria through:

- Undertaking collaborative programs addressing disadvantage and promoting educational and vocational opportunities;
- Building and managing an extensive scholarship program to benefit rural students;
- Creating enhanced links between young people and educational institutions;
- Promoting compulsory education and employment pathways and transitions for young people leaving school;
- Developing and promoting future leaders of local and regional communities;
- Providing educational opportunities for a tertiary education for those disadvantaged by distance, personal circumstance or economic hardship, complete with a mentoring program for its scholarship holders by linking them with people identified through the Foundation's contacts and its growing body of knowledge; and
- Establishing a research base that will inform the Foundation of significant gaps in access to tertiary education for rural students.

The Directors of the MSRF are:

The Hon Rob Knowles AO – *Chairman*  
 Ms Fran Awcock AM  
 Mr Darvell Hutchinson AM  
 Mr Duncan Malcolm AM, JP  
 Ms Winsome McCaughey

The initial role of the MSRF is to offer a Future Rural Leaders Scholarship Program, which is aimed to assist tertiary education opportunities for rural based Year 12 students who possess leadership qualities and a dedication to the improvement of rural lifestyle.

The first scholarships will be offered in 2010 for the 2011 academic year. The Foundation also appointed Mr David Hatherell, as a part-time Rural Manager who is based in Ballarat to establish the Scholarship Program.

### ABOVE

The Directors and staff of the Macpherson Smith Rural Foundation. From left: Mr Darvell Hutchinson (Director), Mrs Winsome McCaughey (Director), Mr Rob Knowles (Chairman), Mrs Frances Awcock (Director), Mr Duncan Malcolm (Director) and Mr David Hatherell (Rural Manager). Photo: GDesign Studio

In the wake of the horrific bushfires which took place in February 2009 across Victoria, the Helen Macpherson Smith Trust resolved to make a significant direct contribution towards assisting the restoration of community life in the rural townships which were damaged or destroyed by the fires. A special \$2 million fund was established for this express purpose.

### HMS Bushfires Grants Fund

\$130,700

The Trust holds the view that philanthropy's role in the aftermath of the bushfires lies in the medium to long-term segments of the recovery efforts, and should be related to rebuilding community lifestyles and spirit. Grants from this special Fund will be made to local and state-wide charitable organisations specifically in support of capacity-rebuilding projects and programs to restore the community life of the damaged Victorian townships.

The goal of the grants is to support and facilitate the communities' own recovery in the post-disaster era, once the immediate emergency aid programs are completed, and government and private sector infrastructure projects are underway. Our grants are not focussed on supplying emergency aid or restoration of infrastructure, which the trustees regard as the responsibility of government and the major charities that receive public donations.

The first grants from the HMS Bushfires Grants Fund were awarded in June 2009, totalling \$130,700.

### Cobaw Community Health

*The AFTER Project: Art from the Extended Region – \$10,700*

To design, construct and erect a mosaic created through the use of community contributed objects embedded into mosaic tiles on a side wall of the Kyneton Town Hall to commemorate the fourteen homes lost and one church in the Redesdale/Sidonia/Coliban area fires.

### Emergency Accommodation and Support Enterprises (EASE)

*Solving the Jigsaw - \$18,000 over two years*

To conduct Jigsaw, a school-based early intervention program to strengthen community connectedness and resilience in young people at the Redesdale Mia Mia Primary School.

### Evolve at Typo Station

*From Ashes to Aspiration - \$40,000*

To provide a 12 month in-school and residential program for 30 identified year 7-9 students (and involving their families) from Yea and Alexandra Secondary Colleges who are displaying symptoms of trauma arising from the bushfires.





### **New Horizons Welfare Services Inc**

*Our Place - \$10,000*

To provide a 'one stop shop' for information, referral, resources, emergency aid distribution and community development focus for renewal activities.

### **Regional Arts Victoria**

*Big Screen Marysville - \$25,000*

To re-locate the old Federation Square Big Screen to Marysville for 17 weeks commencing in September to provide a community focus point for events, direct feeds from cultural performances and live events and other programs in efforts to help rebuild community spirit.

### **RSPCA Vic**

*RSPCA Assistance for People with Animals affected by Bushfires - \$7,000*

To provide practical one-on-one specialist animal behavioural training, environmental enrichment toys, regular information seminars and other support for owners of animals affected by the recent bushfires.

### **Wimmera Uniting Care**

*The Coming Together Project - \$20,000*

To engage the Haven & South Drung communities who experienced the recent Remlaw Bushfire in a community cultural development program to produce a piece of public art which will be a permanent sculpture at Haven Hall, the southern entrance to Horsham.





### Macpherson Smith Community Alliance

\$754,362

The Macpherson Smith Community Alliance (MSCA) is a four year collaborative partnership between the State Government, the Helen Macpherson Smith Trust and in 2009 included the Victorian Council of Social Service (VCOSS). The MSCA provides grants for community-based projects to assist small rural and regional communities across Victoria to manage and adapt to change and create thriving communities.

More than 100 small towns participate in the Government's Community Building Initiative (CBI). Each CBI brings residents, businesses, government, local council and community organisations together to set priorities for their community, and then work to make their projects a reality. The MSCA provides funds for these projects to assist local communities to leverage support from other potential funders.

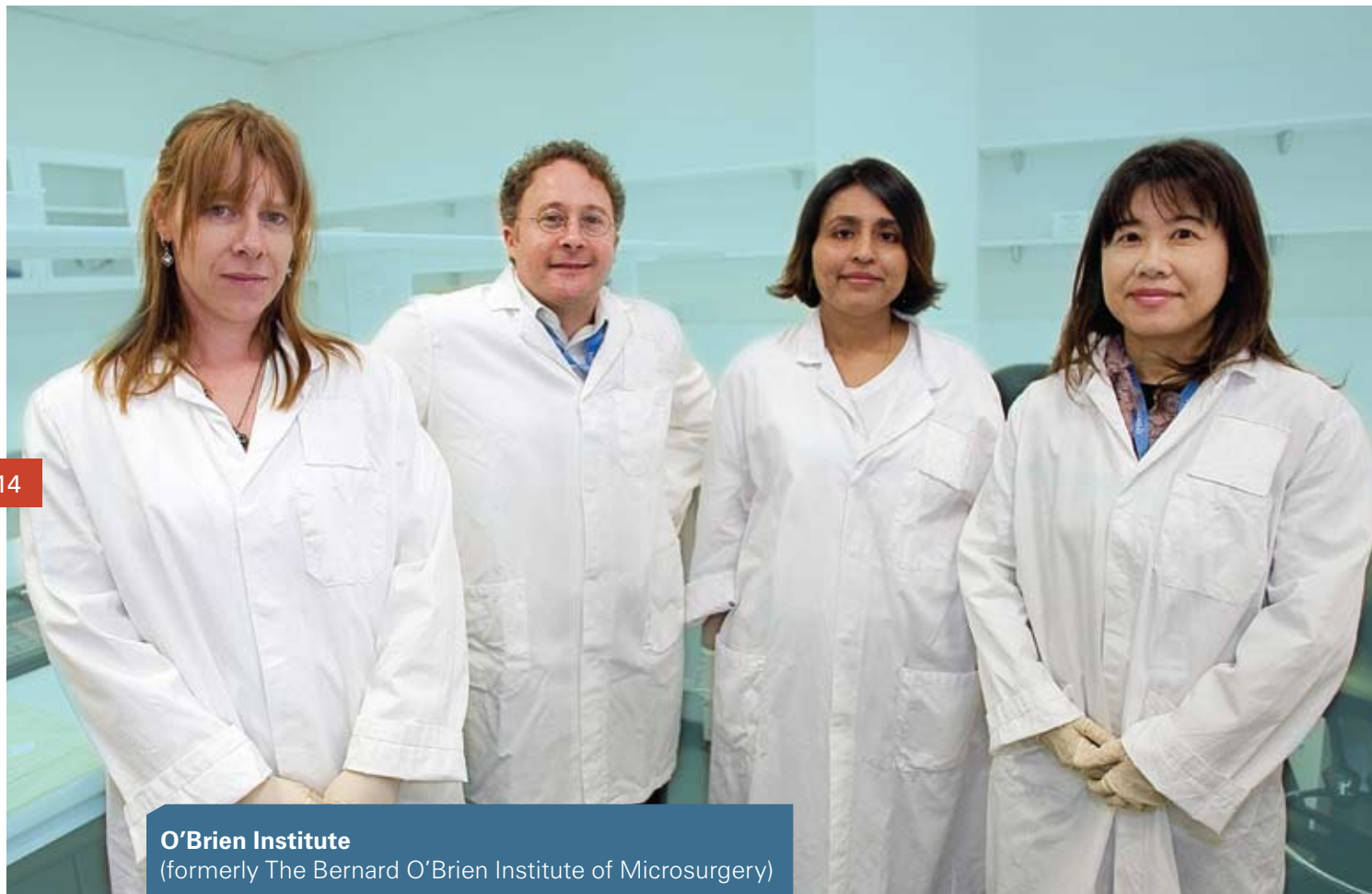


The Macpherson Smith Community Alliance (MSCA) awarded 35 grants totalling \$754,362 to a wide range of community-led projects, namely:

<b>Alpine Area: Youth Leadership Project</b> \$5,000 <i>Alpine Shire Council</i>	<b>Hopetoun: Mallee Bush Retreat Development Stage 4</b> \$26,420 <i>Yarriambiack Shire Council</i>	<b>Upper Yarra: Community Environment Park</b> \$40,000 <i>Shire of Yarra Ranges</i>
<b>Bridgewater &amp; Inglewood: Multipurpose Trails</b> \$30,000 <i>Loddon Shire Council</i>	<b>Hopetoun: Memorial Hall Cool Room</b> \$2,010 <i>Yarriambiack Shire Council</i>	<b>Wandiligong: A Valley Through Time</b> \$2,000 <i>Alpine Shire Council</i>
<b>Buchan &amp; District: Community Plan</b> \$5,000 <i>East Gippsland Shire Council</i>	<b>Horsham: Mt Arapiles Experience Trail</b> \$51,600 <i>Horsham Rural City Council</i>	<b>Warracknabeal: Town Hall Upgrade</b> \$18,583 <i>Yarriambiack Shire Council</i>
<b>Bunyip: Multipurpose Auditorium Construction</b> \$100,000 <i>Cardinia Shire Council</i>	<b>Hopetoun: Streetscape</b> \$5,886 <i>Yarriambiack Shire Council</i>	<b>Warracknabeal: Y-Fest Promotion and Celebration Project</b> \$4,380 <i>Yarriambiack Shire Council</i>
<b>Charlton: Travellers Rest Information Centre</b> \$104,000 <i>Buloke Shire Council</i>	<b>Jeparit: Tennis &amp; Anglers Club New Clubroom</b> \$5,000 <i>Hindmarsh Shire Council</i>	<b>Whittlesea: Township CBI Donnybrook Shuttle Bus Service</b> \$33,000 <i>City of Whittlesea</i>
<b>Dimboola: Nine Creeks to Dimboola – Wetland, Walking &amp; Bicycle Tracks</b> \$30,000 <i>Hindmarsh Shire Council</i>	<b>Inglewood: Community Gardens – Volunteer Training</b> \$4,205 <i>Loddon Shire Council</i>	<b>Wycheproof: Great Grain Festival</b> \$5,000 <i>Buloke Shire Council</i>
<b>Donald: BBQs</b> \$11,335 <i>Buloke Shire Council</i>	<b>Minyip: Emma's Community Facility Upgrade</b> \$20,000 <i>Yarriambiack Shire Council</i>	<b>Wycheproof: Men's Shed: Securing the Future</b> \$15,000 <i>Buloke Shire Council</i>
<b>Flowerdale: Spring Valley Recreation Reserve Toilet</b> \$30,000 <i>Murrindindi Shire Council</i>	<b>Nyora: Recreation Reserve Feasibility Study</b> \$10,000 <i>South Gippsland Shire Council</i>	<b>Wycheproof: Wycheproof On Track (Town Newsletter)</b> \$2,000 <i>Buloke Shire Council</i>
<b>Gannawarra: Young Professionals Network (GYPN)</b> \$10,000 <i>Gannawarra Shire Council</i>	<b>Pearcedale: All Weather Shelter</b> \$10,200 <i>City of Casey</i>	<b>Yinnar: Firmin Bell Re-establishment</b> \$5,000 <i>Latrobe City</i>
<b>Harrietville: Green Waste Management Project</b> \$21,270 <i>Alpine Shire Council</i>	<b>Penshurst: Community Plan</b> \$29,000 <i>Moyne Shire Council</i>	
<b>Harrietville: Pioneer Park Playground Project</b> \$23,180 <i>Alpine Shire Council</i>	<b>Porepunkah: Public Hall Disability Access Redevelopment</b> \$35,000 <i>Alpine Shire Council</i>	
<b>Harrietville: Tronoh Toilet</b> \$28,900 <i>Alpine Shire Council</i>	<b>Rainbow: Community Facility Feasibility</b> \$20,000 <i>Hindmarsh Shire Council</i>	
<b>Hopetoun: Community Gym Development</b> \$6,795 <i>Yarriambiack Shire Council</i>	<b>Rupanyup: Jack's Track Upgrade</b> \$4,598 <i>Yarriambiack Shire Council</i>	

**LEFT**  
Don McNaughton,  
a member of the  
Wycheproof Men's  
Shed, hard at work.  
Photo: Jenny Pollard





**O'Brien Institute**  
(formerly The Bernard O'Brien Institute of Microsurgery)

\$300,000 over 3 years for a Leadership Fellowship to establish the Victorian Centre of Excellence in Adult Stem Cell Medicine

Since 1970, the O'Brien Institute has led the way in clinical and experimental research, developing into the largest surgical Institute dedicated to the advancement of microsurgical reconstruction and research in the world. In addition to pioneering techniques in reconstructive microsurgery, the Institute carries out internationally recognised scientific research in the fields of Tissue Engineering and Vascular Biology.

#### ABOVE

Dr Jeremy Crook and his team. *From left:* Ms Tracey Lomas (*Senior Research Assistant*), Dr Crook, Ms Shirani Sivarajah (*Coordinator of the Australian Stem Cell Bank*) and Dr Nao Kobayashi (*Senior Scientist of the Stem Cell Medicine group*). Photo: GDesign Studio

The Trust has provided a grant of \$100,000 per year for three years to the O'Brien Institute for the appointment of Dr Jeremy Crook, the inaugural Director of the newly established Victorian Centre of Excellence in Adult Stem Cell Medicine.

Stem cells may one day provide a quantum leap in our ability to treat many debilitating diseases and traumas. Although initial results are promising, medical treatments using stem cells are still at an early state. The successful use of stem cells will require in-depth scientific inquiry and unique medical expertise.

The Institute has a long history in reconstructive therapies and microsurgery. It takes a multidisciplinary approach, combining expertise from chemical engineering, biological sciences and surgery. More recently its scientists and clinicians have developed new tissue engineering technologies designed to complement microsurgery treatments. The Institute is uniquely placed to translate its scientific and technological advances into clinical applications. Accordingly, it is also ideally placed to translate learning from stem cell sciences into medical therapies. The marriage of stem cell therapies and the Institute's established tissue engineering techniques will provide a truly innovative approach to bring regenerative surgery to life.

The Leadership Fellowship funded by the Trust is an important endorsement to sustain a career path for a repatriated international talent in this highly competitive field. In addition to attracting an internationally recognised expatriate back to Victoria, the appointment of Dr Crook will draw and help recruit high calibre stem cell experts to the new Centre.

Ultimately, the aim for the Centre is to afford a unique focus and bridge between cell-based therapies and the clinic, assisting in translating the potential of adult stem cells into a surgical and medical reality.





#### Drummond Street Relationship Centre

\$25,000 for the Somali Women's Community Enterprise Project

Drummond Street Relationship Centre is a quality service provider of child and family relationship counselling; groups for parents, children and young people; and education and training services for professionals and those working with families across a range of sectors.

**ABOVE**  
Selling their global pies at Collingwood Children's Farm Farmers' Market – over 250 pies were sold in one hour! Photo courtesy of Drummond Street Relationship Centre

The Somali Women's Community Enterprise Project was a capacity-building initiative that brought together a group of Somali women from Melbourne's inner west to provide them with the opportunity to develop pathways to meaningful employment and economic self-reliance through community enterprise development, vocational training and English language tuition.

Many of the women participating in the project were single mothers or with absent husbands and had limited social support and opportunity for social interaction. As a fairly new community group to Australia, they were also dealing with the challenges of a different cultural and social structure. Facing language barriers, low literacy and a limited understanding of Australian culture and systems meant the women faced significant obstacles to meaningful employment and ability to participate in their local community.

The project involved a long process of community consultation; business planning with external consultants; the establishment of the Walaalsha (Home) Tutor Program; the implementation of accredited training in hospitality operations; and piloting the Walaalaha Global Kitchen as a community catering enterprise.

The project evolved significantly during the project period, not only achieving but surpassing its original goals. The project now involves over 50 women as community participants, volunteers and paid staff who are committed to working together to advance the social conditions of women and their families from the Somali community.



## Phunktional

\$28,800 for *Calling The Shots*

Phunktional is a cutting edge arts organisation causing catalytic change through the delivery of dance, theatre film and youth projects across marginalised communities. Its mission is: "To make entertaining art that creatively explores issues about conflict and social justice, promoting wellbeing and sustainability."

**ABOVE**  
Students participating  
in a workshop for  
*Calling The Shots*  
at Red Cliffs  
Secondary College.  
Photo: Afoto.com.au

'Calling the Shots' is a partnership project engaging youth at risk in Mildura in an innovative program of education and wellbeing activities, culminating in the production of an interactive DVD to be used for peer to peer education, as a harm minimisation tool for teachers to use in classroom, and as a vehicle for dialogue around sensitive issues within school communities.

Participants will engage in a theatre making process with a public outcome (live performance) for their wider community. The stories created by the young people for the live performances will then form the basis for script writing, further skills development and filming. Through the artistic process, young people will explore and identify issues they may experience or come into contact with in their environment. These include bullying, drug use, depression, risk-taking behaviour, racial discrimination, sexual assault and relationships amongst peers and adults.

The film will become an interactive DVD forming the basis of a health education resource kit for young people nationally. The DVD will investigate the choices young people aged 14-18 years make, promoting positive health messages to then be shared with other young people. The Mildura region is characterised by culturally diverse social groups which has been a source of tension and violence in the area. The project aims to bring together and support local organisations engaging with at-risk youth, fostering partnerships and building a strong, more cohesive Mildura community.

In addition to the Trust, partners in the project include: Mildura Aboriginal Corporation; Two Rivers College; Merbein, Red Cliffs and Mildura Secondary Colleges; Victoria Police (Mildura), Department of Education regional representatives; Mallee Sexual Assault Unit and Mallee Domestic Violence Service; Mallee Sports Assembly; Mallee Family Care; School Focused Youth Service at Mildura Rural City Council; Mildura Arts Centre; and VicHealth.



When I  
listen from the  
deepest  
part of me,  
I hear  
God's voice

17

### Prahran Mission

\$45,000 to establish  
Voices Vic, the Hearing  
Voices Network of Victoria

Prahran Mission seeks to partner with those who have or have had a mental illness or experience extreme social and economic disadvantage in order to facilitate a full and meaningful life. It offers a range of services and programs. For over 60 years it has worked to address those attitudes, institutions and policies which create and perpetuate inequality.

**ABOVE**  
Photo courtesy of  
Prahran Mission

A group of almost 24,000 people in our community 'hear voices' (referred to in psychiatric terms as auditory hallucinations due to psychosis/mental illness), and as a result experience extreme social, health and economic disadvantage. Prahran Mission aims to establish a Hearing Voices Network across Victoria to improve the recovery and social outcomes for people who suffer from this debilitating illness, with groups established in most major metropolitan and regional areas.

The Hearing Voices Network project will deliver at least seven ongoing peer support groups in its first year, with the aim of growing to 40 groups in four years' time. The project will provide leadership, support, training and development to Hearing Voices group facilitators (including voice-hearers). The Network will have a consumer-led focus with voice-hearers included and supported at all levels and roles. Group facilitation will gradually transition from worker/voice-hearer co-facilitation to voice-hearer only facilitators leading true self-help groups.

The project aims to build awareness and engagement of the Network across the mental health sector and broader community, and seeks to build an evidence base through research which will demonstrate the individual and broader socioeconomic benefits of the Hearing Voices Network.

Partners in the project are expected to include mental health service providers (clinical and rehabilitation) across Victoria including Melbourne metro and regional centres across the state as well as research bodies, voice hearers, carers and friends. The Helen Macpherson Smith Trust has provided funding for the first year of this four year project.

# 2009 Grants

PROGRAM AREA	2009 \$	2008 \$
Aged Care	212,698	626,850
Arts, Culture & Heritage	634,533	878,800
Community Support	7,457,210	2,645,228
Disability Care & Support	544,353	498,292
Education	260,440	152,182
Employment & Vocational Training	256,679	293,617
Environment	237,137	225,000
Health	908,954	512,906
HMS Bushfires Fund	130,700	–
<b>TOTAL GRANTS APPROVED</b>	<b>10,642,704</b>	<b>5,832,875</b>
<b>GRANT ADJUSTMENTS</b>	<b>(136,940)</b>	<b>(107,962)</b>
<b>TOTAL GRANTS IN FINANCIAL STATEMENTS OF THIS ANNUAL REPORT</b>	<b>10,505,764</b>	<b>5,724,913</b>

A

**Action for Community Living**  
[www.advocacyhouse.org/lac/about.html](http://www.advocacyhouse.org/lac/about.html)

Organisational Capacity Building  
 Disability Care and Support  
 \$100,000

**Anxiety Recovery Centre Victoria**  
[www.arvcvic.com.au](http://www.arvcvic.com.au)

On-Line Support Group for People Living with Social Anxiety Disorder  
 Community Support  
 \$8,000

**Ararat & District Disabled Persons' Association**  
 Purchase of Lounge Furniture  
 Disability Care and Support  
 \$9,364

**Australian Centre For Contemporary Art**  
[www.accaonline.org.au](http://www.accaonline.org.au)  
 Helen Macpherson Smith Commission 2010  
 Arts, Culture and Heritage  
 \$60,000

**Australian Centre for Grief & Bereavement**  
[www.grief.org.au](http://www.grief.org.au)  
 Kids Grieve Too – Regional Roll Out  
 Community Support  
 \$23,560

**Autism Behavioural Intervention Association**  
[www.abia.net.au](http://www.abia.net.au)  
 Strengthening Family Capacity to Deal with the Challenges of Autism  
 Disability Care and Support  
 \$10,000

B

**Baker Heart Research Institute (grant transferred from RMIT University)**  
[www.baker.edu.au](http://www.baker.edu.au)  
 Conversion of Human Skeletal Muscle Precursor Cells to Mature Brown Adipose Tissue for the Treatment of Obesity  
 Health  
 \$17,200

**Bendigo Theatre Company Inc**  
[www.bendigotheatrecompany.org](http://www.bendigotheatrecompany.org)  
 Turning Around: Purchase of a Revolving Stage and Surround  
 Arts, Culture and Heritage  
 \$12,000

**Boroondara Aged Services Society**  
[www.basscare.org.au](http://www.basscare.org.au)  
 Purchase of Palliative Care Mattresses  
 Aged Care  
 \$6,700



**Brenda House Inc**  
Domestic Violence  
Organisational Development  
Project  
Community Support  
\$25,000

**Brotherhood of St Laurence**  
[www.bsl.org.au](http://www.bsl.org.au)  
Australian Dairy Entry-level  
Employment Pathway  
Employment and Vocational Training  
\$60,000  
(\$120,000 total commitment paid over  
two years in 2008 & 2009)

**Burnet Institute**  
[www.burnet.edu.au](http://www.burnet.edu.au)  
Victorian Immunology  
Monitoring Facility for  
Vaccine Development  
Health  
\$75,000

## C

**Calvary Health Care  
Bethlehem Limited (Hospital)**  
[www.bethlehem.org.au](http://www.bethlehem.org.au)  
Huntington's Disease  
Dream Room  
Health  
\$15,000

**Cancer Council Victoria**  
[www.cancervic.org.au](http://www.cancervic.org.au)  
Venture Grants Scheme:  
Cancer Research  
Health  
\$33,333

(\$100,000 total commitment paid over  
three years in 2008, 2009 & 2010)

**Carinya Society**  
[www.carinyasociety.org.au](http://www.carinyasociety.org.au)  
Mature Age Area  
Disability Care and Support  
\$25,000

**Centre for Education and  
Research in Environmental  
Strategies**  
[www.ceres.org.au](http://www.ceres.org.au)  
CERES Food Trail Project  
Environment  
\$30,137

**Centre For Eye  
ResearchAustralia**  
[www.cera.org.au](http://www.cera.org.au)  
Glaucoma Optic Nerve  
Evaluation Project  
Health  
\$63,240

**Children's Charity Network**  
[www.childrenscharity.com.au](http://www.childrenscharity.com.au)  
Young Offenders Program  
Community Support  
\$24,200

**Christian Emergency Food  
Centre Inc**  
[www.cefc.org.au](http://www.cefc.org.au)  
Preparation and Distribution  
of Drought-Relief Christmas  
Hampers  
Community Support  
\$7,000

**Church Of All Nations**  
[www.carlton-uca.au](http://www.carlton-uca.au)  
Carlton Employment  
Opportunities for African  
Women  
Employment and Vocational Training  
\$50,000

**Clifton Hill Baptist Church**  
Athol Gill Community Centre  
Renovations  
Community Support  
\$10,000

**Community Connections  
Victoria Ltd**  
[www.comconnect.com.au](http://www.comconnect.com.au)  
Supportive Volunteering  
Pathways  
Disability Care and Support  
\$60,000

**Cooinda Village Inc**  
[www.cooindavillage.org.au](http://www.cooindavillage.org.au)  
Refurbishing and Upgrading  
Kitchen and Dining Room  
Aged Care  
\$20,000

**Country Education Project Inc**  
[www.ccp.org.au](http://www.ccp.org.au)  
E Kids – Rural Extended  
Learning Online  
Education  
\$75,000

**Crisis Support Services Inc**  
[www.crisissupport.org.au](http://www.crisissupport.org.au)  
Counselling Internship Program  
Employment and Vocational Training  
\$50,000

**Cultural Infusion Ltd**  
[www.culturalinfusion.com](http://www.culturalinfusion.com)  
Victorian Cultural Artists  
Training Pilot Program  
Employment and Vocational Training  
\$25,000

## D

**Deakin University**  
[www.deakin.edu.au](http://www.deakin.edu.au)  
Is High Dietary Salt Related to  
Obesity in Australian Children?  
Health  
\$30,000

**Deakin University**  
[www.deakin.edu.au](http://www.deakin.edu.au)  
Small Molecule Inhibitors of  
Apical Bile Acid Transporter in  
the Ileum as Therapeutic Agents  
for Hypercholesterolemia  
Health  
\$20,000  
(\$56,000 total commitment paid over  
three years in 2009, 2010 & 2011)

**Deakin University**  
[www.deakin.edu.au](http://www.deakin.edu.au)  
Design and evaluation of a  
seamless, flexible service model  
for community-based aged care  
Health  
\$50,000  
(\$200,000 total commitment paid over  
three years in 2008, 2009 & 2010)

**Disability Resources Centre**  
[www.drc.org.au](http://www.drc.org.au)  
Strengthening the Voice of  
Victorians with Intellectual  
Disability  
Disability Care and Support  
\$30,000

**Doxa Youth Welfare Foundation  
- Melbourne**  
[www.doxa.org.au](http://www.doxa.org.au)  
Engaging At Risk Students  
at Doxa School Bendigo  
Education  
\$75,000

**Drummond Street  
Relationship Centre**  
[www.dsrmc.org.au](http://www.dsrmc.org.au)  
Somali Women's Community  
Enterprise Project  
Employment and Vocational Training  
\$25,000

## E

**Eastern Community Legal  
Centre**  
[www.eclc.org.au](http://www.eclc.org.au)  
Human Rights are Aussie Rules  
Arts, Culture and Heritage  
\$10,000

**Eastern Emergency Relief Network Inc**  
*www.easternemergency.org.au*  
Emergency Relief Parcels  
Community Support  
\$10,000

**Emmy Monash Home For The Aged**  
*www.emmymonash.asn.au*  
High Care Chairs  
Aged Care  
\$7,990

**Evolve at Typo Station**  
*www.evolve.org.au*  
Education Development Program  
Education  
\$50,000  
(\$100,000 total commitment paid over two years in 2008 & 2009)

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**F**

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**Far East Victorian Landcare Inc**  
*http://eastgippsland.landcarevic.net.au/groups/far\_east*  
Mobilizing Community Blackberry Action in Far East Gippsland  
Environment  
\$25,000

**FareShare**  
*www.fareshare.net.au*  
One Million Meals from 500,000kg of Rescued Food  
Community Support  
\$25,000

**Flat Out Inc**  
*www.flatout.org.au*  
Centre for the Human Rights of Imprisoned People, Young Criminalised Women's Multimedia Story-Telling Project  
Arts, Culture and Heritage  
\$25,000

**Florey Neuroscience Institutes**  
*www.fni.edu.au*  
Improving Health Outcomes in Stroke Patients – A Shared Team Approach Between Nurses and Doctors  
Health  
\$20,000

**G**

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**Gasworks Arts Inc**  
*www.gasworks.org.au*  
Block Party - A Feature Event of the Art of Difference Festival  
Arts, Culture and Heritage  
\$7,500

**Gateway Industries Inc**  
*www.gatewaycentre.com.au*  
Equipment Purchase: Combo 55/85 Chamber Shrink Wrapper  
Disability Care and Support  
\$6,000

**Geelong Performing Arts Centre**  
*www.gpac.org.au*  
Embers - Community Partnership with the CFA  
Community Support  
\$15,000

**Gippsland Disability Advocacy Inc**  
Gippsland Regional Advocacy Network Development (GRAND) Project  
Disability Care and Support  
\$40,000

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**H**

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**Heide Museum of Modern Art**  
*www.heide.com.au*  
Heide Collection, Conservation, Access and Strategy Project  
Arts, Culture and Heritage  
\$20,000  
(\$40,000 total commitment paid over two years in 2008 & 2009)

**Hillview Bunyip Aged Care Inc**  
*www.hillviewbunyip.org.au*  
Refurbishment of Laundry Area  
Aged Care  
\$8,000

**Human Rights Law Resource Centre**  
*www.hrlrc.org.au*  
Operational and Organisational Capacity Building Grant  
Community Support  
\$33,000  
(\$100,000 total commitment paid over three years in 2008, 2009 & 2010)

**I**

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**Islamic Women's Welfare Council of Victoria**  
*www.islamicwomenswelfare.org.au*  
Faith, Justice and Marriage: Challenges for Muslims in a New Country  
Community Support  
\$54,846

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**J**

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**Jewish Holocaust Centre**  
*www.jhc.org.au*  
Transforming Communities Through the Internet – Touching Lives who have Experienced Genocide and Trauma  
Arts, Culture and Heritage  
\$5,000

**Jewish Museum of Australia**  
*www.jewishmuseum.com.au*  
Learning at the Jewish Museum  
Education  
\$15,440

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**K**

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**Kage Physical Theatre Association Inc**  
*www.kage.com.au*  
The Sundowner Project (The Prelude)  
Arts, Culture and Heritage/Performing Arts  
\$10,000

**Kevin Heinz Garden Centre Inc**  
*www.kevinheinzgardencentre.com.au*  
Early Intervention Social Skills for Disadvantaged Youth  
Employment and Vocational Training  
\$9,000

**Koorie Heritage Trust Inc**  
*www.koorieheritagetrust.com*  
Aboriginal and Torres Strait Islander (ATSI) Community Philanthropy Partnership  
Community Support  
\$90,000

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**L**

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**La Trobe University**  
*www.latrobe.edu.au*  
The Use of E-Stim with People who have Dysphagia Associated with Parkinson's Disease: A Pilot Study  
Health  
\$30,000

**La Trobe University**[www.latrobe.edu.au](http://www.latrobe.edu.au)

Everyday-Angels: Piloting a Resource Kit to Foster and Reward Achievements in Aged Care Services in Victoria

Aged Care

\$35,008

**La Trobe University**[www.latrobe.edu.au](http://www.latrobe.edu.au)

How do Changes in Weather and Air Pollutants Affect Heart Disease in Melbourne?

Health

\$18,078

**Latrobe Community Health Service**[www.lchs.com.au](http://www.lchs.com.au)

Community Inclusion and Interpreter Support

Disability Care and Support

\$15,000

**Lorne Sculpture Exhibition Inc**[www.lornesculpture.com](http://www.lornesculpture.com)

2009 Lorne Sculpture Exhibition Education Program

Arts, Culture and Heritage

\$5,000

**Lucy Guerin Association Inc**[www.lucyguerin.com](http://www.lucyguerin.com)

Assistance towards final creation and presentation of 'Untrained'

Arts, Culture and Heritage

\$5,000

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**M**

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**Macpherson Smith Community Alliance**<http://msca.hmstrust.org.au>

A four-year Stage 2 joint partnership between Helen Macpherson Smith Trust and the State Government to enhance the Community Building Initiative (CBI) across rural and regional Victoria

Community Support

\$250,000

(\$1,000,000 total commitment paid over four years in 2007, 2008, 2009 & 2010)

**Macpherson Smith Rural Foundation**[www.msrf.org.au](http://www.msrf.org.au)

Capital Endowment Grant

Community Support

\$5,000,000

**Macpherson Smith Rural Foundation**[www.msrf.org.au](http://www.msrf.org.au)

Future Rural Leaders Scholarship Program

Community Support

\$750,000

**Malthouse Theatre**[www.malthousetheatre.com.au](http://www.malthousetheatre.com.au)

State of Play: a professional development & networking program for regional theatre makers

Arts, Culture and Heritage

\$15,000

**Mayflower Retirement Community**[www.mayflower.org.au](http://www.mayflower.org.au)

Upgrade of Essential Equipment

Aged Care

\$15,000

**Melbourne Business School**[www.mbs.edu](http://www.mbs.edu)

Endowment of the Helen Macpherson Smith Chair of Leadership for Social Impact

Community Support

\$500,000

(\$1,500,000 total commitment paid over two years in 2008 & 2009)

**Melbourne Fringe**[www.melbournefringe.com.au](http://www.melbournefringe.com.au)

REVERB – The First Dance Project

Arts, Culture and Heritage

\$10,000

**Melbourne International Film Festival**[www.melbournefilmfestival.com.au](http://www.melbournefilmfestival.com.au)

Accelerator - 4-day educational and skills development program as part of MIFF

Arts, Culture and Heritage

\$10,000

**Melbourne Writers Festival**[www.mwff.com.au](http://www.mwff.com.au)

MWF Schools' Program Regional Tour

Arts, Culture and Heritage

\$22,000

**Mercy Hospital For Women**[www.mercy.com.au](http://www.mercy.com.au)

Breastmilk Bank

Health

\$25,000

**Mildura Aboriginal Corporation**

Self Determination Plan

Community Support

\$41,000

**Moira Healthcare Alliance Inc**[www.moirahhealthcare.org.au](http://www.moirahhealthcare.org.au)

Moira Foodshare Program (Drought Assistance)

Community Support

\$13,500

**Monash Institute of Medical Research**[www.monashinstitute.org.au](http://www.monashinstitute.org.au)

Development of Novel Medical Therapies to Cure Ectopic Pregnancy

Health

\$36,000

**Monash University**[www.monash.edu.au](http://www.monash.edu.au)

New Drugs to Fight Superbugs

Health

\$13,000

**Monash University**[www.monash.edu.au](http://www.monash.edu.au)

Monash University Museum of Art at Caulfield

Arts, Culture and Heritage

\$100,000

(\$200,000 total commitment paid over two years in 2008 & 2009)

**Monash University**[www.monash.edu.au](http://www.monash.edu.au)

Computer Modelling to Investigate the Feasibility of Low-Cost Devices for Monitoring Daily Living in Elderly and Disabled People

Health

\$20,000

**Monash University**[www.monash.edu.au](http://www.monash.edu.au)

Fluid Lavage of Open Wounds (FLOW)

Health

\$36,500

**Monash University**[www.monash.edu.au](http://www.monash.edu.au)

Improving the Efficiency of Electricity and Water Use in Victoria

Environment

\$45,000

**Moreland Community Health Service Inc**[www.mchs.org.au](http://www.mchs.org.au)

Stewart Lodge Edible Garden Project

Community Support

\$8,960

### Murdoch Childrens Research Institute

[www.mcric.edu.au](http://www.mcric.edu.au)

The FaXeS Study - Offering Fragile X Carrier Testing to Women: Comparing Prenatal and Preconception Screening

Health

\$57,450

N

### National Ageing Research Institute Inc

[www.nari.unimelb.edu.au](http://www.nari.unimelb.edu.au)

Neurophysiological Processes Underlying Cognitive Function in Older People with Severe Dementia

Health

\$30,000

### National Disability Services – Victoria

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

National Disability Insurance Scheme (NDIS) - Community Education Coordinator

Disability Care and Support

\$50,000

### National Stroke Foundation (Australia)

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

Piloting a Community Education Program to Help Victorians be Strokesafe

Health

\$15,000

O

### O'Brien Institute

[www.bobim.org](http://www.bobim.org)

Leadership Fellowship: Director of the Victorian Centre of Excellence in Adult Stem Cell Medicine

Health

\$100,000

(\$300,000 total commitment paid over three years in 2009, 2010 & 2011)

### Onemda Association Inc

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

Extension and Alterations to Administration Building

Disability Care and Support

\$10,000

P

### P2: People and Parks Foundation

[www.peopleandparks.org](http://www.peopleandparks.org)

Caitlin's Retreat

Community Support

\$25,000

### Phunktional Limited

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

Calling the Shots: Developing a peer to peer health education resource for youth at risk

Arts, Culture and Heritage

\$28,800

### Prahran Mission

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

Hearing Voices Network – Victoria

Disability Care and Support

\$45,000

### Prince Henry's Institute

[www.princehenrys.org](http://www.princehenrys.org)

Male Susceptibility to Parkinson's Disease: A Role for SRY?

Health

\$39,310

Q

### Queen Victoria Women's Centre Trust

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

Women's Organisations Capacity Building Workshops and Kits 2009 – 2012

Community Support

\$35,000

(\$105,000 total commitment paid over three years in 2009, 2010 & 2010)

R

### Regional Arts Victoria

[www.rav.net.au](http://www.rav.net.au)

Children of the Black Skirt - Interactive

Arts, Culture and Heritage

\$32,060

### RMIT University

[www.rmit.edu.au](http://www.rmit.edu.au)

Is Fire a Friend or Foe of Our Native Victorian Orchids?

Environment

\$17,000

### Road Trauma Support Team Victoria

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

Support at the Time of Need

Community Support

\$23,220

### Royal District Nursing Service

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

2009 RDNS Master Class Series

Employment and Vocational Training

\$37,679

### Royal Society For The Prevention Of Cruelty To Animals

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

Discounted Pet Neutering Scheme

Community Support

\$27,000

### The Royal Society of Victoria Inc

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

Digitization of the Royal Society of Victoria Heritage Scientific Collection 1854 - 2009

Arts, Culture and Heritage

\$35,000

### Russian Welfare Society Inc

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

Fit Out of Newly-Completed Dementia Unit

Aged Care

\$20,000

S

### Samarinda Lodge Inc

Day Respite Program

Aged Care

\$20,000

### Scope (Vic) Ltd

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

Outcomes Project - Stage 2: Development of methods for measuring the outcomes and impacts of disability and inclusion services

Disability Care and Support

\$20,000

### Shepparton Villages

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

Thermaline Electric Tilting 'Bratt Pan'

Aged Care

\$30,000

### Sisters of Charity Community Care Limited

Briar Terrace Respite Care program

Community Support

\$14,184

### Somebody's Daughter Theatre Inc

[www.somebodysdaughtertheatre.com](http://www.somebodysdaughtertheatre.com)

Every Child, Every Chance

Education

\$20,000

### St Joseph's South Yarra Emergency Housing Association Inc

St Joseph's Crisis Shelters

Community Support

\$30,000



**St Paul's Drug Prevention,  
Rehabilitation and Aftercare  
Program**

Drug Prevention Program 2009  
Community Support

\$10,000

**Statewide Autistic Services Inc**

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

In-ground Trampoline and Shade  
Sail for new Children's Respite  
Facility

Disability Care and Support

\$16,989

**Stride Foundation Limited**

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

Mentoring Through Music -  
Robinvale

Education

\$25,000

**T**

**Taskforce Community Agency Inc**

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

Stepping uP Stepping Out (SUSO)

Community Support

\$30,000

**Teen Challenge Victoria Inc -  
Kyabram**

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

Refurbishment of Student  
Accommodation

Community Support

\$10,000

**The Torch Project**

[www.thetorch.asn.au](http://www.thetorch.asn.au)

RICognition 2009

Community Support

\$25,000

**The Torch Project**

[www.thetorch.asn.au](http://www.thetorch.asn.au)

Re-Igniting Community Victoria

Community Support

\$50,000

(\$100,000 total commitment paid over  
two years in 2008 & 2009)

**Trust For Nature (Victoria) -  
Melbourne**

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

Development and Implementation  
of a Covenantor Communication  
Strategy

Environment

\$20,000

**Turning Point Alcohol  
& Drug Centre**

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

Monitoring Harm Caused by  
Pharmaceutical Misuse

Health

\$25,600

**U**

**University of Ballarat**

[www.ballarat.edu.au](http://www.ballarat.edu.au)

Determining if the Y Chromosome  
Contributes to Prostate Cancer

Health

\$29,060

**University of Ballarat**

[www.ballarat.edu.au](http://www.ballarat.edu.au)

A Framework for Community  
Reasoning and Decision-Making  
on Water

Environment

\$50,000

**University of Ballarat**

[www.ballarat.edu.au](http://www.ballarat.edu.au)

Nurse-Led Mobility Clinics  
for Elderly in Low-Care Facilities  
at Ballarat Health Services

Health

\$35,036

**University of Ballarat**

[www.ballarat.edu.au](http://www.ballarat.edu.au)

Safe Operation of Farm Tractors

Health

\$50,000

**University Of Melbourne**

[www.unimelb.edu.au](http://www.unimelb.edu.au)

3D Digital Access Project – grant  
extension

Arts, Culture and Heritage

\$6,673

**University Of Melbourne**

[www.unimelb.edu.au](http://www.unimelb.edu.au)

Community Indicators Victoria  
– grant extension to undertake  
business plan

Community Support

\$20,000

**University Of Melbourne**

[www.unimelb.edu.au](http://www.unimelb.edu.au)

Green Room and Backstage Artist  
Facilities for new MTC Theatre

Arts, Culture and Heritage

\$100,000

**University Of Melbourne**

[www.unimelb.edu.au](http://www.unimelb.edu.au)

Dame Elisabeth Murdoch AC DBE  
Publication

Community Support

\$11,000

**University Of Melbourne**

[www.unimelb.edu.au](http://www.unimelb.edu.au)

Breast Cancer and Fertility:  
Contributing to General  
Practitioners' Management and  
Support of their Patients

Health

\$30,000

**V**

**Victoria University**

[www.vu.edu.au](http://www.vu.edu.au)

Does Bone Structure and  
Metabolism Play a Role in the  
Development of Diabetes?

Health

\$45,147

**Victorian Aboriginal Child Care  
Agency Co-operative Ltd**

[www.vacca.org](http://www.vacca.org)

Connecting the Dots

Arts, Culture and Heritage

\$15,000

**Victorian Animal Aid Trust**

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

Education and Administration  
Building

Community Support

\$5,000

**Victorian Council of Social  
Services**

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

Financial Literacy Training for  
Community Sector Organisations

Community Support

\$14,740

**Victorian Deaf Society**

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

HEAR here

Disability Care and Support

\$32,000

**Victorian Mental Illness Awareness  
Council**

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

Making Women's Safety in  
Victorian Public Inpatient Units a  
Reality

Disability Care and Support

\$25,000

### Victorian National Parks Association

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

Victoria Naturally  
Alliance Program

Environment

\$50,000

(\$125,000 total commitment paid over three years in 2008, 2009 & 2010)

### Victorian Opera

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

Victorian Youth Opera

Arts, Culture and Heritage

\$15,000

### Victorian Writers' Centre Inc

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

Writing@Rosebank - Fellowships  
for Victorian Writers

Arts, Culture and Heritage

\$15,000

### Victorian Youth Mentoring Alliance

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

Statewide Youth Mentoring  
Support

Community Support

\$120,000

### Villa Maria Society

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

My Future My Choice –  
establishment of Victoria's first  
home to help young people with  
complex medical needs due to  
significant acquired brain injury  
move out of aged care facilities

Disability Care and Support

\$25,000

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W

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### Western Edge Youth Arts Inc

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

Frolic – collaborative performance  
for young people from culturally  
diverse backgrounds

Arts, Culture and Heritage

\$5,000

### Westside Circus Inc

[www.westsidecircus.com](http://www.westsidecircus.com)

The Homecoming Project

Arts, Culture and Heritage

\$10,000

### Whitelion Inc

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

Whitelion Leadership  
Pathways Program

Community Support

\$25,000

### Wimmera Hearing Society Inc

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

Mobile Testing Unit

Disability Care and Support

\$10,000

### Windemere Child & Family Services Inc

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

Service Benchmarking Proposal  
Phase II: Refining and Testing  
Measures for Enhancing Quality  
and Cost Effectiveness in the  
Child Welfare Sector

Community Support

\$40,000

(\$80,000 total commitment paid over  
two years in 2008 & 2009)

### Women's Circus Limited

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

Joint Project between Women's  
Circus and Spectrum to treat  
Borderline Personality Disorder

Arts, Culture and Heritage

\$25,500

### Women's Health in the South East Inc

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

Strengthening the role of culturally  
and linguistically diverse (CALD)  
men within their families in the  
Australian context

Community Support

\$33,000

(\$100,000 total commitment paid over  
three years in 2008, 2009 & 2010)

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Y

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### Yooralla Society Of Victoria

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

Music to Improve Quality of  
Life for People with Aphasia

Disability Care and Support

\$15,000

### The Youth Junction Inc

[www.youthjunctioninc.net.au](http://www.youthjunctioninc.net.au)

Multi-Media Art Project (MAP)

Arts, Culture and Heritage

\$5,000

### Youth Substance Abuse Service

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

Collaborative Service Provision  
and Outcomes for Young People  
with Multiple and Complex  
Needs: Mapping Client and  
Carer Perspectives

Community Support

\$20,000

# Investments & Grants

## An historical perspective

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

The impact of this lasting legacy from Helen to the people of Victoria is exemplified in a summary of capital growth and grants over the now 57 years of the Trust's operations.

The value of the investment corpus is approximately \$76.6 million, as reflected in the following table:

### CORPUS INVESTMENT

YEAR ENDED JUNE	BOOK VALUE	MARKET VALUE
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	57,834
2004	57,873	65,123
2005	64,792	78,189
2006	69,230	90,947
2007	76,828	108,645
2008	83,138	96,889
2009	82,033	76,640

### 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
2005	20,484

YEAR ENDED	\$ 000's
2001	3,133
2002	4,192
2003	3,552
2004	5,286
2005	4,321
2006	4,649
2007	4,400
2008	5,725
2009	10,506
TOTAL GRANTS	80,213



# Financial Summary

## INCOME STATEMENT FOR THE YEAR ENDED 30 JUNE 2009

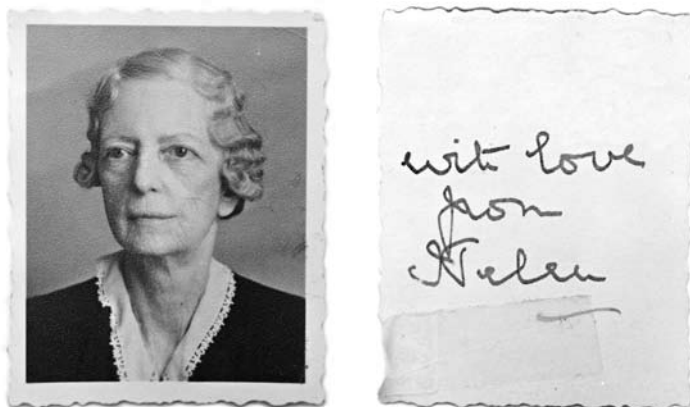
		2009 \$	2008 \$
REVENUE	Income from investments	9,692,454	12,528,783
TOTAL EXPENSES	1	(8,449,096)	(3,813,884)
OPERATING SURPLUS		1,243,358	8,714,899
GRANTS APPROVED DURING YEAR		10,505,964	(5,724,913)
SURPLUS FOR YEAR	Surplus for the year	(9,262,606)	2,989,986
	Attributable to Capital account 2	(6,059,817)	1,943,478
	Attributable to Income account	(3,202,789)	1,046,508

Note:

1. Total Expenses for the 2009 year include a provision for capital impairment losses on other financial assets of (\$7.1) million which do not relate to the administrative expenses of the Trust (2008 impairments losses to other financial assets (\$2.6) million).
2. Deficit on capital account comprises net realisable gains on disposal of investments of \$1.1 million, less the abovementioned capital impairment losses on other financial assets (2008 comprised \$4.6 million in realised capital gains).

# BALANCE SHEET AS AT 30 JUNE 2009

		2009 \$	2008 \$
ACCUMULATED FUNDS	Retained surpluses – capital	79,018,359	82,644,328
	Available for sale financial assets reserve	3,883,182	18,078,629
	Other reserves	–	5,636,636
		82,901,541	106,359,593
CURRENT ASSETS	Cash and cash equivalents	15,460,154	21,341,662
	Trade and other receivables	2,649,276	2,804,028
	TOTAL CURRENT ASSETS	18,109,430	24,145,690
NON-CURRENT ASSETS	Other financial assets	68,690,502	88,253,664
	Office furniture & equipment	29,024	33,554
	Leasehold improvements	2,587	–
	Computer equipment	4,745	8,226
	Artwork	7,260	7,260
	TOTAL NON-CURRENT ASSETS	68,734,118	88,302,704
TOTAL ASSETS		86,843,548	112,448,394
CURRENT LIABILITIES	Trade & other payables	3,942,007	6,088,800
	Non-current liabilities	–	–
	Other payables	–	–
TOTAL LIABILITIES		3,942,007	6,088,800
NET ASSETS	Held for:		
	Corpus - Investments	76,638,796	96,888,636
	Other	43,616	49,040
	Income	6,219,129	9,519,998
NET ASSETS		82,901,541	106,359,594



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



**GRAPHIC DESIGN**  
*letterbox.net.au*

**PHOTOGRAPHY**  
Photos of Trustees and staff /  
Dale Mann

**COVER IMAGE**  
Human iPS Cell Colony Stained.  
Photo courtesy O'Brien Institute

