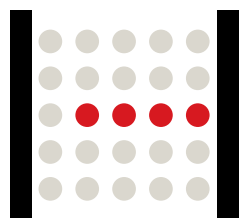
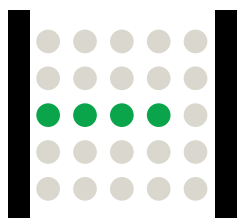
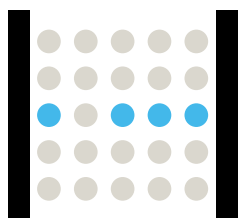
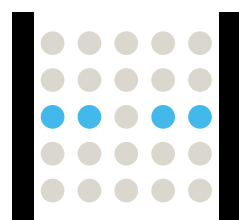
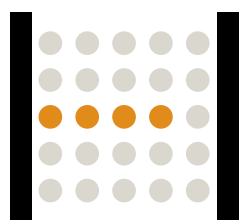
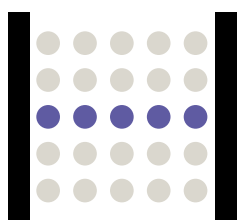
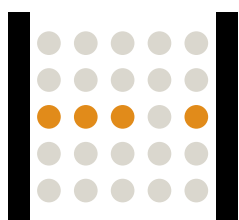
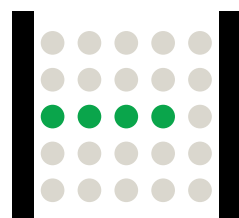
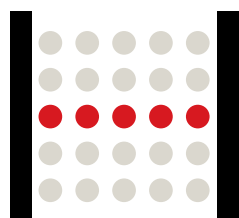
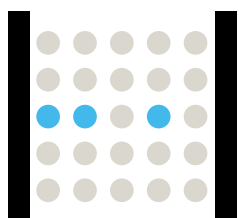
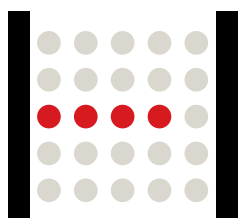
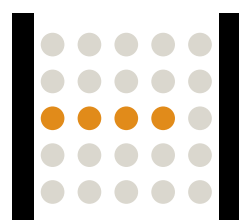
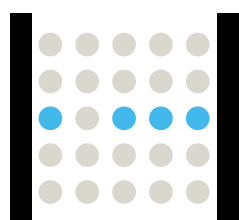
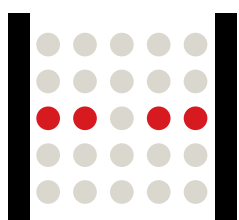
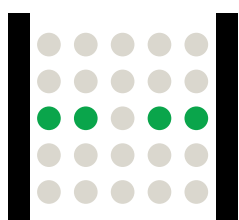


# Helen Macpherson Smith Trust

*Annual Report 2013*



HELEN MACPHERSON SMITH TRUST is an independent perpetual philanthropic trust established by Helen Macpherson Schutt (*née Smith*) in 1951. Almost \$100 million has been distributed in grants since the Trust was established, with a wide range of Victorian charitable institutions and a diverse range of projects benefitting every year.

**VISION**

A strong, just and sustainable Victoria.

**MISSION**

Help build fair, creative and resilient Victorian communities through initiatives that promote positive change.

**VALUES**

Respect  
Integrity  
Stewardship  
Collaboration  
Accountability

**STRATEGIC AIMS**

Building  
Enabling  
Leading



2	Helen Macpherson Smith: A remarkable woman of her time
3	Chairman's report
4	Chief Executive's report
8	2013 case studies
16	2013 grants
19	Strategic aims at work
26	Investments and grants: an historical perspective
27	Investment review
28	Financial summary

#### TRUSTEES

Darvell M Hutchinson AM  
*Chairman*  
Frances Awcock AM  
The Hon Rod Kemp  
Winsome McCaughey  
Dr Philip Moors AO  
Keith Smith

#### STAFF

Lin Bender AM  
*Chief Executive  
(Formerly Grants  
Executive)*  
Peter Wetherall  
*Investment Executive*  
Glen Thomson  
*Finance Executive*  
Dianne Street  
*Accountant and  
Administrator*  
Michelle Springall  
*Executive Assistant  
and Project Officer*

#### INVESTMENT COMMITTEE

Darvell M Hutchinson AM  
*Chairman*  
The Hon Rod Kemp  
Dr Philip Moors AO  
Thomas Cameron  
Richard Sinclair  
Lin Bender AM  
Peter Wetherall

#### BANKERS

National Australia Bank

#### LEGAL ADVISERS

Herbert Smith Freehills

#### AUDITORS

BDO

#### CONTACT INFORMATION

27 Windsor Place  
Melbourne Vic 3000  
Australia

T (+61 3) 8370 2699  
E [info@hmstrust.org.au](mailto:info@hmstrust.org.au)

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

We extend our appreciation to former staff members  
Andrew Brookes *Chief Executive*  
Anthony Baird *Investment Executive*  
and Darren McConnell *Finance Executive*  
for their valuable contributions to the work of the Trust.

# Helen Macpherson Smith

A remarkable woman of her time.



Helen Macpherson Smith was a remarkable woman of her time. Born in 1874 into a Scottish-Australian family which had prospered from the land and commerce, Helen lived comfortably in Melbourne and later in Europe.

Unlike many daughters of well-to-do families, Helen avoided appearances in the society press and was strongly influenced by her hardworking and tightly-knit clan. She was an enlightened woman who could look beyond her own family and social circle, who could see opportunities to make a contribution to the community and who pursued them without fuss or fanfare.

At that time, Australian women's philanthropy focused on voluntary work, as large-scale giving was seen as the province of men. Helen was no stranger to such generosity as her grandfather, John Macpherson, gave willingly to public appeals including the new Scots Church in Collins Street Melbourne and the Fitzroy Free Public Library.

Helen continued her family tradition and became a life-long donor and supporter of organisations in Victoria including medical institutions, community service charities and children's causes.

She married barrister William Schutt in 1901 when she was 27. While William became Justice Schutt and gained an increasingly high public profile, Helen lived a quieter life, focusing on her charitable interests and continuing to support causes in which she believed.

The couple had no children, and spent 22 years of their married life in Melbourne. By the time she was 40, both Helen's parents had died and, as an only child, she inherited assets worth £57,795.

In 1923, she left for Europe while William remained based in Melbourne. The couple travelled widely overseas together, particularly after William's retirement in 1926 from the Supreme Court of Victoria. He died in 1933, aged 65, after an accident on board ship when returning to Australia from one of his trips abroad with Helen.

Helen continued to live in Europe, and was resident at the Hotel Majestic in Cannes on the French Riviera when she contracted pneumonia and died on 19 April 1951.

She left £275,000, the majority of her considerable wealth, to establish a perpetual philanthropic trust to benefit Victorian charitable institutions.

Helen's acute understanding of the long-term benefits of philanthropy was never more apparent than in her Will, in which she instructed her trustees to accumulate the major portion of the Trust's income for 21 years. By 1972, her original bequest had grown to \$3.95 million, providing a much stronger base from which larger and more effective grants could be made in perpetuity.

By 2013, a little over 40 years later, the net value of funds was nearly \$100 million, and almost \$100 million had been distributed in grants.

Helen was undoubtedly a philanthropic leader amongst women of her time. She left a financial legacy which has enabled HMSTrust to fund many initiatives for a diverse range of charitable organisations. The impact on Victorian communities is significant and far reaching.

HMSTrust celebrates Helen's wisdom and vision in the Trust's new strategic aims: Building, Enabling, Leading.

# Chairman's report

The 2013 financial year has been a year of significant review, growth and change at the Helen Macpherson Smith Trust.

## Review

The major review undertaken this year by trustees was designed to lead to a new, sharply focused and more balanced era of grant making, including an emphasis on lead grants to achieve comprehensive social impacts.

Grants approved since the Trust was established in 1951 are now nearing \$100 million. However, in recent years, the Trust has experienced steady increases in grant applications with total requests far beyond our financial capability. This resulted in valuable time being expended but wasted both by dedicated grant seekers and then by our grants team.

We have now focused on specified strategic aims and developed a new process framework for executing our grants program. We believe this review will accord with Helen's philanthropic roadmap in perpetuity for the benefit of charitable institutions in Victoria.

## Growth

The year saw solid growth in the net worth of the Trust, in keeping with the upward sharemarket trend. Net worth of \$96 million at 30 June 2013 compares very favourably with \$84 million at the previous year end. Despite lower interest rates being derived during the year, total revenue was slightly higher than last year, while total expenses were 10 per cent lower. Details of these figures are set out in the Financial Summary of this Annual Report and in the Investment Review.

Grants approved for the 2013 financial year totalled \$3.16 million, lower than normal, due to the review process. There was a significantly higher number of smaller grants which, although modest in financial terms, are often life changing for the organisations which receive them. A full list of grants made this financial year may be found on pages 16 to 18. The Trust's capacity to maintain its level of annual distribution is dependent on judicious investment management and the rigorous governance of our Investment Committee, and I extend my appreciation to the committee members. Helen Macpherson Smith Trust has always managed its investments in-house, a policy which provides stability and continuity, and which has certainly stood the test of time.

## Change

There were senior changes to 'Madam's Team' during the year. We farewelled Tony Baird in December 2012, after seven years of astute

management of the Trust's investment portfolio, particularly through the turbulent global financial crisis. Peter Wetherall joined us in the role of Investment Executive in May, following a successful 32-year career in stockbroking and funds management.

In May 2013, our Chief Executive Andrew Brookes resigned. Andrew ably steered the Trust's move from our leased premises at 80 Collins Street into our new home at Windsor Place. We recognise Andrew's contribution to the Trust, his meticulous attention to governance and process, and his work in commencing our strategic review.

Lin Bender, formerly our Grants Executive, was appointed to the role of Chief Executive in October 2013. Her extensive career in the not-for-profit sector and her proven commitment to upholding Helen's legacy made her eminently suitable to guide the Trust under our new strategic aims: Building, Enabling, Leading.

## Staff and trustees

I acknowledge the contribution of all the Trust's staff who have worked tirelessly during the year to maximise the return of every dollar invested and the impact of every dollar granted.

I thank all trustees for their dedicated and enthusiastic contributions throughout the year. In particular, Philip Moors and Fran Awcock who joined me in assisting the staff during the transition period while we recruited a new Chief Executive.

## Outlook

The economic and investment environment for the year ahead appears less difficult to predict than last year. However, it is unlikely the high capital growth enjoyed this financial year will be sustained. Total revenue is more likely to plateau as dividend payout ratios come under stress and interest rates remain low.

Trustees confidently await the initial outcomes of our new grant making strategy. We believe our Community and Social Impact Grants will facilitate projects that accurately reflect the Trust's current areas of giving and honour the spirit and generosity of our benefactress.

Darvell M Hutchinson AM  
Chairman

# Chief Executive's report

"Grant makers and grant seekers both require a clear focus, a readiness to change, a strategic plan mapped by sound objectives and a committed team with the skills to deliver meaningful outcomes."

I write this report one month into my new role as Chief Executive of the Helen Macpherson Smith Trust, a position I am already finding immensely stimulating and rewarding. For the past 14 months, as Grants Executive of the Trust, I had the privilege of managing the Trust's grants program and working alongside our trustees on a major review of our corporate strategy and restructure of the grants program.

Coming from previous executive roles at the receiving end of the funding continuum has provided the benefit of first-hand experience of the financial challenges that confront not-for-profit organisations. Philanthropy has always been a critical part of the funding mix but, as needs increase, so do the number and frequency of requests for philanthropic funds.

It seems clear that grant makers and grant seekers must start from a common point if the philanthropy process is to work effectively and efficiently. Grant makers and grant seekers both require a clear focus, a readiness to change, a strategic plan mapped by sound objectives and a committed team with the skills to deliver meaningful outcomes.

Grant seekers need to understand and match a funder's assessment criteria. So as a grant maker we have a responsibility to ensure clarity and transparency about why, what, when and how we fund. This is a key reason for undertaking the major review of our corporate strategy and grants program.

These changes have taken courage, time and commitment. The decision of our trustees to omit the November 2013 grants round enabled this process to be completed in a considered and timely way.

The groundwork has now been done, the new grants structure is in place, our new website will go live in December and we are on track to open our first online applications on 1 February 2014.

## Our new grants structure

The new grants structure is designed to encourage grant seekers to be more strategic in their applications, and to enable the Trust to better assess applications against funding criteria, track outcomes against objectives and build data that will help inform future program and funding directions.

A simple grants matrix has been developed to help applicants match their project's objectives against those of the Trust. The stronger the match, the greater the chance of success. While our programs and objectives have been refined to ensure they are relevant and effective in a rapidly changing world, they remain true to the Trust's long-established funding philosophy. The new grants matrix is therefore very relevant to the 11 case studies which were funded under our former grants programs and chosen for this Annual Report.

## Case studies that tick the right boxes

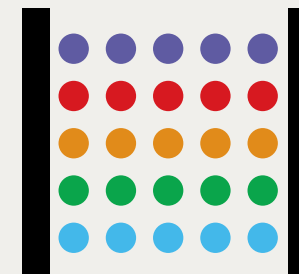
These case studies provide a valuable insight into the projects that successfully matched three or more of the Trust's objectives. Eight of the case studies (on pages 8 to 15) represent grants made in 2013 and three are grants from previous years (on pages 20 to 25). These three earlier grants highlight the need to allow time for outcomes to be realised, as all projects have achieved long-term social impacts over different timeframes and in different ways.

In 2008, the Trust granted \$5.75 million to help build the capacity of rural and regional Victoria through the establishment of the Macpherson Smith Rural Foundation (MSRF). The goal was an independent, regional-based entity to fulfil the Trust's vision of a thriving, confident rural Victoria driven by inspiring leaders. MSRF has a focus on developing young rural leaders by improving rural educational opportunities, particularly transition to tertiary education and mentoring, and in 2012 was granted a further \$625,000 to expand its operating resources.

Victorian Mental Illness Awareness Council received a relatively modest grant of \$25,000 in 2008 to fund a report on women's safety in Victorian public inpatient units. The report was released in May 2013, quickly resulting in major media attention and constructive dialogue with government on how to implement the report's recommendations.

In 2010, \$1 million was granted to Sustainable Gardening Australia over three years to establish communal gardens in bushfire affected areas. The project has already helped with emotional and environmental healing, and with restoring the 'social glue' so essential to small communities. It will continue to deliver long-term benefits for these communities.

The Trust is very proud to have enabled these projects, which have been significant catalysts for improvement and change in three very different areas of need.



The front cover of this Annual Report features our graphic interpretation of the grants matrix. This simple colour-coded icon will feature in every future case study alongside the list of matched objectives.

## 2013 grants

During the 2013 financial year, we received 274 applications of which the trustees approved 88. Grants totalling \$3,159,240 were awarded. Thirty-eight grants were approved for Rural and Regional Victoria projects, 40 in Education and Vocational Training, six in Arts and Culture and four in Land Stewardship.

The Trust's commitment to rural and regional Victoria and to education, training and leadership is strongly reflected in the number of grants approved in these areas. This year's grants ranged in amount from \$3,600 awarded to The Tree Project for the production of a Species Selection Guide, to \$286,800 to the Victorian Association for the Care and Resettlement of Offenders for a court-based family support project in the Barwon region.

Projects were equally diverse, ranging from the establishment of a hydroponic social enterprise by Community College Gippsland to a children's community publishing project by Kids' Own Publishing in Cockatoo.

Technology-driven projects were also successful: a digital reach project for the Cancer Council Training and Resource Centre, a controlled trial to test the effectiveness of an inspiring mobile application called TOBY Playpad developed by Deakin University for early intervention in autism, and the establishment of a digital Cultural Conservation Channel by the Centre for Cultural Materials Conservation at the University of Melbourne.

The Trust remains committed to maintaining a minimum of 30% of funding for smaller grants under \$25,000, and this year funded 69 Small Grants for a total of \$1,254,685. These modest grants represent critical funding that enables organisations to deliver essential community services. This commitment saw \$19,026 granted to St John Ambulance to purchase new UHF radios for vehicles used by first aid volunteers in regional and rural Victoria, and \$24,000 to Realise Enterprises in Warrnambool for a walk-in fridge for their growing social enterprise which trains and engages people with a disability.



**The HMSTrust team**

2013 has been a year of consolidation fuelled by a shared vision for embracing our new era of grant making. I acknowledge the role of my predecessor, Andrew Brookes, who guided the initial strategic review, and I thank our trustees and staff who have all been active and enthusiastic participants in the process. Together, we sharpened our philanthropic focus, starting with our vision, mission, values and strategic aims, and ensured they underpinned every aspect of the Trust’s work from investment and finance to grant making.

Our Executive team is now complete with Glen Thomson joining the Trust in October 2013 as Finance Executive. Glen is a chartered accountant with extensive experience in the funds management industry, and we welcome him to his new role. The Executive team represents the Trust’s three core activities: in addition to my CEO duties I am responsible for the grants program, Glen Thomson is responsible for finance and Peter Wetherall for investment. We all share the Trust’s core values and a commitment to delivering on the vision for a strong, just and sustainable Victoria.

**Honouring the past, celebrating the present and embracing the future**  
Helen Macpherson Smith was indeed a remarkable woman. The Trust’s vision, mission, values and grants program continue to reflect Helen’s wishes, so carefully articulated in her Will. It is therefore appropriate that the Trust’s new logo features Helen centre stage.

**New logo**

The grants matrix itself has inspired a new interpretation of the Trust’s logo. Helen’s signature is a bridge between the two pillars of the grants matrix, forming a distinctive ‘H’. So her guiding hand is thus central to our core identity as we launch our new grants structure and newly designed website.



Helen Macpherson Smith Trust

2014 will be a landmark year for the Trust. We celebrate two milestone events: the 50-year stewardship of our visionary Chairman, Darvell Hutchinson and, by June, the distribution of more than \$100 million in grants to projects that have benefited hundreds of communities across Victoria. Last but certainly not least, I thank our trustees for their support and confidence in me as a new guardian of Helen’s legacy, and I extend special thanks to our talented and committed staff.

I look forward to a year of collaboration across the sector to expand the impact of philanthropy in Victoria.



Lin Bender AM  
Chief Executive

**Trustees**



Darvell M Hutchinson AM  
Chairman of Trustees



Frances Awcock AM



The Hon Rod Kemp



Winsome McCaughey



Dr Philip Moors AO



Keith Smith

**Staff**



Lin Bender AM  
Chief Executive



Peter Wetherall  
Investment Executive



Glen Thomson  
Finance Executive



Michelle Springall  
Executive Assistant  
and Project Officer



Dianne Street  
Accountant and  
Administrator

St John Ambulance Australia (Vic) Ltd

<b>Project</b> UHF radios for first aid volunteer vehicles in regional and rural Victoria	<b>Amount</b> \$19,026	<b>www</b> stjohnvic.com.au	<b>Program</b> Rural and Regional Victoria <small>Under our new grants structure, Rural and Regional Victoria is now Regional Resilience.</small>
--	---------------------------	--------------------------------	---

TRUST OBJECTIVES	PROJECT OBJECTIVES	
<b>Rural and regional Victoria</b>	Provide first aid emergency services to communities across rural and regional Victoria.	
<b>Building capacity</b>	UHF radios enable essential communication for rapid response to natural disasters and at community events.	
<b>Extending opportunity</b>	Protect the rights of remote communities to quality first aid services.	

St John volunteers come in loud and clear on new UHF radios

The St John Ambulance has been a vital feature of the Victorian landscape for more than 125 years. Victoria’s leading first aid training organisation, it has a large force of qualified and trained volunteers providing first aid and support to communities across the state. St John had its own emergency in January 2013, when a change in government channel allocations meant existing UHF radios in volunteers’ vehicles could not access the new channels.



IMAGE A new lifeline for volunteers.

St John Ambulance volunteers play a vital role in emergencies throughout the state, providing a rapid response to local communities when natural disasters strike. About 30 of its 70 divisions are now located in regional and rural Victoria, where they’re also a familiar sight at thousands of community events each year. Radio communications are key both to the safety of volunteers and to the contact between St John Ambulance units and other emergency services. New equipment is particularly important to volunteers in the country, as communication outages are common when natural disasters strike. But when changes were announced to government channel allocations from January 2013, the ambulance service faced a bill of more than \$73,000 to update radios which could no longer access the new channels.

**PROJECT AIMS**  
Purchase UHF radios for first aid vehicles operating in regional Victoria to:

- > Allow access to the new communication channels
- > Overcome communication outages
- > Facilitate contact between units and other emergency services
- > Ensure smooth coordination of services at community events.

Marketing, Communications and Development Manager, Martin Wells, says St John Ambulance faced a “show stopper” over the radios ceasing to work. “*The Trust provided funding which saved the day,*” he says.

The radios, which are now installed and working smoothly, also provide a lifeline to St John’s command and control structure.

The communications re-equipment has been completed with the rolling out of new mobile first aid posts, which include hand-held devices for volunteers working at a distance from their post.

Helping Hoops Inc

<b>Project</b> Helping Hoops Inc	<b>Amount</b> \$8,500	<b>www</b> helpinghoops.com.au	<b>Program</b> Education and Vocational Training <small>Under our new grants structure, Education and Vocational Training is now Education and Vocational Pathways.</small>
-------------------------------------	--------------------------	-----------------------------------	---

TRUST OBJECTIVES	PROJECT OBJECTIVES	
<b>Building capacity</b>	Engage and retain migrant and refugee children and youth in education. Connect their families to welfare and community programs and develop social networks.	
<b>Extending opportunity</b>	Provide free access to a structured social and support network for disadvantaged youth and their families.	
<b>Collaboration and partnership</b>	Establish partnerships with local government, police and other organisations.	

Vulnerable kids get right on the ball with Helping Hoops

Operating with a tiny budget, a large amount of goodwill and very effective partnerships, the independent Melbourne charity Helping Hoops operates a free weekly basketball program for refugee children at the Atherton Gardens public housing estate in Fitzroy. Basketball skills are taught in a fun atmosphere, and the program helps develop a range of life skills and connections for vulnerable children and their families.



IMAGE Helping Hoops in action at the Atherton Gardens public housing estate.

While Helping Hoops Inc has been running free weekly indoor basketball programs for disadvantaged children since 2010, the Helping Hoops Fitzroy project was the first to be established outdoors on a public housing estate. “*We were invited to launch the program by the Fitzroy Police Youth Resource Officers,*” says Helping Hoops Executive Director Adam McKay. “*The challenges of this open housing estate were big, but the potential was also incredibly exciting.*”

A former professional basketball player and fully accredited coach was appointed to run two one-hour sessions each week, assisted by up to four Fitzroy police and elders of the African-Australian community.

**PROJECT AIMS**  
In addition to developing basketball skills in children aged eight to 15, aims were to:

- > Build self-esteem
- > Develop leadership, discipline and teamwork skills
- > Teach respect of self, team mates and officials
- > Build trust
- > Promote social inclusion
- > Provide exercise and promote an active lifestyle.

Regular contact with the core group of around 20 children means Helping Hoops has become a positive influence on and off the basketball court, and ensures children’s and families’ needs are being met in welfare, social services and education.

Other key outcomes include staging a Helping Hoops Fitzroy Tournament, attendance at Melbourne Tigers basketball games, reducing cultural resistance to girls’ participation in sports and a new collaboration with an arts program so children can create personal artworks on their basketball court.

Helping Hoops Fitzroy has provided a template for expansion into other public housing estates, with Richmond already established and programs planned for Collingwood and Flemington.



Park Lane Nursery

<b>Project</b>	<b>Amount</b>	<b>www</b>	<b>Program</b>
Shadehouse renewal project	\$24,590	<a href="http://parklanenursery.com.au">parklanenursery.com.au</a>	Rural and Regional Victoria <small>Under our new grants structure, Rural and Regional Victoria is now Regional Resilience.</small>

TRUST OBJECTIVES	PROJECT OBJECTIVES
<b>Rural and regional Victoria</b>	Australian Disability Enterprise based in Wangaratta.
<b>Building capacity</b>	Build the capacity of the nursery to increase its current annual production of 300,000 native tubestock.
<b>Extending opportunity</b>	Expand shadehouse project to increase training and employment opportunities for people with a disability.
<b>Collaboration and partnership</b>	Partnerships developed with local organisations including the Community Work Crew from the Beechworth Community Facility and local building suppliers.



Reconstruction of shadehouse the highest priority of infrastructure requirements

Park Lane Nursery is a highly successful social enterprise of North East Training and Employment Inc (NETE), a not-for-profit disability enterprise which provides employment, training and social inclusion opportunities for people with disabilities.



IMAGE Room to grow in the new shadehouse.

Since its establishment 21 years ago, the nursery has trained and employed about 70 people. It also has lifestyle programs, including customer contact in the retail nursery, for those with higher needs. Operating from leased premises on a 3ha site in Wangaratta, Park Lane Nursery has long-established clients in the commercial revegetation markets, with many large forward contracts in place. The retail nursery also caters for smaller individuals and organisations.

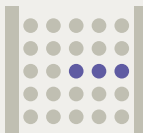
A 2012 strategic plan identified infrastructure upgrades and investment as essential to the nursery’s continuing success. Reconstruction and relocation of a large 18-year-old shadehouse would also provide space for retail expansion, another initiative identified in the plan. “The nursery has grown in fits and starts,” says Park Lane Nursery CEO, Scott Grant. “One of the issues identified was the need for workflow management. By relocating and rebuilding the shadehouse we have achieved a really cohesive flow between our operations shed, the poly houses and the shadehouses right next door.”

- PROJECT AIMS
- > Salvage much of the steel and relocate 40m
  - > Attract generous discounts from local suppliers for new materials
  - > Arrange volunteers to undertake appropriate work
  - > Include new concrete paths, multi-function benches and a new irrigation system
  - > Involve other community groups, such as the community work crew from the Beechworth Correctional Facility.

Victoria University

<b>Project</b>	<b>Amount</b>	<b>www</b>	<b>Program</b>
Harvester Technical College and disadvantaged students	\$100,000	<a href="http://vu.edu.au">vu.edu.au</a>	Education and Vocational Training <small>Under our new grants structure, Education and Vocational Training is now Education and Vocational Pathways.</small>

TRUST OBJECTIVES	PROJECT OBJECTIVES
<b>Building capacity</b>	Support upwards of 200 Year 10 and 11 disadvantaged Harvester Technical College students to stay engaged and complete their course.
<b>Extending opportunity</b>	VU students support younger, disadvantaged Harvester students. Regular breakfasts, mentorship, employment advice and social contact.
<b>Collaboration and partnership</b>	Partnerships developed with Visy Cares Hub, Kellogg’s Vic Relief, Second Bite and Brimbank Local Learning and Employment Network.



New Youth Work Centre improves education and employment outcomes for disadvantaged youth

Harvester Technical College delivers VCAL (Victorian Certificate of Applied Learning) and VET (Vocational Education and Training) programs to many disadvantaged western suburbs students who are at risk of failing to complete their basic education. Established by the western region’s Victoria University (VU) and supported by university student mentors, the new Harvester Youth Work Centre encourages students to improve their education outcomes, community connections and employment opportunities.



IMAGE Role models and mentoring are key to the project.

Completion of basic education is essential if disadvantaged young students are to achieve further education success, improve their community connections, develop personal skills and ultimately find employment. Believed to be the first model of its kind, the Harvester Youth Work Centre brings together a range of competing needs in a win-win situation, according to Victoria University (VU) Associate Professor Robyn Broadbent, who coordinates VU degrees in youth work and youth service management. “We have western suburbs young people moving through their university degrees who need experience and practical work, while Harvester College has a diversity of young people who can really benefit in education from role models, mentors and extra programs,” she says.

The project includes development of a student representative council, a student action team to coordinate programs including a breakfast club, weekly lunch day, cooking, health and nutrition programs for all year 10 and 11 students plus weekly employment assistance. Students participate in leadership programs, health and wellbeing workshops, a community project pilot and outdoor activities.

- PROJECT AIMS
- > 70% student participation in 2013
  - > 80% of Harvester students connected with a VU student
  - > A Youth Work kit to enable development of a sustainable, replicable project
  - > Connect the college to other education resources and community services
  - > Equip students to cope with a range of educational barriers
  - > Ensure all students start the day with breakfast (20% currently don’t).
- The project may well have a wider impact, with a national alternative education program already interested in developing a similar model with VU.



**Project**  
New Aboriginal Filmmaker Training Production Initiative 2013

**Amount**  
\$25,000

**www**  
openchannel.org.au

**Program**  
Education and Vocational Training  
Under our new grants structure, Education and Vocational Training is now Education and Vocational Pathways.

TRUST OBJECTIVES	PROJECT OBJECTIVES	
Rural and regional Victoria	Train Aboriginal filmmakers from regional Victoria.	
Indigenous Victoria	Experienced professional Indigenous filmmakers work with new Indigenous filmmakers resulting in the production of six 15-minute films around cultural themes.	
Building capacity	4-month course leads to Certificate III in Media qualification.	
Extending opportunity	Deliver an otherwise unattainable opportunity for screening on national SBS NITV and at the St Kilda Film Festival.	
Collaboration and partnership	Partners include Koorie Heritage Trust, SBS TV and Victorian Government's Higher Education and Skills Group.	

New Aboriginal filmmakers trained for production of short films for SBS NITV

A new core of Indigenous filmmakers is being built in Victoria through the 2013 relaunch of the New Aboriginal Filmmaker Training Production program. It is an initiative of Open Channel, a not-for-profit film and television organisation which supports emerging filmmakers. First piloted in 2009, the program is being conducted by established Aboriginal filmmakers. Around a dozen new students in Victorian regional areas are being trained in a range of production skills as they create six 15-minute films for national broadcast on SBS NITV in 2014.



IMAGE  
Students in the Indigenous filmmaking course.

The program will bring to life a diversity of stories, including the Aboriginal Advancement League, reconnecting with storylines and language revival (there are between 20 and 30 language groups in Victoria).

A core group of six students is being trained, but around a dozen participants are learning a range of production skills. The program includes weekend workshops, regional and online training delivery and production support, with cultural support for story development provided by the Koorie Heritage Trust.

- PROJECT AIMS
- > Facilitate broad cultural understanding between Aboriginal and non-Aboriginal people
  - > Provide an important cultural voice to Victorian Aboriginal communities
  - > Develop a new core of Aboriginal filmmakers
  - > Produce six films for SBS/NITV
  - > Engage learners and embed complex screen production skills
  - > Offer a nationally-recognised Certificate III in Media qualification.

The Trust funding, together with a new mobile training unit, have been critical in facilitating filming in regional communities, says Open Channel's Training Manager, Daniel Schultheis.

*"This is really very significant. Many Aboriginal stories we see in Australia have come from other states such as the Northern Territory and Queensland, where there is a bigger pool of filmmakers. A lot of Victorian stories have not been told yet,"* Mr Schultheis says.

While the shortage of appropriate Aboriginal trainers in Victoria has required experienced Indigenous filmmakers to be flown in from interstate, a long-term goal of the project is to develop local practitioners who can also become trainers.

**Project**  
ANAM Health and Wellbeing Project

**Amount**  
\$94,500 over three years

**www**  
anam.com.au

**Program**  
Arts and Culture  
Under our new grants structure, Arts and Culture is now Culture and Heritage

TRUST OBJECTIVES	PROJECT OBJECTIVES	
Building capacity	Introduce an innovative new Health and Wellbeing Program for elite music students focusing on the prevention and management of work-related stress, anxiety and injuries.	
Extending opportunity	Protect the rights of musicians to an injury-free career.	
Collaboration and partnership	Partnership and collaboration with the Australian Ballet School, Australian Institute of Sport, National Tennis Academy and University of Melbourne.	

An Australian first in music education aims to transform music practice in orchestras

Musicians' mental and physical health has been largely ignored in training and professional performance music sectors, where a culture of silence and 'turning a blind eye' to injury and mental health issues has prevailed. The Australian National Academy of Music (ANAM), Australia's national centre for the development of exceptional young musicians, has launched an innovative Health and Wellbeing Program designed to change the culture of the music sector. ANAM is the only institute of its kind in Australia, and one of few in the world.



IMAGE  
Alexander Technique practitioner Penny McDonald working with ANAM cellist Jack Bailey. Photograph: Pia Johnson

There is an acute need for attention to the physical and mental wellbeing of musicians across the world, and ANAM's investment in this area is an international 'game changer', says ANAM's Artistic Director, Paul Dean.

*"We're extremely proud to be partnering with the Trust to develop and deliver Australia's first Health and Wellbeing Program for musicians. It has already brought about positive change in its launch year,"* Mr Dean says.

Following intensive sessions with a range of highly-regarded professional practitioners, the Academy's 68 students have gained a greater understanding of the physical and emotional demands of their craft, how to produce sound at their top potential while lessening injuries, and how to better manage their health and performance anxiety.

Formal feedback has ranged from *"this has changed the way I play my instrument"* to *"you can't learn this anywhere else"*, according to ANAM's Business Manager, Charlotte Cassidy.

- PROJECT AIMS
- The program:
- > Is instrument-specific for each student
  - > Deals with the preparation and ongoing care of the musician's mind and body
  - > Educates students about injury prevention
  - > Advises on various tools to deal with pain, injury and performance anxiety (to date most commonly managed by drugs).

Content includes practices such as Pilates, yoga, meditation, Feldenkrais and the Alexander Technique. Other sessions involve a specialist classical music physiotherapist, discussion around the issues of beta-blockers and performance anxiety, and two psychologists on maximising performance potential and managing anxiety.

ANAM plans to share its program with other institutions and the professional performance sector, and may generate revenue through the sale of IP and delivery mechanisms.

Project	Amount	www	Program
Navigating a New Path	\$151,292 over two years	stkildagatehouse.org.au	Education and Vocational Training <small>Under our new grants structure, Education and Vocational Training is now Education and Vocational Pathways.</small>

TRUST OBJECTIVES	PROJECT OBJECTIVES	
Building capacity	Assist young women aged 13 to 24 years transition out of street sex work through an intensive outreach and mentoring program.	
Extending opportunity	Offers a pathway to a safe and stable life through the coordination of health services, accommodation, education and ultimately employment.	
Collaboration and partnership	Partnership established with Whitelion, and collaboration with organisations including Open Family Australia, Victoria Police, St Kilda Youth Services and DHS Youth Services.	

Helping young women break away from street sex work, drug addiction and homelessness

St Kilda Gatehouse is a safe haven that offers street sex workers services including emergency aid, advocacy, counselling and transitional care. Navigating a New Path (NANP) uses intensive case management to assist young women aged 13 to 24 break out of the traps caused by trauma, homelessness and drug addiction that can lead to street sex work. Many have experienced statutory care, and enter street sex work as a way of meeting their basic survival needs as they transition to independence.



IMAGE  
Intensive mentoring providing an effective approach.

Launched in April 2012 as a partnership between St Kilda Gatehouse and Whitelion, NANP uses intensive outreach work and mentor support to engage with vulnerable young women and connect them with social services and their local community.

While the project originally focused on the St Kilda area, further research revealed greater needs around Fitzroy public housing, Dandenong and Footscray. It also became clear that at-risk teenagers as young as 13 should be targeted.

PROJECT AIMS

- > Reducing young women’s involvement in street sex work
- > Highlighting education/training and/or employment opportunities to those at risk of ongoing involvement in street sex work

- > Reducing substance dependence and supporting the development of protective factors such as stable housing and education/training opportunities
- > Developing positive relationships, confidence and self-esteem.

To date, 11 volunteer mentors have been fully trained, 15 at-risk young women are receiving intensive one-on-one support and 30 are engaged through assertive outreach.

All numbers will increase as the project expands. Much valuable information about needs and service delivery is being uncovered and shared with partners and stakeholders.

*“The grant from Helen Macpherson Smith Trust has allowed us to step into this space and help where no one has gone before,”* says St Kilda Gatehouse CEO Sally Tonkin. *“It has opened up a huge need.”*

*“We are working where women’s lives are in crisis, where it is so difficult to get out of addiction and sex work. We are also helping to divert young women away from the lives these older women have experienced.”*

Project	Amount	www	Program
Growing the Central Victorian Biolinks	\$80,000 over two years	wilderness.org.au	Land Stewardship <small>Under our new grants structure, Land Stewardship is now Land and Environmental Stewardship.</small>

TRUST OBJECTIVES	PROJECT OBJECTIVES	
Rural and regional Victoria	Build a network of landcare and conservation groups across Central Victoria from the Grampians to the Alps.	
Building capacity	Coordinate and service more than 100 independent environmental groups to facilitate large-scale environmental projects.	
Collaboration and partnership	Partnerships include the Wilderness Society, Victorian National Parks Association, Trust for Nature, Bendigo and District Environmental Council, Bush Heritage Australia, BirdLife Australia and CSIRO.	

The power of numbers leads to a whole-of-landscape approach

‘Growing the Central Victorian Biolinks’ is an initiative based on broad sector collaboration and aimed at restoring biodiversity and ecological health of Victorian landscapes. The Wilderness Society, a community-based organisation whose focus includes landscape scale projects in Victoria, has partnered with the Victorian National Parks Association and Trust for Nature (as the Victoria Naturally Alliance) to develop and manage projects which no single non-government organisation could achieve on its own. At the local level, 10 networks covering 75 landcare groups are working to restore the environment while sharing information and learning.



IMAGE  
Goldfields cluster meeting, Bendigo 2013.

A loss of biodiversity and ecosystem health prompted the creation of the Central Victorian Biolinks project, a long-term initiative that brings together and supports many landcare and conservation management networks stretching from the Grampians to the Alps.

Central Victoria is a high-priority landscape but, when the region was not granted Commonwealth Biolinks funding, the Trust was approached to extend its June 2012 pilot grant so the project’s momentum could be maintained.

The project supports people and networks to collaborate through vision, goal building, science and planning, along with the development of an information and support hub to facilitate peer-to-peer learning and implementation on the ground.

A whole-of-landscape approach is needed to rebuild well-connected and functioning landscapes, including linking protected areas with areas of remnant habitat.

PROJECT AIMS

These included:

- > Continue development with Melbourne Ark member networks, a biolink project from Moorabool to the Strathbogies
- > Continue building the Victoria Naturally Alliance and partnerships
- > Develop the knowledge base and deliver priority activities
- > Further develop and implement the communications and fundraising plan.

*“The Trust’s funding has enabled us to survive and we’re underway in three regional landscape projects,”* says Victorian National Parks Association’s Team Leader, Karen Alexander.

Melbourne Ark’s six landcare and conservation management networks are mapping biolinks, while the Goldfields are connecting current projects and expanding resources. Project Platypus and partners are working from the Grampians to the Pyrenees on a pilot climate change planning process.

A major up-scaling of effort is being planned with project partners.



# 2013 Grants

## Small Grants

Up to \$25,000

### NEW GRANTS STRUCTURE. NEW GRANTS LEVELS. NEW GRANTS DATES.

The Trust's new grants program will be effective from February 2014.

#### Araluen Centre

*araluen.org*  
Literacy Room  
\$13,838

#### Awards Victoria

*awardsvic.org.au*  
Confidence and Connections  
Project - pilot  
\$25,000

#### Bass Coast Community Health Service

*bcchs.com.au*  
Men's Shed Project  
Facilitator  
\$25,000

#### Bethany Community Support Inc

*bethany.org.au*  
Early Connections Program  
\$15,000

#### Bone Marrow Donor Institute

*fightcancer.org.au*  
Back on Track  
\$20,000

#### Brainlink Services

*brainlink.org.au*  
Ballarat ABI Education  
Program for Carers  
and Families  
\$9,000

#### Bungalook Creek Wildlife Shelter Inc

*bungalookcreekwildlifeshester.com*  
Distribution of state wide  
intensive care units for  
orphaned native wildlife  
\$8,451

#### Cancer Council Victoria

*cancervic.org.au*  
Cancer Council Training  
and Resource Centre –  
Digital Reach Project  
\$20,000

#### Carringbush Adult Education Inc

*carringbush.org.au*  
English Skills for  
the Workplace  
\$20,000

#### Castlemaine State Festival

*castlemainefestival.com.au*  
World Premiere Season: The  
Republic of Trees: a tale  
between earth and sky  
\$19,000

#### Children's Cancer Centre Foundation

*cccf.org.au*  
Regional Outreach  
Tool Box Program  
\$8,460

#### Cobram Community House Inc

*ccb.vic.edu.au*  
Better Learning Locally  
\$16,588

#### Community College Gippsland Ltd

*ccg.asn.au*  
Hydroponic Social Enterprises  
\$20,000

#### Community Houses Association of the Outer Eastern Suburbs Inc

Learning to solve the  
governance maze  
\$21,310

#### Cooinda Village Inc

*cooindavillage.org.au*  
Kiosk/Beauty Salon  
\$25,000

#### Corryong Neighbourhood Centre

Corryong Youth Space  
\$23,414

#### Daylesford Community Theatre

*therex.org.au*  
The Rex Theatre  
– redevelopment  
\$23,500

#### Djerriwarrh Employment & Education Services

*djerriwarrh.org.au*  
Brimbank – Young  
People Our Future  
\$25,000

#### Down Syndrome Association of Victoria Inc

*downsyndromevictoria.org.au*  
Strengthening support for new  
families of a baby with Down  
Syndrome in regional Victoria  
\$20,100

#### Edgar's Mission Inc

*edgarsmission.org.au*  
Humane Education  
Centre redevelopment  
\$22,000

#### Encompass Community Services Inc

*encompass-cs.org.au*  
“The Paddock” – New wing  
\$25,000

#### Environment Victoria Inc

*environmentvictoria.org.au*  
Our Rivers Our Lifeblood  
\$15,000

#### Epworth Foundation

*epworth.org.au*  
Accommodation support  
scheme for disadvantaged  
country patients  
\$25,000

#### Foundation 61 Inc

*foundation61.org.au*  
Vocational Training  
Workshop – extension  
\$25,000

#### Gippsland Disability Advocacy Inc

*gdai.org.au*  
Social Change Through  
Inclusive Leadership  
\$15,000

#### Glen Eira Adult Learning Centre Inc

*gealc.org.au*  
Increased access to IT for  
seniors, migrants and people  
finding work in Glen Eira  
\$20,000

#### Green Collect

*greencollect.org*  
Retail mentoring and  
pathways for refugee  
communities  
\$25,000

#### Guide Dogs Victoria

*guidedogsvictoria.com.au*  
Get Real Program  
\$18,800

#### Haven

*haven.org.au*  
Getting Ready for  
the Next One!  
\$25,000

#### Helping Hoops Inc

*helpinghoops.com.au*  
Helping Hoops After-School  
Central Program  
\$8,500

#### Helping Hoops Inc

*helpinghoops.com.au*  
Helping Hoops  
Fitzroy – extension  
\$8,500

#### Hillview Bunyip Aged Care Inc

*hillviewbunyip.org.au*  
Community Hub/  
Bunyip Men's Shed  
\$15,000

#### Hotham Mission Asylum Seeker Project

*hothammission.org.au*  
Self-Education Project  
\$8,000

#### Housing Resource and Support Services Inc

*hrss.com.au*  
Central, Murray and  
Grampians housing resource  
for people with disabilities  
\$20,000

#### Ilbijerri Aboriginal and Torres Strait Islander Theatre Co-op Ltd

*ilbijerri.com.au*  
‘More Than Love’  
– performance  
\$25,000

#### Jewish Museum of Australia

*jewishmuseum.com.au*  
Air conditioning upgrade  
\$10,000

#### Cockatoo Voices: A children's community publishing project

*kidsownpublishing.com*  
Cockatoo Voices: A children's  
community publishing project  
\$25,000

#### King's College

*kingscollege.com.au*  
King's College Pipes and  
Drums Band – purchase  
of instruments  
\$10,000

#### Lifeline Gippsland Inc

*lifeline.org.au/gippsland*  
Partners in Depression:  
for people who love  
or support someone  
experiencing depression  
\$7,320

#### Mawarra Centre Inc

*mawarra.org.au*  
Jindivick and Mawarra  
Garden Sculpture Award  
\$7,000

#### Mpower Inc

*mpower.org.au*  
Mums Matter  
\$6,000

#### North Central Rural Financial Counselling Service (Vic) Inc

*vtarcg.org.au*  
Small Business Recovery  
\$25,000

#### North East Support and Action for Youth Inc

*nesay.com.au*  
LinX2home – setup costs  
\$25,000

#### Nullawil Historical Society

Winston Church Revival  
\$25,000

#### Onemda Association Inc

*onemda.com.au*  
Educational library for  
intellectually disabled students  
\$24,270

#### Open Channel

*openchannel.org.au*  
New Aboriginal Filmmaker  
Training Production  
Initiative 2013  
\$25,000

#### Park Lane Nursery

*parklanenursery.com.au*  
Shadehouse Renewal Project  
\$24,590

#### Peter Harcourt Services Association Inc

*rds.org.au*  
Preparing for business in  
an NDIS world – ‘Imagine,  
Inspire, Individualise  
@ Garsed Street’  
\$21,500

#### Realise Enterprises Inc

*tastyplate.com.au*  
Stage 2 Development of  
Tasty Plate Social Enterprise  
\$24,000

#### River Nile Learning Centre Inc

*rnlc.org.au*  
Computer System – set up  
\$9,600

#### Royal Agricultural Society of Victoria

*rasu.com.au*  
Sheaf Tossing to Sponge  
Cakes: Sourcing and  
celebrating rural and  
regional champions  
\$25,000

#### School of Hard Knocks Institute

*choirofhopeandinspiration.com*  
‘Play It Forward’ -  
Documenting the Hard  
Knocks method  
\$22,623

#### SEAAC Youth Services

*seaac.org.au*  
Multicultural Experiential  
Learning Program  
\$24,500

#### Shepparton Villages

*sheppvillages.com.au*  
Installation of Air Comfort  
Chair – tilt beds  
\$25,000

#### South Port UnitingCare

*southportuc.org.au*  
Roll On!  
\$16,278

#### Sovereign Hill Museums Association

*sovereignhill.com.au*  
Narmbool Environmental  
Learning Scholarships  
\$16,821

#### St Andrew's First Aid

*firstaid.org.au*  
St Andrew's First Aid –  
Cadet program (Ballarat)  
\$16,000

#### St John Ambulance Australia (Victoria) Inc

*stjohnvic.com.au*  
UHF radios for vehicles used  
by first aid volunteers in  
regional and rural Victoria  
\$19,026

#### The Neighbour's Place Inc.

*neighbourspl.org.au*  
Christmas Food Hampers  
\$5,000

#### The New Hope Foundation Inc

*newhope.asn.au*  
Refugee Women's  
Support Group  
\$15,000

#### The Tree Project Inc

*treeproject.asn.au*  
Species Selection Guide  
\$3,600

#### Think Pink Foundation

*thinkpink.org.au*  
Providing services to people  
affected by breast cancer  
in rural communities  
\$25,000

#### Trinity College

*trinity.unimelb.edu.au*  
Engage  
\$23,625

#### Vicdeaf

*vicdeaf.com.au*  
Grants capacity  
building expertise  
\$8,590

#### Weave Movement Theatre Inc

*weavemovementtheatre.com.au*  
One Lump Or Two -  
performance season  
\$10,000

#### Weenthunga Health Network Inc

*weenthunga.com.au*  
Building resilience in First  
Australian school girls  
\$25,000

#### Western Edge Youth Arts Inc

*westernedge.org.au*  
Leading Edge: young people's  
community engagement and  
leadership through the arts  
\$10,000

#### Wingate Avenue Community Centre Inc

*wingateave.com.au*  
Macpherson Smith  
Computer Lab  
\$24,991

#### Women's Health Victoria Inc

*wbv.org.au*  
Connecting to data,  
looking to the future:  
restructuring The Index  
\$9,890

Impact Grants

Above \$25,000. Grants in this stream can extend over a one–, two– or three-year period.

NEW GRANTS STRUCTURE. NEW GRANTS LEVELS. NEW GRANTS DATES.  
The Trust’s new grants program will be effective from February 2014.

**Art Gallery of Ballarat**  
artgalleryofballarat.vic.gov.au  
Scottish Australia: From First Fleet to Federation  
\$50,000

**Asylum Seeker Resource Centre Inc.**  
asrc.org.au  
Asylum Seeker Centre for Employment and Enterprise – Dandenong – pilot  
\$80,000

**Australian National Academy of Music Ltd**  
anam.com.au  
ANAM Health and Wellbeing Program  
\$94,500

**Bendigo Art Gallery**  
bendigoartgallery.com.au  
Bendigo Art Gallery Redevelopment – Fit-out of collection storage facility  
\$100,000

**Deakin University**  
deakin.edu.au  
Therapy Outcomes By You (TOBY) Playpad for early intervention in autism  
\$130,000

**FareShare**  
fareshare.net.au  
Rural Fresh Food Phase 2  
\$90,000

**Food Skil Inc**  
foodskil.org.au  
Food Skil  
\$37,000

**Glastonbury Community Services**  
glastonbury.org.au  
Schools and Family Connections  
\$90,000

**Independence Australia**  
independenceaustralia.com  
Breaking Down the Barriers – Indigenous disability access  
\$80,000

**Jewish Holocaust Centre**  
jhc.org.au  
Establishment of a digital resource centre  
\$86,000

**Royal Society For The Prevention Of Cruelty To Animals**  
rspcavic.org.au  
Education – 21st Century Learning Spaces (Stage 1)  
\$38,950

**Springvale Community Aid and Advice Bureau**  
scaab.org.au  
Earn to Learn – extension  
\$100,000

**St Kilda Gatehouse Inc**  
stkildagatehouse.org  
Navigating a New Path  
\$151,292

**The Wilderness Society Victoria Inc**  
wilderness.org.au  
Growing the Central Victorian Biolinks project  
\$80,000

**Trust For Nature (Victoria)**  
trustfornature.org.au  
MATCH: Matching Appropriate Tools for Conservation and Habitat - prioritisation and planning for South West Habitat 141  
\$120,000

**University Of Melbourne**  
unimelb.edu.au  
Conservation Channel  
\$100,000

**Victoria University**  
vu.edu.au  
Supporting the connection to education and community of disadvantaged Harvester Technical College students  
\$100,000

**Victorian Association for the Care and Resettlement of Offenders**  
vacro.org.au  
Court-based Family Support Project  
\$286,800

**Woor-Dungin Inc**  
woor-dungin.com.au  
Woor-Dungin establishment and operation  
\$30,000

NOTE:  
The list represents grants approved in the 2012–13 year and does not include a number of forward commitments for major grants made in previous years and grants approved in prior years but withdrawn in the current year.

Strategic aims at work

The case studies which follow are outstanding examples of the Trust’s strategic aims at work: *Building. Enabling. Leading.*

These aims include building the capacity of charitable organisations and the communities they serve, enabling collaborative projects that can deliver even greater social benefits and supporting initiatives that demonstrate leadership and invest in Victoria’s future leaders.

The Trust is committed to funding projects which will have a long-term community impact. The following three projects, which were awarded funding from just \$25,000 to \$1 million, are delivering significant benefits in the mental health field, for Victoria’s 2009 bushfire communities, and for rural leaders of the future.



<b>Project</b> Strengthening the Foundation: Expansion of Operating Resources	<b>Amount</b> \$625,000  <b>Granted</b> 2012	<b>www</b> msrf.org.au	<b>Program</b> Rural and Regional Victoria <small>Under our new grants structure, Rural and Regional Victoria is now Regional Resilience.</small>
--	--	---------------------------	---

TRUST OBJECTIVES	PROJECT OBJECTIVES
<b>Rural and regional Victoria</b>	Build a cohort of young people completing tertiary studies and returning to regional and rural Victoria as future leaders.
<b>Building capacity</b>	Deliver the skills and capacities of young rural and regional individuals through a range of programs including: university scholarships, leadership network, mentoring, employment/work experience and research.
<b>Extending opportunity</b>	Provide opportunities to potential rural leaders equal to their metropolitan peers.
<b>Collaboration and partnership</b>	State and local governments, rural businesses and professional associations.



### Promising young future leaders emerge through Macpherson Smith Rural Foundation

The Macpherson Smith Rural Foundation (MSRF) is the biggest initiative and largest financial commitment of the Helen Macpherson Smith Trust. In 2008 the Trust provided \$5.75 million as a corpus towards the establishment of an independent, regional-based entity to fulfil the Trust’s vision of a thriving, confident rural Victoria driven by inspiring leaders. This corpus has been supported with additional funding of \$625,000 towards operations and the establishment of the scholarship, mentoring and future rural leaders’ programs. These programs are attracting the best and brightest young people who are committed to the viability of their communities. Well over 100 have participated, and some are already launching new initiatives.



“These programs are attracting the best and brightest young people who are committed to the viability of their communities”

The Macpherson Smith Rural Foundation was set up both to honour the heritage of Helen Macpherson Smith, whose family wealth came largely from the Victorian land, and to expand the Trust’s scope of giving in rural and regional Victoria through a foundation firmly embedded in the regional community.

Based in Ballarat and able to tap into needs, solutions, collaborative partnerships and additional funding, the MSRF is taking a key role in promoting and enabling renewal, regeneration and development in rural Victoria.

#### PROJECT AIMS

- > Enabling: be a pivotal catalyst for attracting future leaders to enable vibrant rural communities
- > Enhancing: build partnerships and alliances that enhance, support and promote MSRF’s mission
- > Changing culture: promote a narrative that strengthens the importance of rural Victoria
- > Informing: share information and research that drives change initiatives in rural communities.

The Foundation’s programs for scholarships, mentoring, career support, leadership development and networking have empowered 100 of Victoria’s most promising young rural leaders.

MSRF’s Executive Officer, Pete Ekstedt says the programs have attracted “standout young people” who typically have been school captains or committee members of student representative bodies and sports clubs, have deep community involvement and are committed volunteers.

Robust network connections have been established with mentors and business leaders who have a strong interest in supporting young people, and MSRF has partnered with rural leadership programs to deliver a series of workshops for rural and regional community leaders on the benefits of youth mentoring.

#### Impacting on regional communities

“There is an incredible strength in the network of committed young rural leaders right across Victoria,” Mr Ekstedt says. “It’s made an enormous impact in regional communities in a short space of time, all enabled by the generosity of the Trust.”

Nine outstanding students have been awarded university scholarships of up to \$15,000 a year for three years, with a further three scholarships to be awarded in 2014. All students are supported in their transition from school to university, and are committed to return to a rural Victorian community after graduation.

The mentoring program currently has 49 pairs of mentors/mentees. A transition mentor, usually a current university student, supports participants through the first year of university. Mentees are also guided by a career mentor for up to three years regarding career pathways, employment opportunities and network development.

#### Nil university drop-out rate

“All mentees are still enrolled in university. This is a significant achievement as research shows that rural students tend to drop out faster than city students in the first year because of the cost of relocating away from home, loneliness, culture shock and isolation,” Mr Ekstedt says.

There has been very close bonding between participants, and at least a dozen are sharing houses in Melbourne.

#### Young rural leaders to the fore

MSRF’s Future Rural Leaders Program has run week-long residential programs and evening skills development workshops for 77 participants.

Three new projects and initiatives have already emerged from the residential programs. Conceived and driven by the young rural leaders themselves, the programs are designed to build thriving, more sustainable communities:

- > ‘Adopt-A-Town’, designed to encourage business and government investment in rural and regional Victoria, and the promotion of environmental and economic sustainability
- > ‘WAVES’, a new playwriting competition for young rural writers aged 12 to 25, preceded by free writing and voice acting workshops
- > ‘Inspiring Manangatang’, with a visit by motivational speaker Sebastian Terry, author of *100 things. What’s on your list?* It was created to inspire residents of this tiny, remote town to achieve the things in life that are important to them.

#### IMAGE

Recipients of the 2013 MSRF Foundation Scholarships.



Project

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

Amount

\$25,000

Granted

2008

www

vmiac.org.au

Program

Health Research

Under our new grants structure, Health Research is now Health Advancement.

TRUST OBJECTIVES

Building capacity

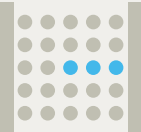
Drive policy change to address the systemic sexual abuse or harassment by male patients in Victoria’s psychiatric inpatient units.

Extending opportunity

Protect the basic rights of women receiving inpatient psychiatric care.

Collaboration and partnership

Collaboration with the Department of Human Services, numerous psychiatric support services in the metropolitan, regional and rural areas and community service providers.



Zero Tolerance for Sexual Assault: A safe admission for women

A study by the Victorian Mental Illness Awareness Council (VMIA), the peak body for people with mental illness or emotional problems, has revealed shocking statistics on psychiatric admission experiences for women. Data gathered from nine Area Mental Health Services (AMHS) across the state showed that 85% of women felt unsafe during hospitalisation, 67% reported experiencing sexual or other forms of harassment from male patients and 45% had experienced sexual assault. Just over 60% reported the assault to nurses, but 82% indicated the nurses’ responses were “not at all helpful”.



“The report became a major catalyst for action, and decision makers’ doors, which previously had been closed, were suddenly opened.”

While the level of abuse suffered by women in psychiatric inpatient units would not be tolerated in any other area of health, strategies such as female-only corridors, women’s lounges and gender-sensitive training have had no real impact on improving the rights of women to feel safe and be safe.

Policies and practice protocols to address these rights have not been updated for more than a decade, and women’s safety has not been given the high priority recommended in *The Patient Majority: Mental Health Policy and Services for Women* report released 20 years ago.

With the goal of raising public awareness and driving change, VMIA undertook an extensive project funded by the Trust, including surveys, focus groups, individual consultations, literature research and data analysis.

The project report, *Zero tolerance for sexual assault: a safe admission for women* was released in May 2013. The report’s recommendations included:

- > Zero tolerance of sexual assault or harassment in all Victorian psychiatric services; new preventative strategies and biannual reporting of outcomes for all psychiatric inpatient units
- > Mandatory reporting of all allegations and preparation of incident reports; data to be included in the annual report of the Office of the Chief Psychiatrist
- > Expand the Office of the Chief Psychiatrist to include random spot checks and audits of inpatient units

- > A nursing history and care plan for every patient; a minimum of two nurses on wards at all times
- > CASA (Centre Against Sexual Assault) services offered to inpatients where required
- > Continued funding for education in Victorian psychiatric wards; all clinicians to undertake training on human sexuality
- > Ongoing funding for VMIA to monitor women’s safety and conduct further surveys
- > An all-stakeholder committee including government, union members, the Australian Nursing Federation and VMIA to work through recommendations and develop further strategies.

PROJECT OUTCOME

When the project report was released, a public outcry resulted. The *ABC 7.30 Report* aired the story, and an avalanche of phone calls and emails from around Australia prompted a follow-up program. Thousands of comments were posted on Facebook. What was a state issue quickly became a national issue.

The report became a major catalyst for action, and decision makers’ doors which previously had been closed were suddenly opened.

The report was forwarded to the National Mental Health Commission, which is discussing a national approach, says VMIA Director, Isabella Collins. In Victoria, the Minister for Mental Health has met with chairpersons of hospital boards regarding prioritising the issue of women’s safety, which is now being written into hospital service agreements.

“We are discussing with the Department the need for a trauma-informed care approach and the need for holistic nursing histories to be taken when a person is admitted to hospital,” Ms Collins says. “We are keeping this on the agenda.”

Major community service providers such as Uniting Care are also urging the Minister to implement all recommendations in the report.

“I want to thank the Trust for its support in providing the funding to enable us to undertake this project,” Ms Collins says. “Thank you is such a small thing to say, but it is truly meant.”

IMAGE

VMIA Director, Isabella Collins (left) and Systemic Advocate, Terry McNeillage, at handover of final report.

<b>Project</b> Establishing Communal Gardens in Bushfire Affected Communities	<b>Amount</b> \$1,000,000	<b>www</b> sgaonline.org.au	<b>Program</b> Rural and Regional Victoria <small>Under our new grants structure, Rural and Regional Victoria is now Regional Resilience.</small>
	<b>Granted</b> 2010		

TRUST OBJECTIVES	PROJECT OBJECTIVES
<b>Rural and regional Victoria</b>	Develop communal demonstration gardens, POD (Productive Organic and Diverse) neighbourhood gardening groups and workshops in bushfire- affected communities.
<b>Building capacity</b>	Establish long-term sustainable gardens, maintained and harvested by their respective community groups.
<b>Extending opportunity</b>	Provide a long-term communal asset that helps heal the psychological, social and environmental scars caused by devastating fires.
<b>Collaboration and partnership</b>	Collaboration and partnerships with state and local government, the nursery and garden industry, landscape industry professionals, Rotary, Lion's Club, Men's Sheds and community.



Communal gardens sowing long-term benefits for bushfire communities

Within 48 hours of Black Saturday 2009, the Trust agreed to set up a special \$2 million fund to assist communities whose townships had been damaged or destroyed by devastating bushfires. One million dollars was granted to bushfire related projects, and in 2010 \$1,000,000 was also granted to Sustainable Gardening Australia (SGA) which encourages and educates home and professional gardeners to adopt sustainable gardening practices. Communal garden projects were established by SGA, creating closer community ties in fire-ravaged districts, allowing emotional and environmental healing and building precious new assets.



“The gardens’ lasting impact is that they pay tribute to each community’s resilience and their willingness to embrace change and turn adversity into triumph.”

*“We became so close in the aftermath of the fires. We learnt each other’s names and we relied on each other. We needed to find some way that we could stay connected in the future and the community garden gave us this connection,”* says Liz Duell, a survivor of the Jindivick bushfires. The ‘social glue’ which binds communities together can be quickly torn apart by natural disasters. Feelings of connected-ness and self-worth can disappear, and individuals may retreat into their own shattered worlds.

SGA was very aware of the intense difficulties faced by such wounded and fractured communities. It proposed three options to meet the differing needs of communities and their ability to engage in the project at that time: communal demonstration gardens; productive, organic and diverse (POD) gardening groups; and a freely available instruction manual born of these projects. The Trust supported the project because SGA’s powerful concept would not only reconnect people and give them pride in their achievements, but would provide a long-term, tangible community benefit.

- PROJECT AIMS
- > Establish four Communal Demonstration Gardens as perpetual and widely accessible community assets (a fifth was added in 2013)
  - > Establish six Productive, Organic and Diverse (POD) Gardening Groups so communities can learn new skills, develop friendships and share sustainable gardening resources
  - > Develop a free Communal Demonstration Garden instruction manual for Victorian groups wishing to set up similar projects

- > Promote positive psychological, social and environmental outcomes
  - > Provide training to develop local skills and increase confidence in gardening activities
  - > Encourage community engagement through gardening.
- SGA’s Project Manager Elaine Shallue says the gardens’ lasting impact is that they pay tribute to each community’s resilience and their willingness to embrace change and turn adversity into triumph.

“Each of these communities has worked together to achieve an asset that reflects not only who they are but also the values they brought to the process. The philosophy of all of the gardens is that there cannot be community gardens without the community.”

PROJECT OUTCOMES

Four Communal Demonstration Gardens were established in Jindivick, Yinnar and District, Beechworth, and Toolangi and Castella. A fifth, in Yackandandah, was created in early 2013 when surplus funds were available. The gardens, some of which have already become remarkable showcases attracting visitors as well as locals, are open to all members of the community as a hands-on learning resource and meeting place. POD groups were set up in six other communities: Callignee, St Andrews, Yarra Glen, and Dixons Creek and Clonbinane, with Yea and Glenburn joining in September 2013. These self-sustaining neighbourhood groups share knowledge, seeds, tools and tasks in each other’s gardens, working closely together to grow produce sustainably in their backyards.

The gardens’ processes and pitfalls have fed into the Communal Demonstration Garden instruction manual, freely available in hard copy and electronic format to all local governments and communities. Strong management and governance frameworks have been created for all gardens. Gardening workshops, food swaps and preserving days are arranged, and links have been formed with other community activities such as farmers’ markets and garden open days. The Jindivick garden has launched a garden sculpture acquisition prize through a partnership with Mawarra disability services in Warragul, supported by an additional \$7000 funding from the Trust.

“Community is more than just the gardeners – it is the artists and philosophers, the young and the aged, the newcomers to town and the long-term residents. Community gardens provide an opportunity for all to be welcomed and for the beauty and joy of a garden to be shared and enjoyed,” Ms Shallue says. All numbers will increase as the project expands. Much valuable information about needs and service delivery is being uncovered and shared with partners and stakeholders.

IMAGE  
Garden Arch, Jindivick Community Garden  
Sculptor: Graham Duell.



# Investments and 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 62 years of the Trust’s operations.

The value of the investment corpus is approximately \$89.9 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
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
2010	86,318	83,842
2011	84,162	89,516
2012	78,322	79,809
2013	81,867	89,966

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
2010	30,389
YEARS ENDED	\$ 000's
2006	4,649
2007	4,400
2008	5,725
2009	10,506
2010	5,109
2011	5,523
2012	5,536
2013	3,159
TOTAL GRANTS	99,540

# Investment review

The objectives of the Trust’s investment activities are twofold: firstly to achieve long-term appreciation of the capital value of the corpus, and secondly to generate sufficient income to fund the annual grant giving program and operating expenses. Long-term growth in the value of the corpus is essential if the Trust is to serve Victoria’s communities in the future as well as it has done in the past.

Investment functions at the Trust are controlled by the Investment Committee, comprising a sub-group of trustees, two external consultants, the Chief Executive and an experienced Investment Executive. The Committee continues to believe that its investment objectives are best met by having a large exposure to quality, high-yielding Australian shares. Investments are restricted to larger well-established companies with strong balance sheets. This exposure to lower risk companies means the Trust’s portfolio is likely to fall by less than the ASX200 index during weak market conditions, and to rise by less in strong markets. The Trust also has fixed interest investments which are well-diversified and restricted to issuers with strong credit ratings.

The year ending June 2013 proved to be very favourable for share markets and, with the Trust’s substantial exposure to Australian equities, this resulted in a pleasing 13% increase in the value of the corpus. In addition, \$7.2m of income was generated from the Trust’s investments.

The dominant issue in global financial markets last year was the continuation of highly stimulatory monetary policy by the world’s major central banks. In July 2012 the governor of the European Central Bank set the tone by declaring his bank would do “whatever it takes” to support the Euro area. In September, the US Federal Reserve announced a third, open-ended round of quantitative easing with a target of buying US\$40bn of bonds a month, increased to US\$85bn in December. The Bank of Japan later announced a plan to inject US\$1.4trillion into the Japanese economy over two years, in effect doubling its money supply. Nor was the Reserve Bank of Australia idle when it cut official interest rates three times to a then record low of 2.75%.

With interest rates and bond yields at very low levels, investors were virtually forced to buy riskier assets like shares to maintain income levels. This was reflected in strong investor appetite for companies with sustainably high dividend yields. The Australian market also reacted in this way, with much of the rise in the ASX 200 index driven by substantial gains in stocks such as Telstra, Wesfarmers and the major banks.

In contrast, the resource sector was weak, as a combination of weaker commodity prices and rising costs led to sharply lower profit margins in the industry. Commodity prices lost ground due to weaker demand as the Chinese economy slowed to more sustainable rates of growth, while at the same time, commodity supply increased as major capacity expansions came on stream. The resource industry has responded by cutting back on investment and focusing on reducing operating costs.

Looking ahead, the Australian economy is facing a major challenge as the current very high levels of capital investment in the resource sector decline to more normal levels. Other areas of the economy will respond to the stimulus of low interest rates and a lower exchange rate, but this will only occur with a lag. Such a transition in economic growth is unlikely to be seamless, and business conditions are expected to remain challenging for most companies in the year ahead. This suggests the Reserve Bank will keep interest rates low for most of 2014.

Overseas, developed economies are at long last showing signs of recovery from the very weak conditions induced by the GFC. If these trends are sustained, some withdrawal of quantitative easing is expected, but interest rates are likely to remain low by historical standards for some time to come.

The combination of a recovering world economy and low interest rates is generally supportive of equity markets, but the strong gains already achieved through FY2013, and the likely reduction in central bank quantitative easing, suggests investment returns will be more modest in the year ahead.

*Peter Wetherall*

Peter Wetherall  
Investments Executive

Year	Capital Portfolio \$ 000's	Performance Change	ASX 200 Index	Change
2009	\$76,640	-21%	3956	-24%
2010	\$83,842	9%	4302	9%
2011	\$89,516	7%	4608	7%
2012	\$79,809	-11%	4095	-11%
2013	\$89,966	13%	4803	17%

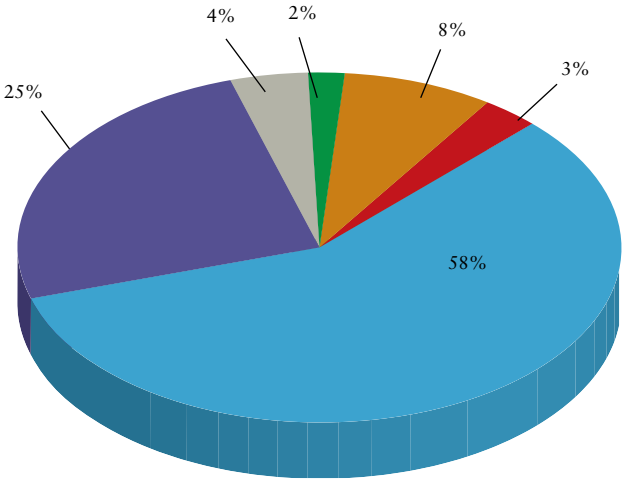


# Financial summary

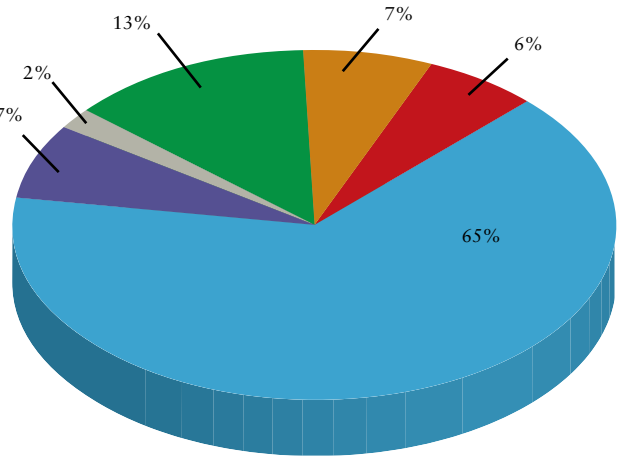
## Statement of surplus or deficit for the year ended 30 June 2013

	2013	2012
	\$	\$
REVENUE		
Income from investments	7, 171,241	7, 016,005
EXPENSES	(1,399,270)	(1,563,342)
OPERATING SURPLUS	5,771,971	5,452,663
Grants approved during year	(3,159,240)	(5,536,048)
SURPLUS(DEFICIT) FOR THE YEAR	2,612,731	(83,385)
Attributable to Capital Account	(102,391)	(52,064)
Attributable to Income Account	2,715,122	(31,321)

## Income and expenditure 2013



<b>Income</b>	
Franked dividends	4,175,440
Franking credits	1,767,720
Unfranked dividends	295,667
Call option premiums	133,684
Interest	574,456
Management fees and other	224,274
	7,171,241



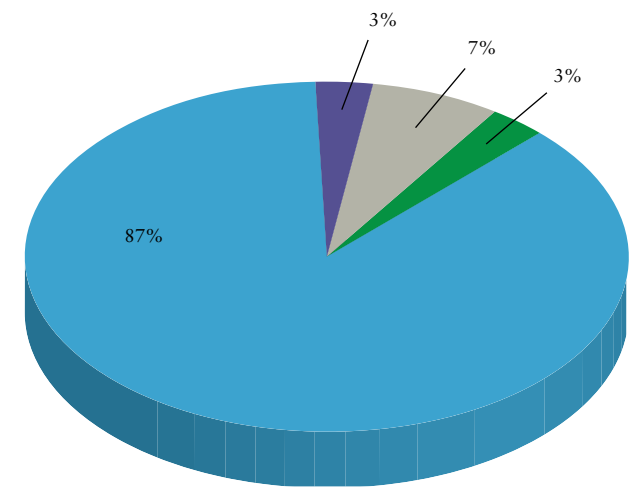
<b>Expenses</b>	
Occupancy	98,335
Investment, finance and grant expenses	88,505
Employment and trustee expenses	913,499
Depreciation and amortisation	99,929
Legal	23,056
Other	175,946
	1,399,270

Financial Position 2013

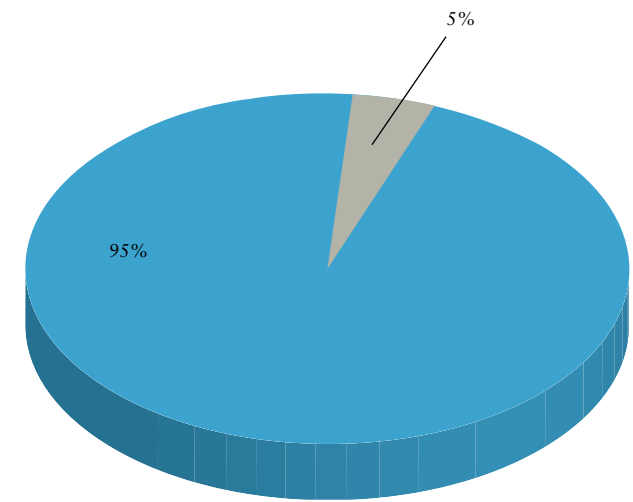
STATEMENT OF FINANCIAL POSITION AS AT 30 JUNE 2013

		2013	2012
		\$	\$
ACCUMULATED FUNDS	Retained surplus	87,982,471	82,514,665
	Financial assets at fair value through other comprehensive income reserve	8,196,254	1,498,957
		96,178,725	84,013,622
REPRESENTED BY:			
CURRENT ASSETS	Cash and cash equivalents	6,785,827	10,702,519
	Trade and other receivables	3,054,333	2,860,112
		9,840,160	13,562,631
NON-CURRENT ASSETS	Other financial assets	88,128,842	72,571,622
	Property, plant and equipment	3,047,249	3,117,039
		91,176,091	75,688,661
TOTAL ASSETS		101,016,251	89,251,292
CURRENT LIABILITIES	Trade and other payables	4,830,363	5,155,349
	Provisions	7,163	70, 938
		4,837,526	5,226,287
NON-CURRENT LIABILITIES	Provisions	-	11,383
		-	11,383
TOTAL LIABILITIES		4,837,526	5,237,670
NET ASSETS		96,178,725	84,013,622
		Attributable to Capital Account	89,965,716
		Attributable to Income Account	6,213,009

Assets and liabilities 2013



Assets	
Cash	6,785,827
Receivables	3,054,333
Investment portfolio	88,128,842
Fixed assets	3,047,249
	101,016,251



Liabilities and accumulated funds	
Payables and provisions	4,837,526
Accumulated Funds	96,178,725
	101,016,251



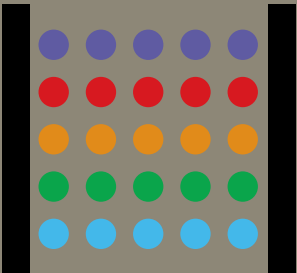
**FRONT COVER**

The graphic interpretation of the Trust's grants matrix.

Our five programs are represented on the vertical axis and our five key objectives on the horizontal axis. Applicants' project objectives should match at least three of the Trust's key objectives.

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

**EDITOR**  
Pam Kershaw







Helen Macpherson Smith Trust

27 Windsor Place  
Melbourne Victoria 3000

TEL +61 3 8370 2699  
EMAIL [info@hmstrust.org.au](mailto:info@hmstrust.org.au)

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